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Employment Lands Analysis

Scenic Rim Regional Council

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1 Introduction

Bull & Bear Economics was engaged by Scenic Rim Regional Council to prepare an economic analysis which will consider the capacity of employment land within Scenic Rim Regional Council to accommodate projected employment growth at a small area level.

1.1 Report Purpose

Through discussions with Scenic Rim Regional Council, it was established that, with regards to this piece of work, Council has three key objectives, namely;

- Determine whether Scenic Rim has sufficient existing zoned land available to accommodate the ShapingSEQ employment benchmark of 7,610 new jobs between 2016 and 2041; and
- Confirm whether the location and type of employment land is sufficient to meet Scenic Rim employment growth forecasts.

As such, the purpose of this report is to provide Council with a comprehensive analysis of employment lands in the area, identify answers and provide potential solutions to the above-mentioned objectives.

1.2 Report Structure

This report is structured as follows:

- **Section 1 Introduction:** details the purpose of the report, report structure and study areas defined for the assessment;
- **Section 2 Baseline Employment:** this section provides employment baseline figures as of the 2016 Census for Scenic Rim Regional Council and the defined study areas;
- **Section 3 Employment Projections:** this section provides an overview of projected employment by industry for each study area;
- **Section 4 Bromelton SDA Employment Projections:** this section provides an overview of the Bromelton SDA and presents a potential land take-up and employment profile to 2041, recognising that the ShapingSEQ employment benchmark has assumed little take-up within Bromelton SDA to 2041;
- **Section 5 Projected Employment and Land Demand:** this section converts employment projections to employment projections by land use, through use of an employment to land use matrix;
- **Section 6 Vacant and Underutilised Site Assessment:** this section provides an overview of the quantum of vacant, underutilised and constrained land by zone across Scenic Rim Regional Council by locality;
- **Section 7 Capacity Assessment:** this section identifies the potential employment yield of vacant and underutilised land within Scenic Rim and discusses the capacity of employment land to accommodate growth at a catchment level; and
- **Section 8 Conclusions and Recommendations:** Provides an overview of the findings of this report and provides recommendations to Scenic Rim Regional Council.

1.3 Study Areas

For the purpose of this study, the relevant study areas for the Growth Management Strategy have been defined taking into consideration destination zone boundaries, the finest grain geography for which employment data is available. The study areas have been defined as follows:

+ Major Employment Nodes:
  - Beaudesert catchment: defined by the 313051831 DZN boundary;
  - Boonah catchment: defined by the 312771497 DZN boundary;
  - Canungra catchment: defined by the 312421833 DZN boundary;
  - Tamborine Mountain / Tamborine Village catchment: defined by the 312421834 DZN boundary;
+ Balance of Scenic Rim Regional Council:
  - Balance of Beaudesert SA2: defined as the balance of the Beaudesert SA2 outside of the Beaudesert catchment. The balance of Beaudesert SA2 also comprises the Bromelton SDA, which is anticipated to become a major employment node in the future, hence is considered separately in parts of the assessment; and
  - Balance of Boonah SA2: defined as the balance of the Boonah SA2 outside of the Boonah / Kalbar catchment.

Due to the geographic definition of the DZN boundaries, a balance area is not defined for the Tamborine – Canungra SA2.

Figure 1.1 illustrates the parameters of the relevant study areas for the purpose of this study, with Table 1.1 summarising the concordance of localities to study areas.

Figure 1.1 Geographic Definition of Study Areas

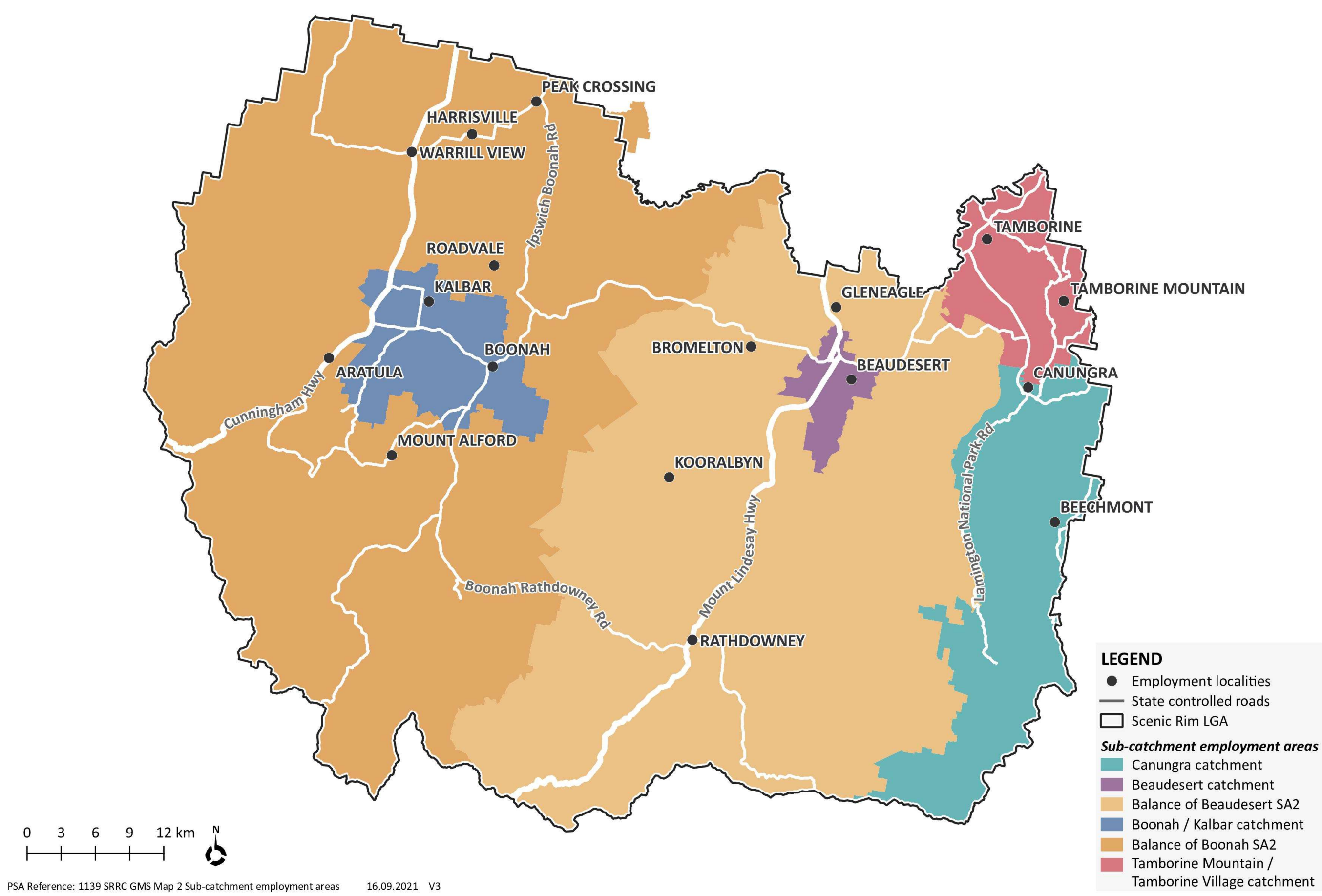


Table 1.1 Concordance of Localities to Study Area

Locality	Study Area
Beaudesert	Beaudesert catchment
Boonah	Boonah / Kalbar catchment
Kalbar	Boonah / Kalbar catchment
Tamborine Mountain	Tamborine Mountain / Tamborine Village catchment
Tamborine Village	Tamborine Mountain / Tamborine Village catchment
Canungra	Canungra catchment
Beechmont	Canungra catchment
Bromelton	Balance of Beaudesert SA2
Gleneagle	Balance of Beaudesert SA2
Kooralbyn	Balance of Beaudesert SA2
Rathdowney	Balance of Beaudesert SA2
Aratula	Balance of Boonah SA2
Harrisville	Balance of Boonah SA2
Mount Alford	Balance of Boonah SA2
Peak Crossing	Balance of Boonah SA2
Roadvale	Balance of Boonah SA2
Warrill View	Balance of Boonah SA2

Source: Scenic Rim Regional Council (2021)

2 Baseline Employment

The purpose of this section is to provide an employment baseline figure for each of the study areas as of the 2011 and 2016 Census. These estimates utilise DZN (finest grain available) data by industry (place of work data). Employment by industry data extracted from the 2011 and 2016 Censuses has been rebased to align with the most recent Queensland Treasury employment projections by industry for Scenic Rim LGA, as the Census typically under enumerates population and employment.

This overview summarises the number of workers in each geography, including a breakdown by industry of employment (at the single digit ANZSIC level).

2.1 Historic Employment by Study Area

The number of employed persons within the Scenic Rim LGA totalled 13,824 workers in 2011 and increased to 14,171 workers by 2016. The major employment centres within Scenic Rim LGA are within the Beaudesert, Boonah / Kalbar, Tamborine Mountain / Tamborine Village and Canungra catchments.

Historically, the Beaudesert SA2 has accounted for the highest proportion of total employment in Scenic Rim LGA, accounting for 41.9% of total employment in 2011 increasing to 42.2% of total employment in 2016. Between the past two Censuses, Beaudesert SA2's workforce also recorded the largest growth in the share of Scenic Rim LGA's workforce between 2011 and 2016. This is due to the increase in employment in the Beaudesert catchment from 3,848 workers in 2011 to 4,125 workers in 2016.

Within the Boonah SA2, there was a marginal decrease in the proportion of employment in this area relative to the other SA2s between 2011 and 2016. Over the same period, employment in the Tamborine Mountain / Tamborine Village catchment remained consistent (as a share of Scenic Rim LGA's working population), whilst the Canungra catchment recorded a marginally increasing share.

Table 2.1 below summarises the historic employment by study area as of the 2011 and 2016 Censuses.

Table 2.1 Summary of Historic Employment by Study Area, 2011 and 2016

	Number of Employed Persons		% of Total (% of Scenic Rim RC)	
	2011	2016	2011	2016
Beaudesert catchment	3,848	4,125	27.8%	29.1%
Balance of Beaudesert SA2	1,951	1,856	14.1%	13.1%
Beaudesert SA2	5,799	5,982	41.9%	42.2%
Boonah / Kalbar catchment	2,156	2,274	15.6%	16.0%
Balance of Boonah SA2	1,703	1,613	12.3%	11.4%
Boonah SA2	3,859	3,886	27.9%	27.4%
Tamborine Mountain / Tamborine Village catchment	2,853	2,925	20.6%	20.6%
Canungra catchment	1,313	1,382	9.5%	9.8%
Tamborine – Canungra SA2	4,166	4,307	30.1%	30.4%
Scenic Rim Regional Council	13,824	14,171	100.0%	100.0%

Source: 2016 Census of Population and Housing (2017), 2011 Census of Population and Housing (2012) and Queensland Treasury Employment Projections by Local Government Area (2018)

2.2 Historic Employment by Industry

2.2.1 Scenic Rim LGA

As previously detailed in Table 2.1, as of the past two Censuses the Beaudesert SA2 has accounted for the largest proportion of Scenic Rim LGA's workforce. This is primary due to the large volume of health care and social assistance workers in the Beaudesert SA2, which account for over half of the LGA's workers in this industry. Additionally, the Beaudesert SA2 accounts for over half of the LGA's workers in the mining, manufacturing and electricity, gas, water and waste services employment in both 2011 and 2016.

The largest employing industry in the Boonah SA2 (by volume of workers) is the agriculture, forestry and fishing industry. Employment in this industry accounted for more than half of Scenic Rim LGA's employment in agriculture, forestry in fishing in 2016.

With the Tamborine – Canungra SA2, the two largest employing industries in 2016 were accommodation and food services, followed by public administration and safety workers. Employment in these industries represented 50.1% and 45.0% of Scenic Rim LGA's employment in these sectors.

Table 2.2 below summarises the historic employment by industry for the three SA2s within Scenic Rim LGA as of the 2011 and 2016 Censuses.

Table 2.2 Summary of Historic Employment by Study Area, 2011 and 2016

	2011				2016			
	Beaudesert SA2	Boonah SA2	Tamborine – Canungra SA2	Scenic Rim LGA	Beaudesert SA2	Boonah SA2	Tamborine – Canungra SA2	Scenic Rim LGA
Total Employed Persons								
Agriculture, Forestry and Fishing	664	836	242	1,742	564	778	208	1,550
Mining	75	4	14	94	44	18	23	85
Manufacturing	476	192	192	860	487	203	202	893
Electricity, Gas, Water and Waste Services	87	47	26	160	86	38	25	149
Construction	496	444	426	1,365	521	332	363	1,216
Wholesale Trade	134	178	58	370	121	163	51	334
Retail Trade	598	402	435	1,435	646	414	436	1,496
Accommodation and Food Services	375	288	673	1,336	495	289	786	1,570
Transport, Postal and Warehousing	205	178	97	480	176	166	100	442
Information Media and Telecommunications	90	17	41	148	53	8	79	140
Financial and Insurance Services	69	46	30	145	72	93	30	194
Rental, Hiring and Real Estate Services	69	38	95	201	58	24	91	173
Professional, Scientific and Technical Services	165	97	281	543	187	129	260	577
Administrative and Support Services	100	42	182	324	107	58	130	294
Public Administration and Safety	469	125	431	1,025	480	111	484	1,075
Education and Training	556	336	385	1,276	537	374	467	1,379
Health Care and Social Assistance	846	381	288	1,515	991	455	318	1,764
Arts and Recreation Services	97	44	110	252	108	50	95	253
Other Services	229	164	160	553	246	185	160	591
Total persons employed	5,799	3,859	4,166	13,824	5,982	3,886	4,307	14,175
Proportion of LGA (%)								
Agriculture, Forestry and Fishing	38.1%	48.0%	13.9%	100.0%	36.4%	50.2%	13.4%	100.0%
Mining	80.0%	4.6%	15.4%	100.0%	51.8%	21.4%	26.8%	100.0%
Manufacturing	55.3%	22.3%	22.3%	100.0%	54.6%	22.8%	22.6%	100.0%
Electricity, Gas, Water and Waste Services	54.5%	29.4%	16.1%	100.0%	58.0%	25.2%	16.8%	100.0%
Construction	36.3%	32.5%	31.2%	100.0%	42.8%	27.3%	29.9%	100.0%
Wholesale Trade	36.3%	48.1%	15.6%	100.0%	36.1%	48.7%	15.2%	100.0%

	2011				2016			
	Beaudesert SA2	**Boonah SA2**	**Tamborine – Canungra SA2**	**Scenic Rim LGA**	**Beaudesert SA2**	**Boonah SA2**	**Tamborine – Canungra SA2**	**Scenic Rim LGA**
Retail Trade	41.7%	28.0%	30.3%	100.0%	43.2%	27.6%	29.1%	100.0%
Accommodation and Food Services	28.1%	21.6%	50.4%	100.0%	31.5%	18.4%	50.1%	100.0%
Transport, Postal and Warehousing	42.7%	37.2%	20.2%	100.0%	39.9%	37.5%	22.6%	100.0%
Information Media and Telecommunications	60.6%	11.4%	28.0%	100.0%	38.2%	5.6%	56.2%	100.0%
Financial and Insurance Services	47.7%	31.8%	20.5%	100.0%	37.0%	47.8%	15.2%	100.0%
Rental, Hiring and Real Estate Services	34.1%	18.8%	47.1%	100.0%	33.7%	14.0%	52.3%	100.0%
Professional, Scientific and Technical Services	30.4%	17.8%	51.7%	100.0%	32.5%	22.4%	45.1%	100.0%
Administrative and Support Services	30.8%	13.0%	56.3%	100.0%	36.3%	19.6%	44.1%	100.0%
Public Administration and Safety	45.8%	12.1%	42.1%	100.0%	44.7%	10.3%	45.0%	100.0%
Education and Training	43.5%	26.3%	30.1%	100.0%	39.0%	27.1%	33.9%	100.0%
Health Care and Social Assistance	55.8%	25.2%	19.0%	100.0%	56.2%	25.8%	18.0%	100.0%
Arts and Recreation Services	38.7%	17.5%	43.8%	100.0%	42.9%	19.6%	37.5%	100.0%
Other Services	41.4%	29.6%	28.9%	100.0%	41.7%	31.3%	27.0%	100.0%
Total persons employed	41.9%	27.9%	30.1%	100.0%	42.2%	27.4%	30.4%	100.0%

Note: Shifts in employment share must be interpreted with caution for industry sectors which accounted for only a small share of total employment (e.g. mining and information media and telecommunications).
Source: 2016 Census of Population and Housing (2017), 2011 Census of Population and Housing (2012) and Queensland Treasury Employment Projections by Local Government Area (2018)

2.2.2 Boonah SA2

As of 2011 the Boonah SA2 had a working population totalling 3,859 workers. Notably, of these workers, 2,156 (or 55.9% of the SA2s workers) worked within the Boonah / Kalbar catchment. The largest employing industries within the Boonah / Kalbar catchment were health care and social assistance. Within the broader Boonah SA2, the most significant employing industries in 2011 were agriculture, forestry and fishing and construction.

As of the 2011 Census, all employment in information media and telecommunications was within the Boonah / Kalbar catchment and all employment in mining was understandably within the balance area of the Boonah SA2.

Between the 2011 and 2016 Censuses the largest increase in employment (volume) within the Boonah / Kalbar catchment was within the agriculture, forestry and fishing industry, making it the second largest employing industry in the catchment. Employment in health care and social assistance remained the most significant employing industry in 2016.

With respect to the SA2 as a whole, whilst employment in agriculture, forestry and fishing remained significant, there was a sizeable increase in the incidence of employment in health care and social assistance, education and training and professional, scientific and technical services between the two Censuses.

Employment in each of the Boonah Study Areas as of 2016 is as follows:

+ Boonah / Kalbar catchment: 2,274 workers or 58.5% of the SA2's working population;
+ Balance Boonah SA2: 1,613 workers or 41.5% of the SA2's working population; and
+ Boonah SA2: total working population of 3,886.

Table 2.3 details the baseline employment for the Boonah / Kalbar catchment, Boonah SA2 and Balance Area for 2011 and 2016.

Table 2.3 Employment by Study Area, Boonah SA2, 2011 and 2016

	2011			2016		
	Boonah / Kalbar catchment	Balance Boonah SA2	Boonah SA2 Total	Boonah / Kalbar catchment	Balance Boonah SA2	Boonah SA2 Total
Total Employed Persons						
Agriculture, Forestry and Fishing	265	571	836	266	512	778
Mining	0	4	4	0	18	18
Manufacturing	68	124	192	68	135	203
Electricity, Gas, Water and Waste Services	23	23	47	23	15	38
Construction	198	245	444	139	193	332
Wholesale Trade	111	67	178	119	43	163
Retail Trade	289	113	402	324	90	414
Accommodation and Food Services	184	104	288	182	107	289
Transport, Postal and Warehousing	104	74	178	84	81	166
Information Media and Telecommunications	17	0	17	8	0	8
Financial and Insurance Services	41	5	46	60	32	93
Rental, Hiring and Real Estate Services	28	9	38	24	0	24
Professional, Scientific and Technical Services	61	36	97	81	48	129
Administrative and Support Services	12	30	42	32	26	58
Public Administration and Safety	78	47	125	94	17	111

	2011			2016		
	Boonah / Kalbar catchment	Balance Boonah SA2	Boonah SA2 Total	Boonah / Kalbar catchment	Balance Boonah SA2	Boonah SA2 Total
Education and Training	214	122	336	222	153	374
Health Care and Social Assistance	318	64	381	399	56	455
Arts and Recreation Services	17	27	44	14	36	50
Other Services	127	37	164	135	50	185
Total persons employed	2,156	1,703	3,859	2,274	1,613	3,886
Proportion of SA2 (%)						
Agriculture, Forestry and Fishing	34.2%	65.8%	100.0%	34.2%	65.8%	100.0%
Mining	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%
Manufacturing	33.6%	66.4%	100.0%	33.6%	66.4%	100.0%
Electricity, Gas, Water and Waste Services	60.0%	40.0%	100.0%	60.0%	40.0%	100.0%
Construction	42.0%	58.0%	100.0%	42.0%	58.0%	100.0%
Wholesale Trade	73.4%	26.6%	100.0%	73.4%	26.6%	100.0%
Retail Trade	78.3%	21.7%	100.0%	78.3%	21.7%	100.0%
Accommodation and Food Services	63.0%	37.0%	100.0%	63.0%	37.0%	100.0%
Transport, Postal and Warehousing	50.9%	49.1%	100.0%	50.9%	49.1%	100.0%
Information Media and Telecommunications	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%
Financial and Insurance Services	65.2%	34.8%	100.0%	65.2%	34.8%	100.0%
Rental, Hiring and Real Estate Services	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%
Professional, Scientific and Technical Services	62.6%	37.4%	100.0%	62.6%	37.4%	100.0%
Administrative and Support Services	55.0%	45.0%	100.0%	55.0%	45.0%	100.0%
Public Administration and Safety	84.8%	15.2%	100.0%	84.8%	15.2%	100.0%
Education and Training	59.2%	40.8%	100.0%	59.2%	40.8%	100.0%
Health Care and Social Assistance	87.7%	12.3%	100.0%	87.7%	12.3%	100.0%
Arts and Recreation Services	27.3%	72.7%	100.0%	27.3%	72.7%	100.0%
Other Services	72.7%	27.3%	100.0%	72.7%	27.3%	100.0%
Total persons employed	58.5%	41.5%	100.0%	58.5%	41.5%	100.0%

Note: Shifts in employment share must be interpreted with caution for industry sectors which accounted for only a small share of total employment (e.g. mining and information media and telecommunications).
Source: 2016 Census of Population and Housing (2017), 2011 Census of Population and Housing (2012) and Queensland Treasury Employment Projections by Local Government Area (2018)

2.2.3 Beaudesert SA2

As of 2011, Employment in the Beaudesert SA2 totalled 3,859 workers and was most significant in the following industries:

+ Health care and social assistance: total of 991 workers in the SA2, 96.8% of which were located within the Beaudesert catchment;
+ Retail trade: 646 workers in the SA2, 88.3% of which were located within the Beaudesert catchment; and
+ Agriculture forestry and fishing: total of 564 workers in the SA2, 89.5% of which were located within the Balance Area.

Between the 2011 and 2016 Censuses, the most significant change to employment within the Beaudesert SA2 was in the health care and social assistance industry, with growth of 145 workers over the five-year period. There was also notable accommodation and food services employment growth in the balance area over the same period.

Whilst agriculture, forestry and fishing remained a key industry sector within Beaudesert SA2, employment within the sector fell by 100 persons between the 2011 and 2016 Censuses.

Employment in each of the Beaudesert Study Areas as of 2016 is as follows:

+ Beaudesert catchment: 4,125 workers or 69.0% of the SA2's working population;
+ Balance Beaudesert SA2: 1,856 workers or 31.0% of the SA2's working population; and
+ Beaudesert SA2: total working population of 5,982 workers.

Table 2.4 details the baseline employment for the Beaudesert catchment, Beaudesert SA2 and Balance Area for 2011 and 2016.

Table 2.4 Employment by Study Area, Beaudesert SA2, 2011 and 2016

	2011			2016		
	Beaudesert catchment	Balance Beaudesert SA2	Beaudesert SA2 Total	Beaudesert catchment	Balance Beaudesert SA2	Beaudesert SA2 Total
Total Employed Persons						
Agriculture, Forestry and Fishing	66	597	664	59	505	564
Mining	13	62	75	14	30	44
Manufacturing	221	254	476	194	294	487
Electricity, Gas, Water and Waste Services	76	11	87	75	11	86
Construction	303	193	496	316	205	521
Wholesale Trade	98	36	134	94	27	121
Retail Trade	490	108	598	571	76	646
Accommodation and Food Services	297	78	375	358	137	495
Transport, Postal and Warehousing	107	98	205	94	82	176
Information Media and Telecommunications	84	6	90	42	11	53
Financial and Insurance Services	54	15	69	62	10	72
Rental, Hiring and Real Estate Services	50	19	69	40	18	58
Professional, Scientific and Technical Services	122	43	165	126	62	187
Administrative and Support Services	61	39	100	60	47	107
Public Administration and Safety	404	65	469	435	46	480
Education and Training	367	189	556	365	173	537
Health Care and Social Assistance	795	51	846	960	31	991
Arts and Recreation Services	62	35	97	47	61	108
Other Services	179	51	229	215	31	246
Total persons employed	3,848	1,951	5,799	4,125	1,856	5,982
Proportion of SA2 (%)						
Agriculture, Forestry and Fishing	10.0%	90.0%	100.0%	10.5%	89.5%	100.0%
Mining	17.3%	82.7%	100.0%	31.0%	69.0%	100.0%
Manufacturing	46.5%	53.5%	100.0%	39.8%	60.2%	100.0%
Electricity, Gas, Water and Waste Services	87.2%	12.8%	100.0%	87.0%	13.0%	100.0%
Construction	61.1%	38.9%	100.0%	60.6%	39.4%	100.0%
Wholesale Trade	73.3%	26.7%	100.0%	77.9%	22.1%	100.0%

	2011			2016		
	Beaudesert catchment	Balance Beaudesert SA2	Beaudesert SA2 Total	Beaudesert catchment	Balance Beaudesert SA2	Beaudesert SA2 Total
Retail Trade	82.0%	18.0%	100.0%	88.3%	11.7%	100.0%
Accommodation and Food Services	79.1%	20.9%	100.0%	72.4%	27.6%	100.0%
Transport, Postal and Warehousing	52.1%	47.9%	100.0%	53.3%	46.7%	100.0%
Information Media and Telecommunications	93.8%	6.3%	100.0%	79.4%	20.6%	100.0%
Financial and Insurance Services	77.8%	22.2%	100.0%	86.3%	13.7%	100.0%
Rental, Hiring and Real Estate Services	72.4%	27.6%	100.0%	69.0%	31.0%	100.0%
Professional, Scientific and Technical Services	73.7%	26.3%	100.0%	67.1%	32.9%	100.0%
Administrative and Support Services	60.9%	39.1%	100.0%	55.9%	44.1%	100.0%
Public Administration and Safety	86.1%	13.9%	100.0%	90.5%	9.5%	100.0%
Education and Training	66.0%	34.0%	100.0%	67.9%	32.1%	100.0%
Health Care and Social Assistance	94.0%	6.0%	100.0%	96.8%	3.2%	100.0%
Arts and Recreation Services	64.0%	36.0%	100.0%	43.3%	56.7%	100.0%
Other Services	77.9%	22.1%	100.0%	87.3%	12.7%	100.0%
Total persons employed	66.4%	33.6%	100.0%	69.0%	31.0%	100.0%

Note: Shifts in employment share must be interpreted with caution for industry sectors which accounted for only a small share of total employment (e.g. mining and information media and telecommunications).
Source: 2016 Census of Population and Housing (2017), 2011 Census of Population and Housing (2012) and Queensland Treasury Employment Projections by Local Government Area (2018)

2.2.4 Tamborine – Canungra SA2

Note that the Tamborine – Canungra SA2 consists of two DZN's which represent the two catchments of Tamborine Mountain / Tamborine Village and Canungra.

As of 2011 the Tamborine - Canungra SA2 had a working population totalling 4,166 workers. Notably, over two thirds of these workers were employed in the Tamborine Mountain / Tamborine Village catchment (as opposed to the Canungra catchment). The most significant employing industries in each catchment and the SA2 as a whole in 2011 were as follows:

+ Canungra catchment: public administration and safety represented almost a third of the workforce;
+ Tamborine Mountain / Tamborine Village catchment: employment in accommodation and food services accounted for 16.3% of employment; and
+ Tamborine - Canungra SA2: 16.1% of total employment attributable to accommodation and food services.

Notably, as of 2011, 69.2% of all employment within the accommodation and food services industry was within the Tamborine Mountain / Tamborine Village catchment.

Employment in each of the Tamborine - Canungra SA2 study areas as of 2016 is as follows:

+ Canungra catchment: 1,382 persons or 32.1% of the SA2's total working population;
+ Tamborine Mountain / Tamborine Village catchment: 2,925 workers or 67.9% of the SA2's total working population; and
+ Tamborine - Canungra SA2: total of 4,307 workers in the SA2 as of the 2016 Census.

Table 2.5 details the baseline employment for the Canungra catchment, Tamborine Mountain / Tamborine Village catchment and Tamborine - Canungra SA2 for 2011 and 2016.

Table 2.5 Employment by Study Area, Tamborine – Canungra SA2, 2011 and 2016

	2011			2016		
	Canungra catchment	Tamborine Mountain / Tamborine Village catchment	Tamborine-Canungra SA2 Total	Canungra catchment	Tamborine Mountain / Tamborine Village catchment	Tamborine - Canungra SA2 Total
Total Employed Persons						
Agriculture, Forestry and Fishing	66	176	242	67	141	208
Mining	0	14	14	6	17	23
Manufacturing	52	140	192	26	176	202
Electricity, Gas, Water and Waste Services	12	13	26	4	21	25
Construction	81	344	426	90	273	363
Wholesale Trade	14	44	58	4	47	51
Retail Trade	88	347	435	94	342	436
Accommodation and Food Services	207	465	673	301	485	786
Transport, Postal and Warehousing	10	87	97	17	83	100
Information Media and Telecommunications	11	30	41	6	72	79
Financial and Insurance Services	9	21	30	6	24	30
Rental, Hiring and Real Estate Services	20	74	95	20	70	91
Professional, Scientific and Technical Services	57	224	281	45	215	260
Administrative and Support Services	89	93	182	58	72	130
Public Administration and Safety	399	33	431	450	34	484
Education and Training	96	289	385	93	374	467
Health Care and Social Assistance	50	238	288	47	271	318
Arts and Recreation Services	18	92	110	17	78	95
Other Services	33	127	160	31	129	160
Total persons employed	1,313	2,853	4,166	1,382	2,925	4,307
Proportion of SA2 (%)						
Agriculture, Forestry and Fishing	27.3%	72.7%	100.0%	32.2%	67.8%	100.0%
Mining	0.0%	100.0%	100.0%	26.7%	73.3%	100.0%
Manufacturing	27.2%	72.8%	100.0%	12.8%	87.2%	100.0%
Electricity, Gas, Water and Waste Services	47.8%	52.2%	100.0%	15.0%	85.0%	100.0%
Construction	19.1%	80.9%	100.0%	24.8%	75.2%	100.0%
Wholesale Trade	24.0%	76.0%	100.0%	7.5%	92.5%	100.0%
Retail Trade	20.2%	79.8%	100.0%	21.5%	78.5%	100.0%
Accommodation and Food Services	30.8%	69.2%	100.0%	38.3%	61.7%	100.0%
Transport, Postal and Warehousing	10.4%	89.6%	100.0%	16.7%	83.3%	100.0%
Information Media and Telecommunications	27.0%	73.0%	100.0%	8.0%	92.0%	100.0%
Financial and Insurance Services	29.6%	70.4%	100.0%	19.0%	81.0%	100.0%
Rental, Hiring and Real Estate Services	21.3%	78.8%	100.0%	22.2%	77.8%	100.0%
Professional, Scientific and Technical Services	20.4%	79.6%	100.0%	17.2%	82.8%	100.0%
Administrative and Support Services	48.7%	51.3%	100.0%	44.4%	55.6%	100.0%

	2011			2016		
	Canungra catchment	Tamborine Mountain / Tamborine Village catchment	Tamborine-Canungra SA2 Total	Canungra catchment	Tamborine Mountain / Tamborine Village catchment	Tamborine - Canungra SA2 Total
Public Administration and Safety	92.4%	7.6%	100.0%	93.0%	7.0%	100.0%
Education and Training	24.8%	75.2%	100.0%	20.0%	80.0%	100.0%
Health Care and Social Assistance	17.3%	82.7%	100.0%	14.8%	85.2%	100.0%
Arts and Recreation Services	16.5%	83.5%	100.0%	18.1%	81.9%	100.0%
Other Services	20.8%	79.2%	100.0%	19.5%	80.5%	100.0%
Total persons employed	31.5%	68.5%	100.0%	32.1%	67.9%	100.0%

Note: Shifts in employment share must be interpreted with caution for industry sectors which accounted for only a small share of total employment (e.g. mining and information media and telecommunications).
Source: 2016 Census of Population and Housing (2017), 2011 Census of Population and Housing (2012) and Queensland Treasury Employment Projections by Local Government Area (2018)

2.3 Significance of Rural Production in Scenic Rim

Section 2.2 identifies that the agriculture, forestry and fishing sector is a significant contributor to employment within Scenic Rim, particularly within the rural areas of Boonah and Beaudesert.

The latest available agricultural production data at an LGA wide and SA2 level is from the 2015-16 Agricultural Census, published by the Australian Bureau of Statistics (ABS catalogue numbers 7121.0 and 7503.0). This section provides an overview of the contribution of agricultural production within Scenic Rim and its component SA2 both in terms of the volume and value of production.

2.3.1 Volume of Agricultural Commodities

Agricultural production, with respect to production volumes, within Scenic Rim LGA has historically been most concentrated in hay and silage production, followed by vegetable production. Additionally, between 2010-11 and 2015-16 Scenic Rim recorded a significant increase in livestock production volumes and a minor decrease in the volume of fruit and nuts produced in the LGA. In 2010-11, Scenic Rim LGA produced over 90.0% of the State's kiwifruits, however this decreased to nil in 2015-16.

Also, of significance to the agriculture, forestry and fishing sector as of 2010-11 and 2015-16 was the farming of livestock within Scenic Rim Regional Council. Between these two years, the proportion of Queensland's livestock attributable to the LGA increased from 5.4% in 2010-11 to 10.7% in 2015-16. In both 2010-11 and 2015-16 the largest contributor to livestock production in the region resulted from the volume of meat chickens, followed by meat cattle which combined accounted for over 90.0% of all livestock production from the LGA. Overall, the production of meat chickens from the Scenic Rim LGA accounted for 17.6% of all Queensland meat chickens in 2015-16.

Other production from Scenic Rim LGA of significance to the State's total production volumes included:

+ Carrot production in the LGA accounted for 83.4% of the State's total production of carrots in 2015-16, having increased from 64.5% in 2010-11;
+ Over a third of all onions produced in Queensland originated from Scenic Rim LGA in 2015-16, almost double the proportion recorded for 2010-11; and
+ 13.8% of Queensland's lucerne cut for hay was grown in Scenic Rim LGA in 2015-16.

Table 2.6 details the agricultural production volumes from Scenic Rim Regional Council in 2010-11 and 2015-16.

Table 2.6 Volume of Agricultural Production – Scenic Rim LGA and Queensland, 2010-11 and 2015-16

	2010-11			2015-16		
	Scenic Rim LGA Volume	% of Scenic Rim LGA Production	% of Queensland Production	Scenic Rim LGA Volume	% of Scenic Rim LGA Production	% of Queensland Production
Broadacre Crops (t)						
Maize for grain	3,006	23.2%	1.8%	4,437	25.5%	2.7%
Oilseeds - Other oilseeds	0	0.0%	0.0%	1,226	7.0%	8.5%
Barley for grain	1,419	10.9%	1.0%	1,214	7.0%	0.3%
Wheat for grain	0	0.0%	0.0%	713	4.1%	0.1%
Sorghum for Grain	533	4.1%	0.0%	512	2.9%	0.0%
Remainder of Broadacre Crop Production	8,023	61.8%	-	9,321	53.5%	-
Total	12,981	100.0%	0.0%	17,423	100.0%	0.0%
Hay & Silage (t)						
Pasture (including lucerne), cereal and other crops cut for silage	54,460	80.8%	0.0%	65,527	61.5%	11.7%
Lucerne cut for hay	0	0.0%	0.0%	23,838	22.4%	13.8%
Other pasture cut for hay	0	0.0%	0.0%	8,799	8.3%	6.1%
Cereal cut for hay	1,029	1.5%	1.4%	3,501	3.3%	2.3%
Other crops cut for hay	5,941	8.8%	5.7%	2,413	2.3%	3.0%
Remainder of Hay and Silage Production	5,941	8.8%	-	2,413	2.3%	-
Total	67,371	100.0%	7.2%	106,490	100.0%	9.0%
Fruit and Nuts (t)						
Pineapples	0	0.0%	0.0%	55	10.5%	0.1%
Grapes	0	0.0%	0.0%	5	0.9%	0.0%
Kiwifruit	527	69.3%	90.3%	0	0.0%	0.0%
Avocados	226	29.7%	1.1%	0	0.0%	0.0%
Remainder of Fruit and Nuts Production	8	1.0%	-	459	88.5%	-
Total	761	100.0%	0.1%	519	100.0%	0.1%
Vegetables (t)						
Carrots	15,980	46.0%	64.5%	36,506	67.5%	83.4%
Onions	6,126	17.6%	16.5%	11,536	21.3%	35.6%
Pumpkins	4,104	11.8%	10.0%	2,843	5.3%	6.5%
Sweet Corn	1,241	3.6%	4.8%	1,515	2.8%	2.7%
Beans	2,477	7.1%	0.0%	1,378	2.5%	0.0%
Remainder of Vegetable Production	4,821	13.9%	-	344	0.6%	-
Total	34,749	100.0%	4.2%	54,122	100.0%	0.0%
Livestock (no.)						

	2010-11			2015-16		
	Scenic Rim LGA Volume	% of Scenic Rim LGA Production	% of Queensland Production	Scenic Rim LGA Volume	% of Scenic Rim LGA Production	% of Queensland Production
Meat chickens	2,303,014	89.6%	14.5%	3,249,450	96.7%	17.6%
Meat cattle	112,941	4.4%	0.9%	87,865	2.6%	0.8%
Dairy cattle	9,034	0.4%	0.0%	20,152	0.6%	13.0%
Pigs	2,297	0.1%	0.4%	2,911	0.1%	0.5%
Sheeps and lambs	2,171	0.1%	0.0%	1,298	0.0%	0.1%
Remainder Livestock	141,120	5.5%	-	0	0.0%	-
Total	2,570,577	100.0%	5.4%	3,361,677	100.0%	10.7%

Source: Australian Bureau of Statistics Agricultural Commodities, Australia (2010-11 and 2015-16), Cat. No. 7121.0

As of 2010-11 the majority of agricultural production in Scenic Rim was generated within the Beaudesert SA2 and was primarily driven by the volume of livestock in the area. Most commodities, however, were produced in the Boonah SA2, accounting for 99.5% of Scenic Rim's vegetable production, 46.2% of hay and silage and over a third of all broadacre crop production.

Between 2010-11 and 2015-16, there was however, a shift in the composition of production volumes in Scenic Rim. In 2015-16, under the five high-level production categories, production was most significant in the following areas:

+ Broadacre Crops: Tamborine – Canungra SA2 accounted for half of production, followed by Boonah SA2;
+ Hay and Silage: 53.4% produced in the Beaudesert SA2, followed by the Boonah SA2, with the Tamborine – Canungra accounting for less than 1.0%;
+ Fruit and Nuts: 88.5% of fruit and nuts were produced in Tamborine – Canungra SA2, with the bulk of the remaining produced in the Boonah SA2;
+ Vegetables: Boonah SA2 represented 99.5% of Scenic Rim LGA's vegetable production; and
+ Livestock: Beaudesert represented 56.0% of livestock produce, followed by the Boonah SA2 (43.9%).

Table 2.7 details the agricultural production volumes from Scenic Rim Regional Council, by SA2, in 2010-11 and 2015-16.

Table 2.7 Volume of Agricultural Production – Boonah SA2, Beaudesert SA2 and Scenic Rim LGA, 2010-11 and 2015-16

	Boonah		Beaudesert		Tamborine - Canungra		Scenic Rim LGA	
	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16
Production Volumes								
Broadacre Crops (t)	9,277	5,941	3,704	2,739	0	8,743	12,981	17,423
Hay & Silage (t)	30,091	49,185	37,182	56,824	98	481	67,371	106,490
Fruit and Nuts (t)	4	55	24	5	734	459	761	519
Vegetables (t)	32,699	53,827	451	295	1,600	0	34,749	54,122
Livestock (no.)	1,006,835	1,474,802	1,552,437	1,883,400	11,305	3,475	2,570,577	3,361,677

	Boonah		Beaudesert		Tamborine - Canungra		Scenic Rim LGA	
	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16
Proportion of Production								
Broadacre Crops	71.5%	34.1%	28.5%	15.7%	0.0%	50.2%	100.0%	100.0%
Hay & Silage	44.7%	46.2%	55.2%	53.4%	0.1%	0.5%	100.0%	100.0%
Fruit and Nuts	0.5%	10.5%	3.1%	0.9%	96.3%	88.5%	100.0%	100.0%
Vegetables	94.1%	99.5%	1.3%	0.5%	4.6%	0.0%	100.0%	100.0%
Livestock	39.2%	43.9%	60.4%	56.0%	0.4%	0.1%	100.0%	100.0%

Source: Australian Bureau of Statistics Agricultural Commodities, Australia (2010-11 and 2015-16), Cat. No. 7121.0

2.3.2 Value of Agricultural Commodities

Consistent with agricultural production volumes, the highest value agricultural export from Scenic Rim LGA has been from vegetable production, totaling $51.45 million in 2015-16. The production of carrots in the region yielded the highest value of production, accounting for 50.1% of the LGA's vegetable production value and 83.4% of Queensland's total value of carrot production in 2015-16.

Additionally, the notable increase in livestock production volumes translated to an increase in the value of livestock exports to $173.8 million in 2015-16. Within the livestock category, the highest value export from Scenic Rim LGA were meat chickens, the value of which accounted for 13.8% of the States total value of meat chicken production.

With respect to the value of production of each commodity across Queensland, other notable commodities included:

+ Kiwifruit production in Scenic Rim LGA represented over three quarters of the State's total agricultural value of kiwifruits;
+ Onion production in Scenic Rim LGA accounted for 35.6% of Queensland's total value of onion production in 2015-16;
+ 13.8% of the States value from lucerne cut for hay derived from production in the Scenic Rim LGA; and
+ The value of bean production in the Scenic Rim LGA represented over 6.0% of the States total value of bean production in 2015-16.

Table 2.8 below details the agricultural production values from Scenic Rim Regional Council in 2010-11 and 2015-16.

Table 2.8 Value of Agricultural Production ($m)– Scenic Rim LGA and Queensland, 2010-11 and 2015-16

	2010-11			2015-16		
	Scenic Rim LGA Value ($m)	% of Scenic Rim LGA Value	% of Queensland Value	Scenic Rim LGA Value ($m)	% of Scenic Rim LGA Value	% of Queensland Value
Broadacre Crops						
Maize for grain	0.70	33.3%	1.8%	1.41	28.8%	2.7%
Oilseeds	0.50	23.8%	4.9%	1.04	21.3%	0.0%
Barley for Grain	0.30	14.3%	1.1%	0.33	6.8%	0.3%
Wheat for Grain	0.20	9.5%	0.1%	0.21	4.3%	0.1%
Sorghum for Grain	0.10	4.8%	0.0%	0.14	2.8%	0.0%
Remainder of Broadacre Crop Production	0.30	14.3%	-	1.76	36.1%	-
Total	2.10	100.0%	0.1%	4.89	100.0%	0.1%

	2010-11			2015-16		
	Scenic Rim LGA Value ($m)	% of Scenic Rim LGA Value	% of Queensland Value	Scenic Rim LGA Value ($m)	% of Scenic Rim LGA Value	% of Queensland Value
Hay & Silage						
Pasture cut for hay	8.10	84.4%	11.2%	9.31	86.8%	11.1%
Cereal cut for hay	0.20	2.1%	1.2%	0.84	7.8%	2.3%
Other crops cut for hay	1.30	13.5%	5.8%	0.58	5.4%	3.0%
Total	9.60	100.0%	8.6%	10.72	100.0%	7.7%
Fruit and Nuts						
Avocados	0.60	26.1%	1.1%	0.93	46.5%	0.6%
Kiwifruit	1.40	60.9%	93.3%	0.79	39.4%	76.4%
Olives	0.00	0.0%	0.0%	0.00	0.0%	0.0%
Pineapples	0.00	0.0%	0.0%	0.04	1.9%	0.1%
Limes	0.00	0.0%	0.0%	0.01	0.5%	0.0%
Remainder of Fruit and Nuts Production	0.30	13.0%	-	0.24	12.1%	-
Total	2.30	100.0%	0.3%	2.01	100.0%	0.1%
Vegetables						
Carrots	8.70	24.0%	64.4%	25.79	50.1%	83.4%
Onions	5.80	16.0%	16.5%	9.65	18.8%	35.6%
Beans	10.60	29.3%	11.2%	6.44	12.5%	6.6%
Sweet Corn	1.70	4.7%	4.7%	2.37	4.6%	2.7%
Pumpkins	2.50	6.9%	9.7%	2.30	4.5%	6.5%
Remainder of Vegetable Production	6.90	19.1%	-	4.91	9.5%	-
Total	36.20	100.0%	3.4%	51.45	100.0%	7.2%
Livestock & Livestock Products						
Meat Poultry	46.00	36.7%	11.6%	81.42	46.8%	13.8%
Meat Cattle and Calves	41.50	33.1%	1.2%	59.41	34.2%	1.0%
Pigs	0.80	0.6%	0.4%	1.67	1.0%	0.5%
Goats	0.10	0.1%	0.3%	0.05	0.0%	0.1%
Whole Milk	36.70	29.3%	14.3%	31.21	18.0%	13.2%
Remainder Livestock	0.10	0.1%	-	0.04	0.0%	-
Total	125.20	100.0%	2.1%	173.80	100.0%	2.4%

Source: Australian Bureau of Statistics Value of Agricultural Commodities Produced (2010-11 and 2015-16), Cat. No. 7503.0

In both 2010-11 and 2015-16, the majority of agricultural production value in Scenic Rim LGA was derived from the Boonah SA2, accounting for 50.0% and 56.9% of total value in each year. This is largely due to this SA2 accounting for almost all vegetable production values in the LGA and approximately half of all livestock production (with respect to value).

Notably, between the two years analysed, the proportion of production value attributable to the Beaudesert SA2 decreased marginally from 42.6% to 40.8% in 2010-11 and 2015-16 respectively. The decline was evident across all five agricultural sub categories. The value of agricultural production from the Tamborine – Canungra SA2 also decreased between the two years, however the most significant decrease was in the value of production of vegetables.

Table 2.9 below details the agricultural production values from Scenic Rim Regional Council, by SA2, in 2010-11 and 2015-16.

Table 2.9 Value of Agricultural Production ($m) – Boonah SA2, Beaudesert SA2 and Scenic Rim LGA, 2010-11 and 2015-16

	Boonah		Beaudesert		Tamborine - Canungra		Scenic Rim LGA	
	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16	2010-11	2015-16
Value of Production ($m)								
Broadacre Crops	1.3	3.1	0.8	1.5	0.0	0.3	2.1	4.9
Hay & Silage	5.3	6.9	4.2	3.7	0.1	0.1	9.6	10.7
Fruit and Nuts	0.0	0.3	0.2	0.0	2.1	1.7	2.3	2.0
Vegetables	32.0	51.0	0.4	0.3	3.8	0.2	36.2	51.4
Livestock & Livestock Products	49.1	77.0	69.1	93.6	7.0	3.2	125.2	173.8
Total	87.7	138.2	74.7	99.1	13.0	5.5	175.4	242.9
Proportion of Value (%)								
Broadacre Crops	61.9%	63.2%	38.1%	30.1%	0.0%	6.7%	100.0%	100.0%
Hay & Silage	55.2%	64.5%	43.8%	34.5%	1.0%	1.0%	100.0%	100.0%
Fruit and Nuts	0.0%	13.3%	8.7%	0.3%	91.3%	86.4%	100.0%	100.0%
Vegetables	88.4%	99.1%	1.1%	0.5%	10.5%	0.4%	100.0%	100.0%
Livestock & Livestock Products	39.2%	44.3%	55.2%	53.9%	5.6%	1.8%	100.0%	100.0%
Total	50.0%	56.9%	42.6%	40.8%	7.4%	2.3%	100.0%	100.0%

Source: Australian Bureau of Statistics Value of Agricultural Commodities Produced (2010-11 and 2015-16), Cat. No. 7503.0

3 Employment Projections

Employment projections for each study area have been prepared, considering historic trends and the future growth outlook, aligning with the ShapingSEQ employment benchmark of an additional 7,610 jobs in Scenic Rim Regional Council between 2016 and 2041. The employment projections presented in this section of the report assume little take-up of industrial land within the Bromelton SDA to 2041, with Chapter 4 presenting a potential land take-up and employment scenario to 2041.

To estimate the projected employment by industry for the 2016 to 2041 period in Scenic Rim LGA, consideration has been given to publicly available data from the Australian Bureau of Statistics Census of Population and Housing employment by place of work trends in addition to employment estimates published by Queensland Treasury (2018). These employment estimates have been prepared at the single digit ANZSIC category.

3.1 Scenic Rim LGA

The Queensland Treasury's employment projections at the single-digit ANZSIC category level indicate that employment in the Scenic Rim LGA will increase from 13,824 workers in 2015-16 to 21,780 workers by 2040-41, representing an average annual growth rate in the order of 1.7% per annum. These projections also suggest that employment growth (in volume) over the projection period will be highest in the following industries:

+ Health care and social assistance: growing by 2.6% per annum over the projection period, with most growth anticipated to occur between 2026 and 2031;
+ Education and training: strong growth anticipated between 2021 and 2031, averaging a growth rate of 2.3% per annum over the projection period; and
+ Construction: average annual growth rate in employment of 2.3% per annum between 2016 and 2041 with the most significant increases to have occurred in the 2016-21 period.

Table 3.1 details the Queensland Treasury's employment projections (2016) by single-digit ANZSIC category for Scenic Rim LGA.

Table 3.1 Queensland Treasury Employment Projections – Scenic Rim LGA, 2016 to 2041

	2011	2016	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	1,742	1,550	1,480	1,446	1,418	1,397	1,385
Mining	94	85	99	132	179	236	297
Manufacturing	860	893	940	990	1,058	1,131	1,210
Electricity, Gas, Water and Waste Services	160	149	191	320	533	716	842
Construction	1,365	1,216	1,608	1,818	1,965	2,078	2,173
Wholesale Trade	370	334	347	358	370	383	396
Retail Trade	1,435	1,496	1,523	1,555	1,600	1,629	1,655
Accommodation and Food Services	1,336	1,570	1,630	1,737	1,851	1,972	2,097
Transport, Postal and Warehousing	480	442	466	498	535	568	604
Information Media and Telecommunications	148	140	141	147	155	162	170
Financial and Insurance Services	145	194	186	175	172	183	200
Rental, Hiring and Real Estate Services	201	173	208	247	290	333	383
Professional, Scientific and Technical Services	543	577	669	776	894	1,015	1,163
Administrative and Support Services	324	294	326	384	451	520	601

	2011	2016	2021	2026	2031	2036	2041
Public Administration and Safety	1,025	1,075	1,146	1,249	1,360	1,477	1,598
Education and Training	1,276	1,379	1,534	1,739	1,972	2,206	2,446
Health Care and Social Assistance	1,515	1,764	2,007	2,311	2,666	3,014	3,367
Arts and Recreation Services	252	253	266	285	306	330	356
Other Services	553	591	634	679	734	785	838
Total persons employed	13,824	14,171	15,402	16,844	18,510	20,136	21,780

Source: Queensland Treasury Employment Projections (2018)

3.2 Employment Projections by Study Area

Utilising the proportion of employment in each of the study areas, as established in Section 2, the employment projections prepared by the Queensland Treasury at the LGA wide (and single-digit ANZSIC category) can be apportioned to each area. When projecting employment within each study area, consideration was also given to the likely distribution of employment within the Scenic Rim LGA based on industry activity, available employment lands and historic growth trends. It is unlikely that historic growth trends (between 2011 and 2016) will continue to the end of the projection period, as such growth rates have been adjusted over the course of the projection period to reflect the slowing of employment growth as employment land in Scenic Rim LGA is taken up.

The process of attributing employment from the Scenic Rim projections (Queensland Treasury) to each study area is as follows:

+ Establish what proportion of Scenic Rim LGA's employment by single-digit ANZSIC category was attributable to the Boonah, Beaudesert and Tamborine-Canungra SA2s as of 2016 (baseline employment);
+ Assume that growth in employment by industry in each SA2 follows the same trajectory demonstrated in the 2011 to 2016 period to 2026, with adjustments made as necessary, particularly for those industry sectors where significant shifts were identified in the 2011 to 2016 period;
+ From 2026 onwards, assume an incremental decline in the shift in employment by industry, recogising that longer term employment trends are more difficult to accurately predict. This process yields a changing proportion of Scenic Rim LGA's employment attributable to each SA2 by single digit ANZSIC category; and
+ Apply these proportions (2016 to 2041 period) to the Queensland Treasury employment projections by single-digit ANZSIC category for the Scenic Rim LGA to yield employment projections by SA2.

A similar process has been followed to apportion SA2 employment projections to each of the study areas.

3.2.1 Boonah SA2

Employment within the Boonah SA2 is anticipated to increase from 3,886 workers in 2016 to 5,307 workers in 2041. The largest growth rate in employment is anticipated to be in the mining sector which is expected to average a growth rate of 6.5% per annum over the projection period. However, it is noted that the volume of workers in the mining industry is low (88 workers by 2041). With respect to the volume of workers in the Boonah SA2, the largest employing industry as of 2016 was the agriculture, forestry and fishing industry, however, by 2041 the largest employing industry is expected to be the health care and social assistance industry (totalling 885 workers by 2041).

Within the Boonah / Kalbar catchment, growth is expected to be most significant in administrative and support services employment, relative to other industries, following by employment growth in the electricity, gas, water and waste services. Employment in the health care and social assistance industry is also anticipated to demonstrate significant growth over the projection period, almost doubling from 399 workers in 2016 to 789 workers in 2041, making it the largest employing industry in both the catchment and the SA2 as a whole.

Consistent with historic uses, employment in the agriculture forestry and fishing industry is expected to account for the highest volume of workers in the Boonah balance area, however, is expected to demonstrate little to no growth between 2016 and 2041. The most significant employment growth is expected to be in the mining (6.5% per annum) and other services (3.6% per annum).

In total, employment in the Boonah / Kalbar catchment, Boonah Balance Area and the Boonah SA2 as a whole, is expected to increase as follows:

+ Boonah / Kalbar catchment: increase from 2,274 workers in 2016 to reach 3,258 workers in 2041;
+ Balance Boonah SA2: 1,613 workers in 2016 increasing to 2,049 workers in 2041; and
+ Boonah SA2: total working population to increase from 3,886 workers in 2016 to 5,307 workers in 2041.

Table 3.2 outlines the employment projections for the Boonah / Kalbar catchment, Boonah Balance Area and the Boonah SA2 at the single-digit ANZSIC category for the 2016 to 2041 period.

Table 3.2 Employment Projections by Study Area, Boonah SA2, 2016 to 2041

	Boonah / Kalbar catchment						Balance Boonah SA2						Boonah SA2 Total					
	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	266	269	278	284	287	289	512	506	511	513	514	513	778	775	789	797	801	802
Mining	0	0	0	0	0	0	18	24	35	50	69	88	18	24	35	50	69	88
Manufacturing	68	68	67	69	71	75	135	147	159	174	188	203	203	215	226	242	259	277
Electricity, Gas, Water and Waste Services	23	26	38	55	65	71	15	14	16	20	20	21	38	40	55	75	85	92
Construction	139	185	210	227	240	251	193	229	232	231	231	235	332	414	442	458	471	486
Wholesale Trade	119	144	169	184	191	198	43	26	8	0	0	0	163	170	177	184	191	198
Retail Trade	324	331	339	349	355	361	90	67	47	32	23	19	414	398	385	381	378	379
Accommodation and Food Services	182	171	165	163	166	172	107	105	106	108	112	118	289	277	272	272	278	289
Transport, Postal and Warehousing	84	78	70	65	61	61	81	101	126	150	170	186	166	179	196	215	231	247
Information Media and Telecommunications	8	8	9	9	10	10	0	0	0	0	0	0	8	8	9	9	10	10
Financial and Insurance Services	60	61	60	60	65	72	32	26	21	17	16	17	93	87	80	78	82	89
Rental, Hiring and Real Estate Services	24	28	32	37	42	48	0	0	0	0	0	0	24	28	32	37	42	48
Professional, Scientific and Technical Services	81	91	102	114	127	145	48	55	62	70	78	89	129	145	163	184	206	234
Administrative and Support Services	32	48	71	97	122	147	26	30	34	37	39	43	58	78	105	134	161	190
Public Administration and Safety	94	81	69	59	52	51	17	12	8	6	5	4	111	94	77	65	57	55
Education and Training	222	240	265	295	326	360	153	159	169	183	199	217	374	399	434	478	525	577
Health Care and Social Assistance	399	458	534	620	705	789	56	62	69	78	86	96	455	520	603	698	791	885
Arts and Recreation Services	14	9	3	0	0	0	36	46	57	67	73	79	50	55	61	67	73	79
Other Services	135	138	141	147	152	160	50	64	80	96	110	121	185	203	222	243	262	281
Total	2,274	2,435	2,622	2,834	3,038	3,258	1,613	1,674	1,741	1,833	1,934	2,049	3,886	4,109	4,363	4,667	4,972	5,307

Source: Bull & Bear Economics Assessment (2021)

3.2.2 Beaudesert SA2

Employment in the Beaudesert SA2 is anticipated to increase by 3,881 workers over the projection period, reaching a total workforce of 9,863 workers (the largest of the three SA2s) by 2041. With respect to the volume of workers, the most significant employing industry in the SA2 as of 2016 was the health care and social assistance industry. Over the projection period it is anticipated that the health care and social assistance industry will remain the largest employer in the SA2, however, the education and training industry and construction industry are also expected to grow significantly ultimately employing a similar incidence of workers in the SA2 by 2041.

The Beaudesert catchment is expected to demonstrate high growth in employment in mining (8.5% per annum) and electricity, gas, water and waste services (8.0% per annum) between 2016 and 2041. In line with historic trends in employment within the SA2, employment in the Beaudesert catchment will continue to be largest in the health care and social assistance industry, with no employment in this industry in the Beaudesert Balance Area by 2041.

Within the Beaudesert Balance Area, the strongest growth is expected to occur in the electricity, gas, water and waste services employment (8.3% per annum) reaching 86 workers by 2041. Notably, the manufacturing industry is expected to become the most significant employing industry in the area over the projection period. Manufacturing employment in the balance area is anticipated to increase from 294 workers in 2016 to 499 workers in 2041.

In total, employment in the Beaudesert catchment, Beaudesert Balance Area and the Beaudesert SA2 as a whole, is expected to increase as follows:

- Beaudesert catchment: increase from 4,125 workers in 2016 to reach 7,435 workers in 2041;
- Balance Beaudesert SA2: 1,856 workers in 2016 increasing to 2,427 workers in 2041; and
- Beaudesert SA2: total working population to increase from 5,982 workers in 2016 to 9,863 workers in 2041.

Table 3.3 outlines the employment projections for the Beaudesert catchment, Beaudesert Balance Area and the Beaudesert SA2 at the single-digit ANZSIC category for the 2016 to 2041 period.

Table 3.3 Employment Projections by Study Area, Beaudesert SA2, 2016 to 2041

	Beaudesert catchment						Balance Beaudesert SA2						Beaudesert SA2 Total					
	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	59	51	45	41	38	37	505	462	432	409	393	385	564	513	477	449	431	421
Mining	14	22	36	56	80	104	30	27	26	26	26	27	44	49	62	82	106	131
Manufacturing	194	164	133	112	99	96	294	334	375	419	460	499	487	498	509	531	560	594
Electricity, Gas, Water and Waste Services	75	102	182	315	435	519	11	16	28	50	69	83	86	118	210	365	505	602
Construction	316	466	578	664	730	777	205	297	361	409	445	471	521	762	939	1,073	1,175	1,248
Wholesale Trade	94	96	98	100	103	106	27	28	29	31	32	33	121	124	127	131	135	139
Retail Trade	571	618	663	678	689	699	76	35	0	0	0	0	646	653	663	678	689	699
Accommodation and Food Services	358	401	456	509	558	601	137	148	163	177	190	203	495	548	619	685	748	804
Transport, Postal and Warehousing	94	95	98	101	105	110	82	80	78	79	79	82	176	175	176	180	184	192
Information Media and Telecommunications	42	45	49	53	57	60	11	11	11	11	11	11	53	55	59	64	68	71
Financial and Insurance Services	62	67	69	69	74	82	10	4	0	0	0	0	72	71	69	69	74	82
Rental, Hiring and Real Estate Services	40	49	59	71	82	94	18	20	23	25	28	31	58	70	82	96	110	126
Professional, Scientific and Technical Services	126	161	204	250	295	344	62	73	86	99	112	128	187	235	290	349	407	473
Administrative and Support Services	60	71	89	109	129	151	47	53	62	73	83	96	107	124	151	182	212	247
Public Administration and Safety	435	458	493	517	545	581	46	25	3	0	0	0	480	483	496	517	545	581
Education and Training	365	442	542	648	750	845	173	193	216	241	266	293	537	635	758	890	1,016	1,138
Health Care and Social Assistance	960	1,113	1,271	1,454	1,635	1,822	31	3	0	0	0	0	991	1,116	1,271	1,454	1,635	1,822
Arts and Recreation Services	47	54	62	70	78	85	61	64	68	73	78	83	108	118	130	143	156	169
Other Services	215	249	270	287	303	322	31	8	0	0	0	0	246	258	270	287	303	322
Total	4,125	4,725	5,397	6,106	6,785	7,435	1,856	1,880	1,962	2,119	2,273	2,427	5,982	6,605	7,358	8,226	9,058	9,863

Source: Bull & Bear Economics Assessment (2021)

3.2.3 Tamborine – Canungra SA2

Within the Tamborine – Canungra SA2 total employment is anticipated to increase from 4,307 workers to 6,612 workers between 2016 and 2041. The strongest growth is anticipated to occur in the electricity, gas, water and waste services employment (7.4% per annum). In terms of the volume of workers, the accommodation and food services industry was the largest employer in the SA2, accounting for 786 workers. This is anticipated to remain the dominant industry of employment across the Tamborine – Canungra SA2 over the projection period.

Within the Canungra catchment, the most significant employing industry was the public administration and safety sector and as of 2016, this industry is anticipated to more than double to 916 employees by 2041. The Canungra catchment also recorded significant growth in the transport, postal and warehousing and electricity, gas, water and waste services over the projection period. However, it is noted that these industries are still anticipated to account for 2.0% of total employment in the catchment at 2041.

Employment in the Tamborine Mountain / Tamborine Village catchment is expected to remain significant in the accommodation and food services industry across the projection period. The strongest growth in employment within the Tamborine Mountain / Tamborine Village catchment is expected in the electricity, gas, water and waste services employment, recording an average annual growth rate in the order of 7.7%, however, will account for less than 150 workers at 2041.

In total, employment in the Canungra catchment, Tamborine Mountain / Tamborine Village catchment, Tamborine – Canungra SA2 as a whole, is expected to increase as follows:

+ Canungra catchment: increase from 1,382 workers in 2016 to reach 2,129 workers in 2041;
+ Tamborine Mountain / Tamborine Village catchment: 2,925 workers in 2016 increasing to 4,482 workers in 2041; and
+ Tamborine - Canungra SA2: total working population to increase from 4,307 workers in 2016 to 6,612 workers in 2041.

Table 3.4 outlines the employment projections for the Canungra catchment, Tamborine Mountain / Tamborine Village catchment, Tamborine – Canungra SA2 at the single-digit ANZSIC category for the 2016 to 2041 period.

Table 3.4 Employment Projections by Study Area, Tamborine – Canungra SA2, 2016 to 2041

	Canungra catchment						Tamborine Mountain / Tamborine Village catchment						Tamborine – Canungra SA2					
	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041	2016	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	67	64	62	61	60	59	141	127	117	110	105	103	208	191	180	171	165	162
Mining	6	8	11	16	22	28	17	19	24	31	40	49	23	26	35	47	62	77
Manufacturing	26	26	25	25	25	26	176	202	230	259	287	312	202	228	255	284	312	338
Electricity, Gas, Water and Waste Services	4	4	6	10	12	14	21	28	49	83	114	135	25	33	55	93	126	149
Construction	90	110	113	114	115	118	273	322	324	319	317	321	363	432	437	434	432	439
Wholesale Trade	4	4	4	4	4	4	47	49	50	51	53	55	51	52	54	55	57	59
Retail Trade	94	108	123	136	145	151	342	364	384	404	417	426	436	471	507	540	562	577
Accommodation and Food Services	301	303	312	324	340	358	485	502	535	570	607	645	786	805	847	894	946	1,003
Transport, Postal and Warehousing	17	26	37	48	57	64	83	86	89	93	96	101	100	111	126	141	153	165
Information Media and Telecommunications	6	6	6	6	6	6	72	71	73	76	78	82	79	77	79	82	85	88
Financial and Insurance Services	6	5	4	4	4	4	24	23	22	21	23	25	30	28	26	25	27	29
Rental, Hiring and Real Estate Services	20	24	28	33	37	43	70	86	104	124	144	166	91	110	133	157	181	209
Professional, Scientific and Technical Services	45	41	35	31	28	28	215	249	287	330	374	428	260	289	322	361	402	456
Administrative and Support Services	58	50	46	44	45	48	72	74	82	91	102	115	130	124	128	136	146	164
Public Administration and Safety	450	534	637	737	831	916	34	36	39	41	43	46	484	570	676	778	875	962
Education and Training	93	95	98	104	112	121	374	405	448	500	553	610	467	500	547	604	665	731
Health Care and Social Assistance	47	52	59	67	74	83	271	319	379	447	513	577	318	371	438	514	587	660
Arts and Recreation Services	17	18	19	20	21	23	78	76	76	77	80	85	95	93	94	97	101	108
Other Services	31	32	32	33	34	35	129	142	156	172	186	200	160	173	188	204	220	235
Total	1,382	1,507	1,658	1,817	1,973	2,129	2,925	3,180	3,466	3,800	4,132	4,482	4,307	4,687	5,125	5,617	6,105	6,612

Source: Bull & Bear Economics Assessment (2021)

4 Bromelton SDA Employment Projections

The employment baselines detailed in Section 3 assume only limited industrial land take-up within the Bromelton State Development Area (SDA) to 2041, and as such do not represent a scenario where the Bromelton SDA is significantly progressed. The Shaping SEQ employment baselines assume employment growth of 7,610 jobs in Scenic Rim to 2041, but it is understood that the Bromelton SDA has capacity for approximately 25,000 jobs at build out. This section details an alternative employment projection scenario for the balance of Beaudesert SA2, based on the establishment of catalytic project/s (i.e. Inland Rail and increased freight capacity of the Mount Lindesay Highway), which would subsequently drive industrial land take-up and hence employment within the Scenic Rim LGA.

4.1 Bromelton SDA Overview

Bromelton is located approximately six kilometres west of the town of Beaudesert. In the late 1990s, Bromelton was identified as having the potential to meet a range of regional industry needs in the form of intermodal and/or rail freight facilities and 'difficult to locate' or large footprint industry. A number of high impact industry activities relocated from Brisbane to Bromelton, including AJ Bush & Sons (rendering facility) and Gelita (manufacturers of gelatine) in the 1990s and remain operational. Other long established uses within the Bromelton SDA include the Beaudesert Central Waste Management Facility (operated by Scenic Rim Regional Council), Bromelton Quarry and Quickcell Technology Projects Pty Ltd (concrete manufacturers).

In 2008, the Queensland Government declared the Bromelton SDA, which comprises approximately 15,000 hectares of land, with an estimated employment capacity of 25,000 persons at build out.

The Bromelton SDA has four sub-precincts that are intended for significant employment opportunities, these being:

- Rail Dependent Industry Precinct
- Medium – High Impact Industry Precinct;
- Special Industry Precinct; and
- Bromelton Local Service Centre Precinct.

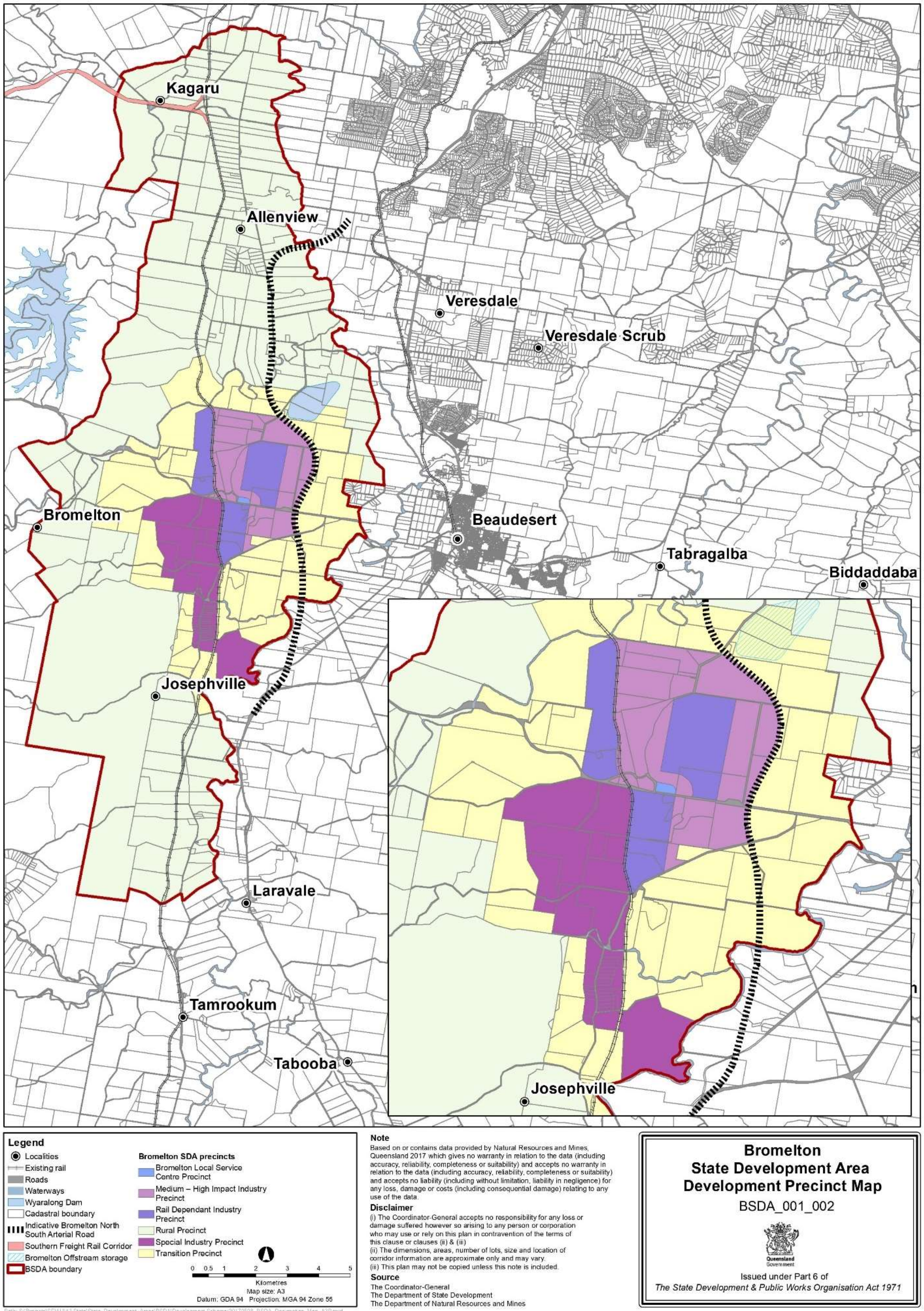
The SCT Logistics facility occupies the entirety of the site located immediately to the west of the rail line within the Rail Dependent Industry Precinct. It is understood that upon opening, the SCT Logistics facility employed 125 persons[1] and is expected to employ 1,000 persons upon build out. At present, it is anticipated that employment levels at the SCT Logistics facility have remained relatively stable since operations have commenced.

The Transition Precinct is anticipated to support limited employment opportunities, with supported activities including animal husbandry, animal keeping, aquaculture, cropping, extractive industry, intensive animal industry, intensive horticulture and rural industry.

Figure 4.1 provides an outline of the sub-precincts contained within the Bromelton SDA.

[1] Based on information provided at https://www.inlandrail.gov.au/benefits/qld

Figure 4.1 Bromelton SDA and Sub-Precincts



These precincts provide an estimated 1,821.8 hectares of industrial zoned land, with the SCT intermodal terminal occupying the Rail Dependent Industry Precinct within the northern corner of the Bromelton SDA, as summarised in Table 4.1.

Table 4.1 Area of Bromelton SDA Precincts

Precinct	Estimated Area (ha)
Rail Dependant Industry Precinct – SCT Terminal	135.3
Rail Dependant Industry Precinct – Balance Land	319.6
Medium – High Impact Industry Precinct	707.7
Special Industry Precinct	788.4
Bromelton Local Service Centre Precinct	6.0
Total Land Available for Development (less SCT Terminal)	**1,815.7**

Source: Queensland Government Queensland Spatial Catalogue (2021)

The major catalyst for the development and consequent take-up of Bromelton SDA is the Kagaru to Acacia Ridge and Bromelton section of Inland Rail. The project will support the efficient movement of freight between the Acacia Ridge intermodal freight terminal to the SCT Logistics intermodal facility at Bromelton. According to the proponent's website, this section of the Inland Rail project is at the reference design/project approvals stage and is anticipated to be fully operational by 2027.

Another major factor affecting the take-up of development in the Bromelton SDA is the efficiency of the Mount Lindesay Highway as a major freight route. Improvements to the capacity of the Mount Lindesay Highway and connections to major freight routes would also act as a major catalyst for development in the Bromelton SDA.

4.2 Projected Land Demand at Bromelton SDA

Previous assessments have anticipated that the take-up of industrial land allotments within the Bromelton SDA would occur at between six to 44 hectares per annum.

Based on market activity to date, it is considered unlikely that significant take-up of industrial land will occur in Bromelton SDA prior to the planned operation of the relevant section of Inland Rail in 2027. To date, the establishment of the SCT Logistics terminal has not represented a catalyst to development within the Bromelton SDA.

During the early years of establishment, activity within the Bromelton SDA is anticipated to be concentrated around the Rail Dependent Precinct to the south east of the SCT Intermodal Facility, as the precinct attracts industrial businesses looking to leverage off the Inland Rail infrastructure upgrades. The establishment of activity within the Bromelton Local Service Centre Precinct is anticipated to occur from 2038 as a critical mass of industrial development occurs within the Bromelton SDA.

The assessment has assumed the following take-up of industrial land within the Bromelton SDA to 2041, assuming that the relevant section of Inland Rail is delivered by 2027:

- 2027-2030: Annual take-up of five hectares per annum;
- 2031-2035: Annual take-up of eight hectares per annum, increasing to twelve hectares per annum by 2035; and

+ 2036-2041: Annual take-up of 14 hectares per annum in 2036, increasing to 20 hectares per annum by 2041.

Table 4.2 summarises the projected take-up of industrial allotments within Bromelton SDA from 2027 to 2041, including an indicative breakdown of take-up by precinct.

Table 4.2 Indicative Annual Take-Up for Industrial Land by Precinct, Bromelton SDA

	Industrial Land Take Up (hectares)				
Time Period	Rail Dependent Industry Precinct	Medium – High Impact Industry Precinct	Special Industry Precinct	Bromelton Local Centre Service Precinct	Total
2027	5	-	-	-	5
2028	5	-	-	-	5
2029	5	-	-	-	5
2030	5	-	-	-	5
2031	5	-	3	-	8
2032	5	1	3	-	9
2033	5	2	3	-	10
2034	5	3	3	-	11
2035	5	4	3	-	12
2036	6	5	3	-	14
2037	7	6	3	-	16
2038	7	7	3	1	18
2039	9	7	3	1	20
2040	9	7	3	1	20
2041	9	7	3	1	20
Total, 2027-41	**92**	**49**	**33**	**4**	**178**

Source: Bull & Bear Economics estimates

4.3 Projected Employment within Bromelton SDA

4.3.1 Projected Total Employment

Previous work undertaken for the Bromelton SDA identified the following employment density ratios could be achieved within each precinct.

+ Rail Dependent Precinct: 20 workers per hectare;
+ Major Industry: 30 workers per hectare; and
+ Local Services Centre:100 workers per hectare.

Our assessment has adopted the following employment density ratios, which align with previous employment density estimates:

+ Rail Dependent Industry Precinct: 20 workers per hectare;
+ Medium – High Impact Industry Precinct: 30 workers per hectare;
+ Special Industry Precinct: 30 workers per hectare; and
+ Bromelton Local Centre Service Precinct: 100 workers per hectare.

Based on the above assumptions, total employment within the Bromelton SDA resulting from industrial land take up is projected to increase from 100 persons in 2027 to 4,700 persons in 2041.

In addition to employment generated from industrial land take up within the Bromelton SDA, employment at the existing SCT Intermodal Facility is anticipated to increase, and will support co-locating businesses within the SDA.

Our assessment has assumed that employment within the SCT Terminal will increase from 125 persons in 2027 to 350 persons in 2041 to reflect increased activity within the Bromelton SDA, but also recognising that significant capacity remains to accommodate future business activity post 2041, including within the Rail Dependent industry precinct.

Table 4.3 summarises estimated employment within the Bromelton SDA by precinct between 2027 and 2041, based on the assumptions detailed above.

Table 4.3 Estimated Employment by Precinct, Bromelton SDA

Time Period	Estimated Employment (persons)					
	Rail Dependent Industry Precinct – SCT Terminal	Rail Dependent Industry Precinct - Balance	Medium – High Impact Industry Precinct	Special Industry Precinct	Bromelton Local Centre Service Precinct	Total
2027	125	100	0	0	0	225
2028	149	200	0	0	0	349
2029	162	300	0	0	0	462
2030	174	400	0	0	0	574
2031	186	500	0	90	0	776
2032	198	600	30	180	0	1,008
2033	211	700	90	270	0	1,271
2034	223	800	180	360	0	1,563
2035	235	900	300	450	0	1,885
2036	250	1,020	450	540	0	2,260
2037	267	1,160	630	630	0	2,687
2038	284	1,300	840	720	100	3,244
2039	306	1,480	1,050	810	200	3,846
2040	328	1,660	1,260	900	300	4,448
2041	350	1,840	1,470	990	400	5,050

Source: Bull & Bear Economics estimates

4.3.2 Projected Employment by Industry

To convert estimated employment to projected employment by industry, employment estimates by precinct have been allocated as follows, based on the likely pattern of industrial development and consideration of the preferred development intent within each precinct.

The allocation of employment by industry has been held constant throughout the projection period and is intended to reflect an indicative estimate only.

Table 4.4 summarises the assumed distribution of employment by industry within each precinct throughout the projection horizon.

Table 4.4 Estimated Employment by Precinct, Bromelton SDA

ANZSIC Industry Sector	Rail Dependent Industry Precinct – SCT Terminal	Rail Dependent Industry Precinct - Balance	Medium – High Impact Industry Precinct	Special Industry Precinct	Bromelton Local Centre Service Precinct
Manufacturing		20%	40%	70%	
Wholesale Trade		30%	30%		
Transport, Postal and Warehousing	100%	50%	20%	30%	
Retail Trade					35%
Professional, Scientific & Technical Services					30%
Finance & Insurance Services					30%
Health Care & Social Assistance					5%
Other Services			10%		

Source: Bull & Bear Economics estimates

Based on the above assumptions, total employment within the Bromelton SDA at five year intervals between 2021 and 2041 is presented below.

Table 4.5 Projected Employment by Industry, Bromelton SDA, 2021-2041

	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	0	0	0	0	0
Mining	0	0	0	0	0
Manufacturing	0	0	163	762	1,649
Electricity, Gas, Water and Waste Services	0	0	0	0	0
Construction	0	0	0	0	0
Wholesale Trade	0	0	150	441	993
Retail Trade	0	0	0	0	140
Accommodation and Food Services	0	0	0	0	0
Transport, Postal and Warehousing	125	125	463	1,012	1,861
Information Media and Telecommunications	0	0	0	0	0
Financial and Insurance Services	0	0	0	0	120
Rental, Hiring and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services	0	0	0	0	120
Administrative and Support Services	0	0	0	0	0
Public Administration and Safety	0	0	0	0	0
Education and Training	0	0	0	0	0
Health Care and Social Assistance	0	0	0	0	20
Arts and Recreation Services	0	0	0	0	0
Other Services	0	0	0	45	147
Total	**125**	**125**	**776**	**2,260**	**5,050**

Source: Bull & Bear Economics estimates

4.4 Projected Employment by Industry – Balance of Beaudesert SA2

Therefore, under the alternative scenario, total employment with the Balance of Beaudesert SA2 is projected to increase from 1,856 persons in 2016 to 7,477 persons in 2041.

Table 4.6 Projected Employment by Industry, Balance of Beaudesert SA2, Alternative Scenario, 2021-2041

	2016	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	505	462	432	409	393	385
Mining	30	27	26	26	26	27
Manufacturing	294	334	375	582	1,222	2,148
Electricity, Gas, Water and Waste Services	11	16	28	50	69	83
Construction	205	297	361	409	445	471
Wholesale Trade	27	28	29	181	473	1,026
Retail Trade	76	35	0	0	0	140
Accommodation and Food Services	137	148	163	177	190	203
Transport, Postal and Warehousing	82	205	203	542	1,091	1,943
Information Media and Telecommunications	11	11	11	11	11	11
Financial and Insurance Services	10	4	0	0	0	120
Rental, Hiring and Real Estate Services	18	20	23	25	28	31
Professional, Scientific and Technical Services	62	73	86	99	112	248
Administrative and Support Services	47	53	62	73	83	96
Public Administration and Safety	46	25	3	0	0	0
Education and Training	173	193	216	241	266	293
Health Care and Social Assistance	31	3	0	0	0	20
Arts and Recreation Services	61	64	68	73	78	83
Other Services	31	8	0	0	45	147
Total	**1,856**	**2,005**	**2,087**	**2,895**	**4,532**	**7,477**

Source: Bull & Bear Economics estimates

5 Projected Employment and Land Demand

This section converts employment projections for each of the study areas to required land. The purpose of this conversion is to determine whether sufficient zoned land exists to accommodate employment growth within Scenic Rim to 2041.

For Beaudesert SA2 balance, this section of the report focusses on the land requirements other than within the Bromelton SDA to 2041, with the specific land use requirements of this precinct discussed separately in Section 4 of the report.

5.1 Land Use Categories

Scenic Rim's Local Government Infrastructure Plan (LGIP) considers the following non-residential development sub-categories:

+ Commercial;
+ Community Purpose;
+ Industry;
+ Retail;
+ Rural; and
+ Other.

Table 5.1 outlines the uses contained within each non-residential development sub-category under the LGIP.

Table 5.1 LGIP development Types and Corresponding Non-Residential Uses

LGIP Development Type	Uses
Commercial	Garden centre
	Hardware and trade supplies
	Outdoor sales
	Showroom
Community Purpose	Cemetery
	Club
	Community care centre
	Community use
	Crematorium
	Detention facility
	Emergency services
	Funeral parlour
	Hospital
	Outstation
	Place of worship
	Residential care facility
Industry	Brothel
	Bulk landscape supplies
	Extractive industry
	Low impact industry
	High impact industry

LGIP Development Type	Uses
	Marine industry Medium impact industry Research and technology industry Special industry Transport Depot Warehouse
Retail	Adult store Bar Car wash Childcare centre Educational establishment Food and drink outlet Function facility Health care service Hotel Indoor sport and recreation Major sport, recreation and entertainment facility Market Motor sport facility Nightclub entertainment facility Office Outdoor sport and recreation Parking station Service industry Service station Shop Shopping centre Theatre Tourist attraction Veterinary services
Rural	Agricultural supplies store Animal husbandry Animal keeping Aquaculture Cropping Intensive animal industry Intensive horticulture Permanent plantation Roadside stall Rural industry Wholesale nursery Winery
Other	Air services Environment facility Landing Major electricity infrastructure Park Port service

LGIP Development Type	Uses
	Renewable energy facility Substation Telecommunication facility Utility installation

Source: Scenic Rim Regional Council Planning Scheme (2020)

5.2 Employment Zones within Scenic Rim

The Scenic Rim Planning Scheme identifies the following land use zones that accommodate employment uses:

+ Major Centre;
+ District Centre;
+ Neighbourhood Centre;
+ Local Centre;
+ Mixed Use;
+ Industry;
+ Special Purpose (i.e. Bromelton SDA);
+ Major Tourism;
+ Minor Tourism;
+ Community Facilities; and
+ Township.

Table 5.2 outlines the geographic distribution of employment zones within Scenic Rim Regional Council, with Table 5.3 summarising the location of employment zones within each of the defined study areas.

Table 5.2 Employment Land Zones within Each Locality in Scenic Rim Regional Council

Locality	Employment Land Zones in Each Locality										
	Community Facilities	Township	Major Centre	District Centre	Neighbourhood Centre	Local Centre	Mixed Use	Industry	Special Purpose	Major Tourism	Minor Tourism
Major Employment Nodes in Scenic Rim											
Beaudesert	✓		✓		✓		✓	✓			
Boonah	✓			✓			✓	✓			
Kalbar	✓					✓	✓				
Canungra	✓					✓	✓				✓
Tamborine Mountain	✓			✓	✓		✓				✓
Other Employment Nodes in Scenic Rim											
Aratula	✓	✓						✓			
Kooralbyn	✓					✓	✓	✓		✓	
Bromelton	✓								✓		
Beechmont	✓	✓									
Gleneagle	✓	✓									
Harrisville	✓	✓									
Mount Alford	✓	✓									
Peak Crossing	✓	✓									
Rathdowney	✓	✓									
Roadvale	✓	✓									
Tamborine Village	✓	✓									
Warrill View	✓	✓									

Source: Derived from data provided by Scenic Rim Regional Council

Table 5.3 Concordance of Localities to Study Area

Locality	Study Area
Beaudesert	Beaudesert catchment
Boonah	Boonah catchment
Kalbar	Boonah catchment
Tamborine Mountain	Tamborine Mountain / Tamborine Village catchment
Tamborine Village	Tamborine Mountain / Tamborine Village catchment
Canungra	Canungra catchment
Beechmont	Canungra catchment
Bromelton	Balance of Beaudesert SA2
Gleneagle	Balance of Beaudesert SA2
Kooralbyn	Balance of Beaudesert SA2
Rathdowney	Balance of Beaudesert SA2
Aratula	Balance of Boonah SA2
Harrisville	Balance of Boonah SA2
Mount Alford	Balance of Boonah SA2
Peak Crossing	Balance of Boonah SA2
Roadvale	Balance of Boonah SA2
Warrill View	Balance of Boonah SA2

Source: Scenic Rim Regional Council (2021)

Based on the consideration of LGIP non-residential development sub-categories, land use zonings within Scenic Rim and our understanding of the variation in land requirements by use, we have developed four employment to land use matrices, as detailed below:

+ Beaudesert and Boonah / Kalbar catchments;
+ Canungra and Tamborine Mountain / Tamborine Village catchments (to reflect employment for tourism related activity in both catchments);
+ Beaudesert SA2 balance (to capture tourism activity at Kooralbyn); and
+ Boonah SA2 balance.

The land use categories considered for each employment to land use matrix were:

+ Commercial office;
+ Retail;
+ Industry;
+ Community facilities;
+ Natural resources;
+ Mobile; and
+ Tourism (only for the sub-areas which had land specifically zoned for tourism activities).

Tables 5.4 to 5.7 outline the employment to land use matrices applied to each sub-area within Scenic Rim Regional Council.

Table 5.4 Employment to Land Use Matrix, Beaudesert and Boonah / Kalbar catchments

	Commercial Office	Retail	Industry	Community Facilities	Natural Resources	Mobile	Total
Agriculture, Forestry and Fishing	10%				90%		100%
Mining	10%				90%		100%
Manufacturing			100%				100%
Electricity, Gas, Water and Waste Services			60%			40%	100%
Construction	10%		50%			40%	100%
Wholesale Trade			80%			20%	100%
Retail Trade		100%					100%
Accommodation and Food Services		80%		20%			100%
Transport, Postal and Warehousing			80%			20%	100%
Information Media and Telecommunications	90%					10%	100%
Financial and Insurance Services	60%	30%				10%	100%
Rental, Hiring and Real Estate Services	80%		20%				100%
Professional, Scientific and Technical Services	90%		5%			5%	100%
Administrative and Support Services	85%			15%			100%
Public Administration and Safety	70%			30%			100%
Education and Training	15%			85%			100%
Health Care and Social Assistance	10%			75%		15%	100%
Arts and Recreation Services		10%		90%			100%
Other Services		20%	40%	10%		30%	100%

Source: Bull & Bear Economics

Table 5.5 Employment to Land Use Matrix, Canungra and Tamborine Mountain / Tamborine Village catchments

	Commercial Office	Retail	Industry	Community Facilities	Natural Resources	Mobile	Tourism	Total
Agriculture, Forestry and Fishing	10%				90%			100%
Mining	10%				90%			100%
Manufacturing			100%					100%
Electricity, Gas, Water and Waste Services			60%			40%		100%
Construction	10%		50%			40%		100%
Wholesale Trade			80%			20%		100%
Retail Trade		100%						100%
Accommodation and Food Services		60%		20%			20%	100%
Transport, Postal and Warehousing			80%			20%		100%
Information Media and Telecommunications	90%					10%		100%
Financial and Insurance Services	60%	30%				10%		100%
Rental, Hiring and Real Estate Services	80%		20%					100%
Professional, Scientific and Technical Services	90%		5%			5%		100%
Administrative and Support Services	85%			15%				100%
Public Administration and Safety	70%			30%				100%
Education and Training	15%			85%				100%
Health Care and Social Assistance	10%			75%		15%		100%
Arts and Recreation Services		10%		90%				100%
Other Services		20%	40%	10%		30%		100%

Source: Bull & Bear Economics

Table 5.6 Employment to Land Use Matrix, Beaudesert SA2 Balance (excluding Bromelton SDA)

	Commercial Office	Retail	Industry	Community Facilities	Natural Resources	Mobile	Tourism	Total
Agriculture, Forestry and Fishing					100%			100%
Mining					100%			100%
Manufacturing			100%					100%
Electricity, Gas, Water and Waste Services			60%			40%		100%
Construction			50%			50%		100%
Wholesale Trade			80%			20%		100%
Retail Trade		100%						100%
Accommodation and Food Services		60%		25%			15%	100%
Transport, Postal and Warehousing			80%			20%		100%
Information Media and Telecommunications	85%					15%		100%
Financial and Insurance Services	55%	30%				15%		100%
Rental, Hiring and Real Estate Services	80%		20%					100%
Professional, Scientific and Technical Services	90%		5%			5%		100%
Administrative and Support Services	85%			15%				100%
Public Administration and Safety	60%			40%				100%
Education and Training	10%			90%				100%
Health Care and Social Assistance	5%			75%		20%		100%
Arts and Recreation Services		10%		90%				100%
Other Services		15%	40%	10%		35%		100%

Source: Bull & Bear Economics

Table 5.7 Employment to Land Use Matrix, Boonah SA2 Balance

	Commercial Office	Retail	Industry	Community Facilities	Natural Resources	Mobile	Total
Agriculture, Forestry and Fishing					100%		100%
Mining					100%		100%
Manufacturing			100%				100%
Electricity, Gas, Water and Waste Services			60%			40%	100%
Construction			50%			50%	100%
Wholesale Trade			80%			20%	100%
Retail Trade		100%					100%
Accommodation and Food Services		80%		20%			100%
Transport, Postal and Warehousing			80%			20%	100%
Information Media and Telecommunications	85%					15%	100%
Financial and Insurance Services	55%	30%				15%	100%
Rental, Hiring and Real Estate Services	80%		20%				100%
Professional, Scientific and Technical Services	90%		5%			5%	100%
Administrative and Support Services	85%			15%			100%
Public Administration and Safety	60%			40%			100%
Education and Training	10%			90%			100%
Health Care and Social Assistance	5%			75%		20%	100%
Arts and Recreation Services		10%		90%			100%
Other Services		15%	40%	10%		35%	100%

Source: Bull & Bear Economics

5.3 Projected Employment by Land Use

Based on the matrices presented above, the derived employment by land use is presented in Table 5.8.

Table 5.8 Projected Employment to Land Use by Catchment, Scenic Rim Regional Council

	2016	2021	2026	2031	2036	2041
Boonah / Kalbar catchment						
Commercial Office	342	373	411	458	509	568
Retail	516	515	518	527	538	552
Industry	377	419	455	486	507	530
Community Facilities	582	635	707	795	888	985
Natural Resources	240	242	250	256	259	260
Mobile	217	251	281	312	338	362
Total	2,274	2,435	2,622	2,834	3,038	3,258
Beaudesert catchment						
Commercial Office	765	878	1,012	1,144	1,279	1,425
Retail	923	1,014	1,108	1,170	1,225	1,277
Industry	647	730	818	936	1,044	1,133
Community Facilities	1,305	1,512	1,749	2,006	2,259	2,511
Natural Resources	66	66	73	87	106	126
Mobile	419	526	636	761	872	963
Total	4,125	4,725	5,397	6,106	6,785	7,435
Tamborine Mountain / Tamborine Village catchment						
Commercial Office	541	599	669	749	833	934
Retail	674	708	750	794	833	869
Industry	506	574	629	694	755	813
Community Facilities	722	788	880	987	1,095	1,209
Natural Resources	142	131	127	127	131	137
Mobile	243	279	304	335	364	392
Tourism	97	100	107	114	121	129
Total	2,925	3,180	3,466	3,800	4,132	4,482
Canungra catchment						
Commercial Office	465	518	587	657	727	797
Retail	284	299	319	340	359	377
Industry	108	126	139	151	161	172
Community Facilities	337	367	408	452	497	542
Natural Resources	66	65	66	69	73	78
Mobile	62	72	77	82	87	92
Tourism	60	61	62	65	68	72
Total	1,382	1,447	1,596	1,752	1,905	2,058
Balance of Boonah SA2						
Commercial Office	112	115	121	129	140	155
Retail	196	174	156	146	142	144
Industry	363	400	427	463	500	534
Community Facilities	249	268	293	322	351	382

	2016	2021	2026	2031	2036	2041
Natural Resources	530	530	546	564	583	602
Mobile	163	187	198	209	220	232
Total	1,613	1,674	1,741	1,833	1,934	2,049
Balance of Beaudesert SA2						
Commercial Office	171	172	181	204	230	261
Retail	171	133	104	113	122	130
Industry	509	589	668	751	825	889
Community Facilities	297	289	307	338	370	404
Natural Resources	535	489	458	434	419	412
Mobile	152	186	219	253	280	300
Tourism	20	22	24	26	29	30
Total	1,856	1,880	1,962	2,119	2,273	2,427
Scenic Rim Regional Council						
Commercial Office	2,395	2,655	2,980	3,342	3,718	4,141
Retail	2,765	2,842	2,956	3,091	3,219	3,348
Industry	2,511	2,838	3,136	3,481	3,792	4,072
Community Facilities	3,492	3,859	4,344	4,901	5,460	6,034
Natural Resources	1,578	1,523	1,521	1,537	1,570	1,615
Mobile	1,256	1,501	1,716	1,952	2,159	2,340
Tourism	178	183	194	205	218	231
Total	14,175	15,340	16,784	18,444	20,067	21,709

Source: Bull & Bear Economics Estimates

5.4 Projected Floor Space and Land Demand

5.4.1 Scenic Rim LGIP Assumptions

The Scenic Rim LGIP Extrinsic Material – Planning Assumptions outlines the assumed conversion rates by ANZSIC division in terms of gross floor area per worker, as summarised in Table 5.9 below.

Table 5.9 Scenic Rim Regional Council LGIP Employment Density Assumptions by Industry Division and LGIP Projection Type

LGIP Projection Type	ANZSIC Division	Employment Density (sqm/worker)
Commercial / Retail	Retail Trade - retail	29
Commercial / Retail	Retail Trade - commercial	45
Community Purpose / Other / Retail	Other Services	29
Community Purposes	Health Care and Social Assistance	35
Community Purposes	Arts and Recreation Services	35
Community Purposes	Public Administration and Safety	35
Industry	Mining (WC + storage)	55
Industry	Manufacturing	30-200, based on survey data
Industry	Construction (WC + storage)	55
Industry	Wholesale Trade	220
Industry	Transport, Postal and Warehousing	220
Industry	Electricity, Gas, Water and Waste Services	120
Retail	Accommodation and Food Services	29
Retail	Financial and Insurance Services	25

LGIP Projection Type	ANZSIC Division	Employment Density (sqm/worker)
Retail	Rental, Hiring and Real Estate Services	25
Retail	Professional, Scientific and Technical Services	25
Retail	Administrative and Support Services	25
Retail	Education and Training	35
Retail / Industry	Information Media and Telecommunications	120

Source: Scenic Rim LGIP Extrinsic Material – Planning Assumptions Report

5.4.2 Floor Space and Site Cover Assumptions

To determine whether capacity exists within zoned employment land across Scenic Rim to accommodate employment growth, our assessment has derived floor space ratios and site cover assumptions by land use.

The floor space and site cover assumptions have incorporated regional variation across Scenic Rim to reflect that development activity is typically more condensed in the major employment nodes than the rural localities of Scenic Rim.

Table 5.10 summarises our assumptions relating to floor space per worker and site cover assumptions by land use.

Table 5.10 Site Cover Assumptions

	sqm/person		Assumed Site Cover	
	Major Localities	Remainder	Major Localities	Remainder
Commercial Office	20	30	50%	40%
Retail	40	60	50%	40%
Industry	150	200	40%	30%
Community Facilities	35	50	40%	30%
Tourism	150	200	40%	30%

Source: Bull & Bear Economics Estimates

5.4.3 Projected Land Demand by Use

Table 5.11 presents the projected land demand and incremental land demand (on 2021 levels) by use for each of the employment areas within Scenic Rim Regional Council.

Table 5.11 Projected Land Demand and Incremental Land Demand by Employment Area and Land Use

	Projected Land Demand (ha)						Incremental Land Demand (ha, on 2021 levels)			
	2016	2021	2026	2031	2036	2041	2026	2031	2036	2041
Boonah / Kalbar catchment										
Commercial Office	0.3	0.4	0.4	0.5	0.5	0.6	0.0	0.1	0.1	0.2
Retail	1.0	1.0	1.0	1.1	1.1	1.1	0.0	0.0	0.0	0.1
Industry	2.3	2.5	2.7	2.9	3.0	3.2	0.2	0.4	0.5	0.7
Community Facilities	0.8	0.9	1.0	1.1	1.2	1.4	0.1	0.2	0.4	0.5
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Total	4.5	4.8	5.2	5.5	5.9	6.2	0.4	0.7	1.1	1.4
Beaudesert catchment										
Commercial Office	0.8	0.9	1.0	1.1	1.3	1.4	0.1	0.3	0.4	0.5
Retail	1.8	2.0	2.2	2.3	2.5	2.6	0.2	0.3	0.4	0.5
Industry	3.9	4.4	4.9	5.6	6.3	6.8	0.5	1.2	1.9	2.4
Community Facilities	1.8	2.1	2.4	2.8	3.2	3.5	0.3	0.7	1.0	1.4
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Total	8.3	9.4	10.6	11.9	13.2	14.3	1.2	2.5	3.8	4.9
Tamborine Mountain / Tamborine Village catchment										
Commercial Office	0.5	0.6	0.7	0.7	0.8	0.9	0.1	0.2	0.2	0.3
Retail	1.3	1.4	1.5	1.6	1.7	1.7	0.1	0.2	0.3	0.3
Industry	3.0	3.4	3.8	4.2	4.5	4.9	0.3	0.7	1.1	1.4
Community Facilities	1.0	1.1	1.2	1.4	1.5	1.7	0.1	0.3	0.4	0.6
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Tourism	0.6	0.6	0.6	0.7	0.7	0.8	0.0	0.1	0.1	0.2
Total	6.5	7.2	7.8	8.6	9.3	10.0	0.7	1.4	2.1	2.9
Canungra catchment										
Commercial Office	0.5	0.5	0.6	0.7	0.7	0.8	0.1	0.1	0.2	0.3
Retail	0.6	0.6	0.6	0.7	0.7	0.8	0.0	0.1	0.1	0.2
Industry	0.7	0.8	0.8	0.9	1.0	1.0	0.1	0.1	0.2	0.3
Community Facilities	0.5	0.5	0.6	0.6	0.7	0.8	0.1	0.1	0.2	0.2
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Tourism	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.1
Total	2.5	2.8	3.0	3.3	3.5	3.8	0.3	0.5	0.8	1.0
Balance of Boonah SA2										
Commercial Office	0.1	0.1	0.1	0.2	0.2	0.2	0.0	0.0	0.0	0.0
Retail	0.5	0.4	0.4	0.3	0.3	0.3	0.0	-0.1	-0.1	-0.1
Industry	2.2	2.4	2.6	2.8	3.0	3.2	0.2	0.4	0.6	0.8
Community Facilities	0.4	0.4	0.4	0.5	0.5	0.6	0.0	0.1	0.1	0.2
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-

	Projected Land Demand (ha)						Incremental Land Demand (ha, on 2021 levels)			
	2016	2021	2026	2031	2036	2041	2026	2031	2036	2041
Total	3.2	3.4	3.5	3.8	4.0	4.3	0.2	0.4	0.7	1.0
Balance of Beaudesert SA2										
Commercial Office	0.2	0.2	0.2	0.2	0.3	0.3	0.0	0.0	0.1	0.1
Retail	0.4	0.3	0.3	0.3	0.3	0.3	-0.1	0.0	0.0	0.0
Industry	3.1	3.5	4.0	4.5	4.9	5.3	0.5	1.0	1.4	1.8
Community Facilities	0.4	0.4	0.5	0.5	0.6	0.6	0.0	0.1	0.1	0.2
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Tourism	0.1	0.1	0.1	0.2	0.2	0.2	0.0	0.0	0.0	0.0
Total	4.2	4.6	5.1	5.7	6.2	6.8	0.5	1.1	1.6	2.1
Scenic Rim Regional Council										
Commercial Office	2.5	2.7	3.0	3.4	3.8	4.2	0.3	0.7	1.1	1.5
Retail	5.7	5.8	6.0	6.3	6.5	6.8	0.2	0.5	0.7	1.0
Industry	15.1	17.0	18.8	20.9	22.8	24.4	1.8	3.9	5.7	7.4
Community Facilities	4.9	5.5	6.1	6.9	7.7	8.5	0.7	1.5	2.3	3.1
Natural Resources	-	-	-	-	-	-	-	-	-	-
Mobile	-	-	-	-	-	-	-	-	-	-
Tourism	1.1	1.1	1.2	1.2	1.3	1.4	0.1	0.1	0.2	0.3
Total	29.2	32.1	35.2	38.7	42.1	45.4	3.1	6.6	10.0	13.3

Source: Bull & Bear Economics Estimates

6 Vacant and Underutilised Site Assessment

The purpose of this section is to provide an overview of the quantum of vacant and underutilised sites within Scenic Rim Regional Council and to determine the potential employment yield of this land.

Scenic Rim Regional Council have provided detailed information regarding the total existing land use by zone, including constrained, vacant and underutilised land within seventeen localities across Scenic Rim, these being:

+ Beaudesert;
+ Boonah;
+ Canungra;
+ Tamborine Mountain;
+ Aratula;
+ Kalbar;
+ Kooralbyn;
+ Bromelton;
+ Beechmont;
+ Gleneagle;
+ Harrisville;
+ Mount Alford;
+ Peak Crossing;
+ Rathdowney;
+ Roadvale;
+ Tamborine Village; and
+ Warrill View.

Each site was identified as vacant, taken up or underutilised by Scenic Rim Regional Council, based on the following criteria:

+ **Vacant:** No buildings/ built form on site, nothing is being stored, vegetated or cleared land;
+ **Taken up:** Current employment operating use on site, employment-type buildings and structures exist on the lot, permeant car park associated with an operating employment use/business, permanent/formal outside storage areas associated with an operating use/business, site under-construction for an employment related use/activity; and
+ **Underutilised:** Dwelling house exists on the lot and is being used for residential purposes, small operating business on a large lot (i.e majority of site vacant), small building/built form on a large lot, small storage shed on a large lot, informal car park, informal temporary outside storage areas (storage of vehicles, materials, equipment etc), site may also include a structure which is not a dwelling (e.g. stables, gazebo, shed, hut all of which may be dilapidated) but clearly not business/employment related.

A constraints layer was also applied by Council to determine the realistic capacity of zoned vacant and underutilised land through the application of hard constraints in the calculation of developable land, as summarised in Table 6.1 below.

Table 6.1 Hard Constraints Applied in the Calculation of Developable Land

Item	Element	Source	Comments
Koalas	Highly constrained koala habitat	State data	Areas where Core Koala Habitat Area and Locally Refined Koala Habitat Area overlap with land in a Koala Priority Area
Flood	Defined Flood Area Investigation Area	Scenic Rim Planning Scheme data	
Slope	Slope Over 25%	Scenic Rim Planning Scheme data	
Landslide	Very High High Medium	Scenic Rim Planning Scheme data	
Water and Wastewater Infrastructure	Bulk Water Storage Infrastructure - Points Pipelines and Channels Pump Station Facility Bulk Water Facility Bulk Water Supply Buffer Area Wastewater Treatment Plant Wastewater Treatment Plant Buffer Area	State data Scenic Rim Planning Scheme data (wastewater)	
Rail	Existing Rail Network Future Rail Network Rail Buffer	State data	
Electricity	Electricity Substation 110kV Transmission Line 33kV Transmission Line Major Electricity Infrastructure Buffer Area Energex Easements	State data	
Roads	Road Investigation Corridor State Controlled Roads	State data Scenic Rim Planning Scheme data (Road Investigation Corridor)	
Aviation and Defence	Aviation Facility Building Restricted Area Defence Land Defence Land Buffer Area	State data Scenic Rim Planning Scheme data (Defence Land and Buffer Area)	
Heritage	Local Heritage Place Queensland Heritage Register	State data Scenic Rim Planning Scheme data (Local Heritage Place)	
Streams and Dams	Urban Water Supply Storage Stream Order 4 to 7	State data	Only major stream orders (4-7) considered as hard constraints.
Agriculture	Agricultural Land Classification (Class A and Class B)	State data	
Local Biodiversity	Core Corridor Node Corridor	Scenic Rim Planning Scheme data	

Item	Element	Source	Comments
	Stepping Stone Critical Linkage		
Maters of State Environmental Significance	Regulated Vegetation Category B Regulated Vegetation Category C Regulated Vegetation Essential Habitat Regulated Vegetation 100m from wetland Legally Secured Offset Area Vegetation Offsets Regulated Vegetation intersecting a watercourse Protected Area - Estates Protected Area - Nature Refuges Wildlife Habitat - endangered or vulnerable wildlife Wildlife habitat - special least concern animal High ecological value waters - wetlands High ecological significance wetlands High ecological value waters - watercourse	State data	
Key Resource Area	Resource Processing Area KRA Separation Area KRA Transport Route KRA Transport Route Separation Area Mineral Development licence Mining leases	State data	
Matters of National Environmental Significance	Important Wetlands World Heritage Areas	Federal data	

Source: Scenic Rim Regional Council (2021)

In our review of the data provided by Council, it was identified that sites within the rural localities were not always within the Urban Footprint under ShapingSEQ (2017) but fell within the Rural Living Area (RLA) or the Regional Landscape and Rural Production Area (RLRPA).

ShapingSEQ identifies that the RLA is to be used for rural residential development, as opposed to employment generating uses. The RLRPA, on the other hand, can support employment generating activity but is to be protected from urban and rural residential development. Land zoned for employment purposes within the RLA in Scenic Rim Regional Council was identified in the localities of Tamborine Mountain (Community Facilities and Minor Tourism zones) and Tamborine Village (Township zone). Based on advice from Council, our assessment has included these areas as having potential to accommodate employment generating uses given their zoning under the planning scheme.

Land zoned for employment purposes within the RLRPA was identified in a number of localities across Scenic Rim but only within the Community Facilities or Township zones.

Our summary of the data provided by Council has been presented for the following categories:

+ Total zoned land;
+ Vacant zoned land;
+ Underutiilsed zoned land; and

+ Constrained zoned land (i.e. those allotments that faced hard constraints as identified by Council).

The estimates of vacant zoned land and underutilised zoned land incorporate only the land areas that do not face hard constraints (i.e. vacant zoned land plus underutilised zoned land plus constrained zoned land equals total zoned land).

Appendix A provides a detailed inventory of all zoned land in each of the 17 localities by study area, with subsequent sections providing a high level overview at the study area level.

6.1 Scenic Rim LGA

Within Scenic Rim LGA there is approximately 3,741.7 hectares of zoned land, over two thirds of which is vacant or underutilised special purpose zoned land in the Bromelton SDA. Other significant volumes of vacant land within the LGA are within the community facilities, mixed use and industrial zones.

Overall, approximately 17.5% of all zoned land in the Scenic Rim LGA has been taken up according to Scenic Rim Regional Council's inventory of land.

Table 6.2 provides a summary of zoned land within the Scenic Rim LGA as of August 2021.

Table 6.2 Summary of Employment Land by Zone (hectares) – Scenic Rim LGA, August 2021

Zone	Total Zoned Land	Taken Up	Vacant Land	Underutilised	Constrained
Community Facilities	403.9	195.0	19.8	29.0	160.1
Township	112.3	59.2	6.8	25.4	20.9
Major Centre	22.6	13.6	0.7	8.3	0.0
District Centre	16.0	12.1	0.3	3.0	0.7
Neighbourhood Centre	4.4	3.8	0.1	0.6	0.0
Local Centre	16.1	5.7	1.8	1.3	7.3
Mixed Use	90.8	30.4	28.2	18.1	14.1
Industry	123.7	24.6	27.5	50.1	21.6
Special Purpose	2,788.7	195.8	1,495.3	1,097.6	0.0
Major Tourism	118.5	98.1	0.0	13.7	6.7
Minor Tourism	44.5	14.6	0.8	25.2	3.9
Total	3,741.7	652.8	1,581.2	1,272.2	235.4

Source: Scenic Rim Regional Council (2021)

6.2 Boonah SA2

Within the Boonah SA2, the majority of zoned land is for community facilities, most of which has been taken up. Across the entire SA2 there are approximately 26.3 hectares of unconstrained vacant land, most of which is zoned for industrial uses (16.3 hectares). A similar scenario is evident for underutilised sites, whereby most underutilised sites across the SA2 are zoned for industrial uses.

Within the Boonah / Kalbar catchment, most land is zoned for industry and community facilities. Over 90.0% of community facilities land has been taken up, however, there is a significant volume of industrial land yet to be taken up (mainly underutilised) representing an opportunity for further industrial development in the catchment.

In the remainder of the Boonah SA2, most vacant land is within the township and community facilities zones (largely driven by vacant sites in Harrisville and Peak Crossing employment nodes). Contrastingly, most underutilised sites in the balance area of the Boonah SA2 were within the township zone.

Table 6.3 summarises the volume of zoned, vacant, underutilised, constrained and taken-up land within the Boonah / Kalbar catchment, remainder of the Boonah SA2 and the SA2 as a whole as of August 2021.

Table 6.3 Land by Zone (hectares) – Boonah / Kalbar catchment, Remainder of Boonah SA2 and Boonah SA2 Total, August 2021

Zone	Boonah / Kalbar catchment					Remainder of Boonah SA2					Boonah SA2 Total				
	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons
Community Facilities	73.6	67.2	1.1	3.6	1.7	42.5	27.2	3.3	2.5	9.4	116.1	94.4	4.4	6.1	11.2
Township	0.0	0.0	0.0	0.0	0.0	92.4	55.9	3.7	17.3	15.5	92.4	55.9	3.7	17.3	15.5
Major Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
District Centre	8.8	7.0	0.2	1.3	0.2	0.0	0.0	0.0	0.0	0.0	8.8	7.0	0.2	1.3	0.2
Neighbourhood Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local Centre	3.8	2.3	0.3	1.0	0.1	0.0	0.0	0.0	0.0	0.0	3.8	2.3	0.3	1.0	0.1
Mixed Use	6.9	2.1	1.3	2.9	0.6	0.0	0.0	0.0	0.0	0.0	6.9	2.1	1.3	2.9	0.6
Industry	87.2	6.1	15.6	45.7	19.9	2.6	0.2	0.7	0.7	1.0	89.7	6.3	16.3	46.3	20.8
Special Purpose	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Major Tourism	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Minor Tourism	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	180.2	84.8	18.5	54.4	22.5	137.5	83.3	7.8	20.5	25.9	317.7	168.1	26.3	74.9	48.5

Note: UU – Underutilised, Cons - Constrained
Source: Scenic Rim Regional Council (2021)

6.3 Beaudesert SA2

The Beaudesert SA2 has a significant volume of land zoned for special purpose uses, which accounts for almost 90.0% of all zoned land within the SA2. Over 50.0% of this industrial land is unconstrained and vacant, largely due to the Bromelton SDA which is yet to be entirely serviced/built out. The Bromelton SDA is within the balance area of the Beaudesert SA2.

Within the Beaudesert catchment, there is a total of 24.8 hectares of unconstrained vacant land, with 44.9% of total zoned land taken-up as of August 2021. Of the remaining vacant land, the most significant volumes are in the industry (11.1 hectares) and mixed use zones (10.5 hectares). There are also small volumes of vacant land in the community facilities zone of the catchment.

Underutilised land in the Beaudesert SA2 is largely concentrated in the Beaudesert SA2 Balance Area within the special purpose zone, driven by the Bromelton SDA. Outside of underutilised special purpose land, there are 13.7 hectares of underutilised major tourism zoned land, all of which is contained within the Beaudesert balance area at Kooralbyn.

Table 6.4 summarises the volume of zoned, vacant, underutilised, constrained and taken-up land within the Beaudesert catchment, remainder of the Beaudesert SA2 and the SA2 as a whole as of August 2021.

Table 6.4 Land by Zone (hectares) – Beaudesert catchment, Remainder of Beaudesert SA2 and Beaudesert SA2 Total, August 2021

Zone	Beaudesert catchment					Remainder of Beaudesert SA2					Beaudesert SA2 Total				
	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons
Community Facilities	113.5	44.0	2.4	9.6	57.4	41.0	22.1	7.4	2.2	9.2	154.4	66.1	9.8	11.9	66.6
Township	0.0	0.0	0.0	0.0	0.0	4.1	1.6	0.0	2.4	0.1	4.1	1.6	0.0	2.4	0.1
Major Centre	22.6	13.6	0.7	8.3	0.0	0.0	0.0	0.0	0.0	0.0	22.6	13.6	0.7	8.3	0.0
District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Neighbourhood Centre	2.5	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	2.5	0.0	0.0	0.0
Local Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0
Mixed Use	56.3	24.5	10.5	15.0	6.3	16.8	0.7	13.8	0.0	2.4	73.1	25.2	24.3	15.0	8.7
Industry	33.4	17.9	11.1	3.7	0.6	0.6	0.4	0.0	0.0	0.2	34.0	18.3	11.1	3.7	0.8
Special Purpose	0.0	0.0	0.0	0.0	0.0	2,788.7	195.8	1,495.3	1,097.6	0.0	2,788.7	195.8	1,495.3	1,097.6	0.0
Major Tourism	0.0	0.0	0.0	0.0	0.0	118.5	98.1	0.0	13.7	6.7	118.5	98.1	0.0	13.7	6.7
Minor Tourism	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	228.2	102.5	24.8	36.6	64.3	2,969.9	319.0	1,516.5	1,115.9	18.6	3,198.2	421.5	1,541.2	1,152.5	83.0

Note: UU – Underutilised, Cons - Constrained
Source: Scenic Rim Regional Council (2021)

6.4 Tamborine – Canungra SA2

Within the Tamborine – Canungra SA2 there is approximately 225.8 hectares of zoned land, 28.0% of which has already been taken up. The majority of taken up land in the Tamborine – Canungra SA2 is within the Community Facilities zone (34.4 hectares), primarily within the Tamborine Mountain / Tamborine Village catchment. Relative to the other two SA2s within the Scenic Rim LGA, there is a relatively low volume of vacant land within the Tamborine – Canungra SA2, however, there are significant volumes of underutilised land, particularly within the minor tourism and community facilities zones. There is also a significant volume of constrained community facilities zoned land, primarily within the Tamborine Mountain / Tamborine Village catchment.

Within the Tamborine Mountain / Tamborine Village catchment there was 10.5 hectares of unconstrained vacant land identified, with capacity concentrated within the community facilities and township zones. Vacant land in the Canungra catchment is largely zoned local centre and mixed use zone (1.5 hectares in each zone). However, the vacant mixed use zoned land with Canungra identified by Council has recently obtained development approval for a retirement village (Lot 6 SP161073). Based on advice from Council, it is understood that 0.8 hectares of mixed use zoned land will be available for development, after adjusting for the approval and constraints on the balance land.

Just over half of the SA2's underutilised land is within the Tamborine Mountain / Tamborine Village catchment in the minor tourism zone totalling 24.6 hectares. Notably, there is limited underutilised land in the Canungra catchment.

Table 6.5 summarises the volume of zoned, vacant, underutilised, constrained and taken-up land within the Canungra catchment, Tamborine Mountain / Tamborine Village catchment and the Tamborine – Canungra SA2 as of August 2021.

Table 6.5 Land by Zone (hectares) – Canungra catchment, Tamborine Mountain / Tamborine Village catchment and Tamborine – Canungra SA2 Total, August 2021

Zone	Tamborine Mountain / Tamborine Village catchment					Canungra catchment					Total Zoned Land				
	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons	Zoned	Taken Up	Vacant	UU	Cons
Community Facilities	121.3	24.0	5.5	10.6	81.2	12.1	10.4	0.2	0.5	1.1	133.4	34.4	5.6	11.1	82.3
Township	13.3	0.5	3.0	5.8	4.0	2.4	1.1	0.0	0.0	1.3	15.7	1.6	3.0	5.8	5.3
Major Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
District Centre	7.3	5.0	0.1	1.7	0.5	0.0	0.0	0.0	0.0	0.0	7.3	5.0	0.1	1.7	0.5
Neighbourhood Centre	1.9	1.3	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	1.9	1.3	0.1	0.6	0.0
Local Centre	0.0	0.0	0.0	0.0	0.0	12.1	3.2	1.5	0.2	7.1	12.1	3.2	1.5	0.2	7.1
Mixed Use	8.3	3.1	1.1	0.3	3.8	2.6	0.0	1.5	0.0	1.1	10.9	3.1	2.6	0.3	4.9
Industry	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Special Purpose	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Major Tourism	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Minor Tourism	43.7	14.5	0.8	24.6	3.8	0.8	0.1	0.0	0.5	0.1	44.5	14.6	0.8	25.2	3.9
Total	195.8	48.4	10.5	43.6	93.3	30.0	14.8	3.2	1.2	10.8	225.8	63.3	13.7	44.8	104.0

Note 1: UU – Underutilised, Cons – Constrained
Note 2: Vacant land estimates presented in this table include Lot 6 SP161073 at Canungra, which has recently obtained approval for a retirement village facility (Ref: MCU20/133).
Source: Scenic Rim Regional Council (2021)

7 Capacity Assessment

The purpose of this section is to identify the employment yield of zoned land, that is, whether there is sufficient existing zoned land within the Planning Scheme for employment uses to accommodate the *ShapingSEQ* benchmark of 7,610 new jobs between 2016 and 2041, including whether the zoning aligns with the projected composition of employment growth and is within the appropriate locations to meet projected demand.

7.1 Potential Employment Yield

7.1.1 Potential Employment Yield of Vacant Sites

To estimate the potential employment yield of vacant and underutilised sites, the following assumptions have been made regarding employment densities and site cover by land use, consistent with the densities applied for the employment to land use conversion reported in Table 5.9.

The potential employment yield of the Bromelton SDA has been discussed separately, considering previous studies which assessed the ability for Queensland Urban Utilities to service land within the Bromelton SDA.

Table 7.1 summarises the assumed employment densities and site cover by vacant sites by zone.

Table 7.1 Assumed Employment Densities and Site Cover by Zone

Zone	Assumed Employment Density (sqm / person)		Assumed Site Cover	
	Major Localities	Balance of Scenic Rim	Major Localities	Balance of Scenic Rim
Community Facilities	35	50	40.0%	30.0%
Township	150	150	35.0%	35.0%
Major Centre	35	55	50.0%	40.0%
District Centre	35	55	50.0%	40.0%
Neighbourhood Centre	35	55	50.0%	40.0%
Local Centre	35	55	50.0%	40.0%
Mixed Use	105	140	45.0%	35.0%
Industry	150	200	40.0%	30.0%
Major Tourism	150	200	40.0%	30.0%
Minor Tourism	150	200	40.0%	30.0%

Note 1: Employment densities have been derived assuming a mix of retail, commercial office and community facilities uses locate on centres zoned land. Similarly, the analysis has made assumptions relating to the distribution of activity on mixed use and township zoned land, with a mix of industrial, retail and commercial office uses considered likely.
Note 2: Assumed employment densities and site cover have been rounded to the nearest five hectares / five percentage points.
Note 3: Both the Tamborine Mountain / Tamborine Village and Canungra catchments, whilst classified as major localities, have Township zoned land.

Based on the above assumptions, the potential employment yield of vacant land within each study area by zone is summarised in Table 7.2 below.

These estimates indicate that the potential employment yield of vacant sites is most significant within the Beaudesert catchment and the balance of Beaudesert SA2, with employment yield concentrated within the mixed use zone.

Table 7.2 Assumed Employment Yield by Zone, Vacant Sites

Zone	Boonah / Kalbar catchment	Remainder of Boonah SA2	Beaudesert catchment	Balance of Beaudesert SA2	Tamborine Mountain / Tamborine Village catchment	Canungra catchment	Scenic Rim RC
Community Facilities	123	199	278	443	625	13	1,680
Township	-	87	-	0	71	0	158
Major Centre	0	0	100	0	0	0	100
District Centre	33	0	0	0	12	0	45
Neighbourhood Centre	0	0	0	0	10	0	10
Local Centre	43	0	0	0	0	173	216
Mixed Use	55	0	450	345	46	114	1,010
Industry	415	11	297	0	0	0	723
Major Tourism	0	0	0	0	0	0	0
Minor Tourism	0	0	0	0	20	0	20
Total	670	297	1,125	788	783	300	3,963

Note: Employment yield estimates for the Canungra catchment assume that of the 1.5 hectares of vacant mixed use zoned land, 0.7 hectares is currently vacant but will be utilised for the retirement village and the remaining 0.8 hectares is currently vacant but will be utilised for a mix of industrial, commercial and retail uses.
Source: Bull & Bear Economics based on Scenic Rim Regional Council data

7.1.2 Potential Employment Yield of Underutilised Sites

The underutilised sites identified by Scenic Rim Regional Council were typically occupied by non-employing uses, such as dwellings, storage sheds or disused buildings. Therefore, in calculating the potential yield of underutilised sites, adjustments were not required to reflect the net increase in employment.

Table 7.3 summarises the assumed employment yield by employment zone for underutilised sites.

Table 7.3 Assumed Employment Yield by Zone, Underutilised Sites

Zone	Boonah / Kalbar catchment	Remainder of Boonah SA2	Beaudesert catchment	Balance of Beaudesert SA2	Tamborine Mountain / Tamborine Village catchment	Canungra catchment	Scenic Rim RC
Community Facilities	407	153	1,102	133	1,213	52	3,059
Township	-	403	-	55	135	0	593
Major Centre	0	0	1,187	0	0	0	1,187
District Centre	183	0	0	0	239	0	422
Neighbourhood Centre	0	0	0	0	81	0	81
Local Centre	149	0	0	0	0	35	185
Mixed Use	123	0	641	0	12	0	776
Industry	1,218	10	99	0	0	0	1,328
Major Tourism	0	0	0	206	0	0	206
Minor Tourism	0	0	0	0	657	15	672
Total	2,081	565	3,028	394	2,338	102	8,508

Source: Bull & Bear Economics based on Scenic Rim Regional Council data

7.1.3 Potential Employment Yield of Bromelton SDA

The Land Supply and Development Monitoring 2020 report identifies approximately 1,351 hectares of planned industrial land within Scenic Rim Regional Council, with remaining land supply concentrated within the Bromelton SDA.

These estimates align closely with previous work undertaken by Queensland Urban Utilities and Economic Associates, which identified that Queensland Urban Utilities could appropriately service 1,114 hectares of zoned land within the Bromelton SDA.

Of these 1,114 hectares of zoned land able to be serviced for industrial purposes, the assessment identified the potential to produce 943 hectares of industrial allotments, comprising:

+ Major industry: medium to high impact industry, generally occupying sites in excess of one hectare (potential allotment yield of ~617 hectares);
+ Rail dependent industry: large footprint industry that requires direct access to rail facilities (potential allotment yield of ~244 hectares);
+ Rail sidings: rail loops and spur lines to facilitate the (un)loading of rail based freight (potential allotment yield of ~58 hectares);
+ Corporate logistics: typically national based transport and logistics centres (potential allotment yield of 18 hectares); and
+ Local service centre: a retail and business hub that provides retail and commercial services to workers and businesses (potential allotment yield of ~6 hectares).

To convert industrial development areas to potential employment yield, the following employment density yields were applied per precinct:

+ Major Industry: 30 workers per hectare;
+ Rail Dependent Precinct: 20 workers per hectare;
+ Rail Sidings: 5 workers per hectare;
+ Local Services Centre: 100 workers per hectare; and
+ Corporate Logistics: 30 workers per hectare.

Based on the above assumptions, the potential employment yield of the Bromelton SDA was estimated at ~24,820 employees at build out, as summarised in Table 7.4.

Table 7.4 Potential Employment Yield of Bromelton SDA at Build Out

Industrial Precinct	Assumed Industrial Allotments (ha)	Assumed Employment Density (employment / hectare)	Assumed Employment Yield
Major Industry	617	30	18,510
Rail Dependent Precinct	244	20	4,880
Rail Sidings	58	5	290
Local Services Centre	6	100	600
Corporate Logistics	18	30	540
Total	943	26	24,820

Source: Derived from Economic Associates (2016)

Queensland Government mapping layers identify a total zoned area of ~1,800 hectares within the Bromelton SDA suited to employment purposes, significantly lower than the total land area zoned for Special Industry under the Scenic Rim Planning Scheme (~2,625.1 hectares), which appears to also capture land within the RLRPA, which falls within the Transition Precinct.

It is also noted that the data provided by Council identified no hard constraints for Bromelton. Whilst the land may face no hard constraints, it is considered highly unlikely that a land parcel of this site has no soft constraints which would ultimately limit its developability and hence employment yield.

We are of the view that the previously estimated employment yield, whilst not aligning directly with the industrial precincts in the current Bromelton SDA Development Scheme, represents a reasonable estimate of employment capacity of the Bromelton SDA at build out.

7.1.4 Summary

The following table provides a summary of the potential employment yield of vacant and underutilised land within Scenic Rim Regional Council by study area.

This analysis indicates that existing zoned employment land within Scenic Rim Regional Council can accommodate an additional 12,471 jobs, with Bromelton SDA to accommodate a further 25,000 jobs once fully built out.

Table 7.5 Estimated Employment Yield by Zone by Catchment, Scenic Rim Regional Council

Industrial Precinct	Vacant	Underutilised	Total
Boonah/Kalbar catchment	670	2,081	2,751
Remainder of Boonah SA2	297	565	863
Beaudesert catchment	1,125	3,028	4,153
Balance of Beaudesert SA2	788	394	1,182
Tamborine Mountain/Tamborine Village catchment	783	2,338	3,121
Canungra catchment	300	102	402
Scenic Rim Regional Council	3,963	8,508	12,471

Source: Bull & Bear Economics estimates

7.2 Capacity of Employment Land to Accommodate Projected Growth

7.2.1 Concordance of Land Use to Planning Scheme Zones

Section 7.1 of the report indicates that the remaining capacity of employment zoned land exceeds the *ShapingSEQ* benchmark of an additional 7,610 jobs between 2016 and 2041. The purpose of this section of the report is to determine whether the remaining zoned employment land within Scenic Rim Regional Council is of the appropriate zoning and in the appropriate locations to meet projected demand.

As previously outlined, our assessment has considered the following employment land uses to determine whether sufficient capacity exists within the planning scheme to accommodate employment growth:

+ Commercial office;
+ Retail;
+ Industry;
+ Community Facilities; and
+ Tourism.

Table 7.6 outlines the alignment of land use to relevant zones under the Scenic Rim Planning Scheme.

Table 7.6 Alignment of Land Uses and Planning Scheme Zones, Scenic Rim Regional Council

Land Use	Relevant Zones
Commercial Office	Major Centre District Centre Neighbourhood Centre Local Centre Mixed Use Township
Retail	Major Centre District Centre Neighbourhood Centre Local Centre Mixed Use Township
Industry	Industry Special Purpose Township
Community Facilities	Community Facilities Major Centre District Centre Neighbourhood Centre Local Centre Mixed Use Township
Tourism	Major Tourism Minor Tourism Mixed Use Township

7.2.2 Boonah / Kalbar catchment

Within the Boonah / Kalbar catchment (which includes the localities of Boonah and Kalbar), the additional land requirements by use to 2041 were estimated at:

- Commercial office: 0.2 hectares;
- Retail: 0.1 hectares;
- Industry: 0.7 hectares; and
- Community facilities: 0.5 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the Boonah / Kalbar catchment, after adjusting for hard constraints is:

- 0.5 hectares of centres zoned land, comprising:
  - 0.2 hectares in Boonah;
  - 0.3 hectares in Kalbar;
- 1.3 hectares of mixed use zoned land, comprising:
  - 0.0 hectares in Boonah;
  - 1.3 hectares in Kalbar;

+ 15.6 hectares of industry zoned land, comprising:
  - 15.6 hectares in Boonah;
  - 0.0 hectares in Kalbar;
+ 1.1 hectares of community facilities zoned land, comprising:
  - 0.2 hectares in Boonah;
  - 0.9 hectares in Kalbar;

This data indicates that there is sufficient vacant industry zoned land to accommodate growth within the Boonah / Kalbar catchment, even after adjusting for constraints. It is anticipated that industrial take-up will most likely be directed towards vacant land parcels within the existing industrial precinct off Boonah Rathdowney Road.

To accommodate anticipated growth in commercial office and retail floor space demand, both vacant land and underutilised sites within district centre zoned land in the Boonah / Kalbar catchment are likely to be required, as the remaining vacant sites may be insufficient to meet need, particularly if community facilities uses locate within centres zones.

The inventory at Table 6.3 identified 1.3 hectares of underutilised sites within the Boonah district centre zone, which combined with vacant sites comprising 0.2 hectares would be sufficient to meet future need.

Future community facilities demand within the Boonah / Kalbar catchment has the potential to be accommodated within underutilised sites in the district centre zone in Boonah or on underutilised sites within Boonah (2.5 hectares), such as the site at 9 Highbury Street, Boonah (0.5 hectares in size).

Our assessment would suggest that sufficient capacity exists within the Boonah / Kalbar catchment to accommodate future employment growth, with demand to 2041 likely to be predominately accommodated on vacant zoned sites or underutilised land within the Boonah district centre zone.

7.2.3 Beaudesert catchment

Within the Beaudesert catchment, the additional land requirements by use to 2041 were estimated at:

+ Commercial office: 0.5 hectares;
+ Retail: 0.5 hectares;
+ Industry: 2.4 hectares; and
+ Community facilities: 1.4 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the Beaudesert catchment, after adjusting for hard constraints is:

+ 0.7 hectares of centres zoned land;
+ 10.5 hectares of mixed use zoned land;
+ 11.1 hectares of industry zoned land; and
+ 2.4 hectares of community facilities zoned land.

Growth in demand for commercial office and retail uses is likely to be predominately accommodated within the major centre zone (which accounts for the entirety of vacant centres zoned land), or on underutilised mixed use sites immediately surrounding the major centre zone.

Industrial activity will continue to locate to the north of the catchment, likely split between the mixed use land and the industry zoned land, with a number of opportunities available to accommodate industrial growth. Growth in community facilities demand that is not accommodated within the major centre zone or on mixed use land immediately adjacent to the major centre zone could be located immediately adjacent to the existing neighbourhood centre zone.

Our assessment would suggest that sufficient capacity exists within the Beaudesert catchment to accommodate future employment growth, with demand to 2041 likely to be predominately accommodated on vacant zoned sites.

7.2.4 Tamborine Mountain / Tamborine Village catchment

Within the Tamborine Mountain / Tamborine Village catchment, the additional land requirements by use to 2041 were estimated at:

+ Commercial office: 0.3 hectares;
+ Retail: 0.3 hectares;
+ Industry: 1.4 hectares;
+ Community facilities: 0.6 hectares; and
+ Tourism: 0.2 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the Tamborine Mountain / Tamborine Village catchment, after adjusting for hard constraints is:

+ 0.2 hectares of centres zoned land;
+ 1.1 hectares of mixed use zoned land;
+ 0.0 hectares of industry zoned land;
+ 5.5 hectares of community facilities zoned land;
+ 0.8 hectares of minor tourism zoned land; and
+ 3.0 hectares of township zoned land.

At present, there is no industrial zoned land within the Tamborine Mountain / Tamborine Village catchment, with light industrial and service industry uses able to locate on either mixed use zoned land at Tamborine Mountain or township zoned land at Tamborine Village. However, the quantum of mixed use zoned land and township zoned land is sufficient to meet the needs of the catchment to 2041.

The assessment does indicate a potential shortage of suitable sites to accommodate future growth in commercial office and retail demand, based on a comparison of projected demand against remaining vacant sites. However, on further review of the data, 1.7 hectares of district centre zoned land and 0.6 hectares of underutilised neighbourhood centres zoned land was identified within Tamborine Mountain, which should be sufficient to accommodate growth to 2041, as existing uses are typically of a residential nature and able to be redeveloped.

Community facilities demand growth can be accommodated on vacant sites within Tamborine Mountain, and it is noted that all vacant sites within this zone are owned by Scenic Rim Regional Council. It is likely that community facilities employment will be accommodated on a mix of vacant and underutilised centres zoned and vacant community facilities zoned land in Tamborine Mountain.

There is sufficient capacity within existing minor tourism zoned land to accommodate future growth in tourism employment.

Our assessment would suggest that there is sufficient zoned land to accommodate employment growth within the Tamborine Mountain / Tamborine Village catchment to 2041.

7.2.5 Canungra catchment

Within the Canungra catchment (which includes the localities of Canungra and Beechmont), the additional land requirements by use to 2041 were estimated at:

+ Commercial office: 0.3 hectares;
+ Retail: 0.2 hectares;
+ Industry: 0.3 hectares;
+ Community facilities: 0.2 hectares; and
+ Tourism: 0.1 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the Canungra catchment, after adjusting for hard constraints and the recent retirement village approval on mixed use zoned land is:

+ 1.5 hectares of centres zoned land;
+ 0.0 hectares of industry zoned land;
+ 0.8 hectares of mixed use zoned land;
+ 0.2 hectares of community facilities land;
+ 0.0 hectares of minor tourism zoned land; and
+ 0.0 hectares of township zoned land.

There is sufficient capacity within the existing local centre zone in Canungra to accommodate growth in commercial office, retail and community facilities employment.

With the approval of the retirement village on mixed use zoned land, whilst the quantum of mixed use zoned land is anticipated to decrease, there will still be sufficient zoned land to accommodate industrial employment growth to 2041. The analysis identified an additional 0.1 hectares of demand for tourism related uses, with no vacant tourism zoned land identified, but 0.7 hectares of underutilised land, which could accommodate future growth.

Whilst there was no vacant zoned employment identified within Beechmont, employment growth within this community is likely to be minimal to 2041, with employment generating uses predominately locating within the locality of Canungra. However, should additional employment generating uses wish to locate within Beechmont, Council may need to consider a small expansion of township zoned land to accommodate these uses.

7.2.6 Balance of Boonah SA2

Within the balance of Boonah SA2 (which captures the localities of Aratula, Harrisville, Mount Alford, Peak Crossing, Roadvale and Warrill View), the additional land requirements by use to 2041 were estimated at:

+ Commercial office: 0.0 hectares;
+ Retail: -0.1 hectares;
+ Industry: 0.8 hectares; and
+ Community facilities: 0.2 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the balance of Boonah SA2, after adjusting for hard constraints is:

+ 3.7 hectares of township zoned land; and
+ 3.3 hectares of community facilities zoned land.

A comparison of projected demand against remaining supply suggests there is sufficient capacity within existing zones to accommodate future growth. Whilst Aratula, Mount Alford and Warrill View did not have any vacant township zoned land, Aratula and Warrill View had underutilised sites within the township zone, which could be redeveloped for employment purposes as required.

Vacant community facilities zoned land was identified in Harrisville and Peak Crossing, which could accommodate growth in community facilities demand, should these uses prefer to locate on community facilities zoned land, as opposed to township zoned land.

Our assessment would suggest that sufficient capacity exists within the balance of Boonah SA2 to accommodate future employment growth, with demand to 2041 likely to be predominately accommodated on vacant and underutilised township zoned land within all localities except for Mount Alford.

7.2.7 Balance of Beaudesert SA2

Within the balance of Beaudesert SA2 (which captures the localities of Kooralbyn, Gleneagle and Rathdowney[2]), the additional land requirements by use to 2041 were estimated at:

+ Commercial office: 0.1 hectares;
+ Retail: 0.0 hectares;
+ Industry: 1.8 hectares;
+ Community facilities: 0.2 hectares; and
+ Tourism: 0.0 hectares.

Data provided by Scenic Rim Regional Council has indicated that the quantum of vacant zoned employment land in the balance of Beaudesert SA2, after adjusting for hard constraints is:

+ 0.0 hectares of township zoned land;
+ 13.8 hectares of mixed use zoned land;
+ 0.0 hectares of major tourism zoned land; and

[2] Recall that employment within Bromelton has been assessed separately.

- 7.4 hectares of community facilities zoned land.

Whilst no vacant township zoned land remains to accommodate growth in commercial office, retail and potentially community facilities demand, 2.4 hectares of underutilised sites were identified in the township zone in both Gleneagle (0.8 hectares) and Rathdowney (1.5 hectares)[3].

Growth in industrial activity in the region is anticipated to be accommodated on mixed use land within the Commercial Industrial precinct located at Kooralbyn.

There is sufficient vacant community facilities zoned land throughout the region to accommodate future employment growth to 2041.

Our assessment would suggest that sufficient capacity exists within the balance of Beaudesert SA2 to accommodate future employment growth, with demand to 2041 likely to be predominately accommodated on vacant industry zoned land.

[3] The sum of these two areas add to 2.4 hectares due to rounding (1.53 hectares in Rathdowney plus 0.84 hectares in Gleneagle equals 2.37 hectares, which rounds upwards to 2.4 hectares).

8 Conclusions and Recommendations

The assessment identified that sufficient employment land is currently zoned within the Planning Scheme to accommodate the benchmark *ShapingSEQ* employment number of 7,610 jobs between 2016 and 2041, with the zoning of vacant and underutilised employment land and the location of employment land appropriate to meet future demand across Scenic Rim Regional Council.

Our assessment did not undertake a lot level analysis of vacant and underutilised lots in the Bromelton SDA. It is considered unlikely that the Bromelton SDA in its entirety would ultimately be developed, due to the presence of hard constraints, soft constraints or the confluence of multiple soft constraints. As a rule of thumb, typically half of an englobo parcel of land identified for industrial purposes is ultimately developed for allotments. In the case of Bromelton SDA, this would suggest approximately 900 hectares of the 1,800 hectares available for development would be occupied by industrial activity once fully built out[4].

Previous estimates which considered the land area that could be serviced by Queensland Urban Utilities identified that the Bromelton SDA could accommodate ~24,820 employees, based on 943 hectares of allotments being developed for employment generating uses. This estimate remains appropriate and can be further refined over time, as land within the estate is sub-divided and taken-up.

In the next twenty years to 2041, estimates suggest that 178 hectares of land could be taken-up within the Bromelton SDA, with the completion of the relevant section of Inland Rail acting as a catalyst for development, with upgrades to the Mount Lindesay Highway freight route also acting as a catalyst for development. This level of industrial land take-up would support employment for an estimated 5,050 persons, which includes an allowance for employment growth within the SCT Terminal to support increased activity within the Bromelton SDA. The ShapingSEQ employment benchmark has made little allowance for take-up within Bromelton SDA to 2041, meaning that these additional jobs represent employment growth over and above the additional 7,610 jobs forecast for Scenic Rim between 2016 and 2041.

The report has identified that approximately 12,471 additional jobs can be accommodated within existing appropriately zoned land within Scenic Rim Regional Council, with Bromelton SDA potentially accommodating a further ~25,000 jobs at build out.

[4] We note that the Special Purpose zone extends beyond the employment generating areas of Bromelton SDA and appears to capture land within the Transition Precinct under the Bromelton SDA Development Scheme.

Appendix A: Detailed Supply Tables

Table A.1 **Total Zoned Land (Hectares) by Locality, August 2021**

Employment Nodes	Total Zoned Land (ha)										
	Community Facilities	Township	Major Centre	District Centre	Neighbourhood Centre	Local Centre	Mixed Use	Industry	Special Purpose	Major Tourism	Minor Tourism
Major Employment Nodes in Scenic Rim											
Beaudesert	113.5	0.0	22.6	0.0	2.5	0.0	56.3	33.4	0.0	0.0	0.0
Boonah	64.5	0.0	0.0	8.8	0.0	0.0	2.0	87.2	0.0	0.0	0.0
Kalbar	9.2	0.0	0.0	0.0	0.0	3.8	4.9	0.0	0.0	0.0	0.0
Canungra	9.0	0.0	0.0	0.0	0.0	12.1	2.6	0.0	0.0	0.0	0.8
Tamborine Mountain	117.4	0.0	0.0	7.3	1.9	0.0	8.3	0.0	0.0	0.0	43.7
Other Employment Nodes in Scenic Rim											
Aratula	2.2	16.8	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0
Kooralbyn	30.6	0.0	0.0	0.0	0.0	0.2	16.8	0.6	0.0	118.5	0.0
Bromelton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2,625.1	0.0	0.0
Beechmont	3.1	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gleneagle	4.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	163.6	0.0	0.0
Harrisville	22.3	59.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mount Alford	5.3	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Peak Crossing	10.3	7.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rathdowney	6.4	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Roadvale	0.5	5.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tamborine Village	3.9	13.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warrill View	1.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Scenic Rim Regional Council (2021)

bull + bear economics

Table A.2 Vacant Land (Hectares) by Locality, August 2021

Employment Nodes	Vacant (ha)										
	Community Facilities	Township	Major Centre	District Centre	Neighbourhood Centre	Local Centre	Mixed Use	Industry	Special Purpose	Major Tourism	Minor Tourism
Major Employment Nodes in Scenic Rim											
Beaudesert	2.4	0.0	0.7	0.0	0.0	0.0	10.5	11.1	0.0	0.0	0.0
Boonah	0.2	0.0	0.0	0.2	0.0	0.0	0.0	15.6	0.0	0.0	0.0
Kalbar	0.9	0.0	0.0	0.0	0.0	0.3	1.3	0.0	0.0	0.0	0.0
Canungra	0.2	0.0	0.0	0.0	0.0	1.5	1.5	0.0	0.0	0.0	0.0
Tamborine Mountain	4.6	0.0	0.0	0.1	0.1	0.0	1.1	0.0	0.0	0.0	0.8
Other Employment Nodes in Scenic Rim											
Aratula	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0
Kooralbyn	5.2	0.0	0.0	0.0	0.0	0.0	13.8	0.0	0.0	0.0	0.0
Bromelton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1,418.4	0.0	0.0
Beechmont	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gleneagle	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	76.9	0.0	0.0
Harrisville	3.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mount Alford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Peak Crossing	0.0	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rathdowney	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Roadvale	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tamborine Village	0.9	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warrill View	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: Vacant land estimates for Canungra include the mixed use site which has recently been approved for a retirement village development.
Source: Scenic Rim Regional Council (2021)

Table A.3 Underutilised Land (Hectares) by Locality, August 2021

Employment Nodes	Underutilised (ha)										
	Community Facilities	Township	Major Centre	District Centre	Neighbourhood Centre	Local Centre	Mixed Use	Industry	Special Purpose	Major Tourism	Minor Tourism
Major Employment Nodes in Scenic Rim											
Beaudesert	9.6	0.0	8.3	0.0	0.0	0.0	15.0	3.7	0.0	0.0	0.0
Boonah	2.4	0.0	0.0	1.3	0.0	0.0	2.0	45.7	0.0	0.0	0.0
Kalbar	1.1	0.0	0.0	0.0	0.0	1.0	0.9	0.0	0.0	0.0	0.0
Canungra	0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.5
Tamborine Mountain	7.6	0.0	0.0	1.7	0.6	0.0	0.3	0.0	0.0	0.0	24.6
Other Employment Nodes in Scenic Rim											
Aratula	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0
Kooralbyn	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.7	0.0
Bromelton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1,010.8	0.0	0.0
Beechmont	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gleneagle	1.6	0.8	0.0	0.0	0.0	0.0	0.0	0.0	86.8	0.0	0.0
Harrisville	1.6	12.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mount Alford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Peak Crossing	0.8	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rathdowney	0.2	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Roadvale	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tamborine Village	3.0	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warrill View	0.2	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Scenic Rim Regional Council (2021)

Table A.4 Constrained Land (Hectares) by Locality, August 2021

Employment Nodes	Constrained (ha)										
	Community Facilities	Township	Major Centre	District Centre	Neighbourhood Centre	Local Centre	Mixed Use	Industry	Special Purpose	Major Tourism	Minor Tourism
Major Employment Nodes in Scenic Rim											
Beaudesert	57.4	0.0	0.0	0.0	0.0	0.0	6.3	0.6	0.0	0.0	0.0
Boonah	1.4	0.0	0.0	0.2	0.0	0.0	0.0	19.9	0.0	0.0	0.0
Kalbar	0.3	0.0	0.0	0.0	0.0	0.1	0.6	0.0	0.0	0.0	0.0
Canungra	1.0	0.0	0.0	0.0	0.0	7.1	1.1	0.0	0.0	0.0	0.1
Tamborine Mountain	81.2	0.0	0.0	0.5	0.0	0.0	3.8	0.0	0.0	0.0	3.8
Other Employment Nodes in Scenic Rim											
Aratula	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0
Kooralbyn	6.8	0.0	0.0	0.0	0.0	0.0	2.4	0.2	0.0	6.7	0.0
Bromelton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Beechmont	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gleneagle	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Harrisville	0.3	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mount Alford	4.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Peak Crossing	4.9	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rathdowney	2.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Roadvale	0.2	4.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tamborine Village	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warrill View	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Scenic Rim Regional Council (2021)