



Swan Hill Rural City Council

Industrial Futures Discussion Paper

May 2025

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Instructions	
Instructing Party	Swan Hill Rural City Council
Purpose	Swan Hill and Robinvale Industrial Futures Discussion Paper
Prepared By	Simon Micmacher (Director) Sam Granger (Strategic Planning Analyst)
Disclaimer	<i>This report has been prepared for the exclusive use of the party to whom it is addressed and for no other purpose. No responsibility is accepted for any third party who may use or rely on the whole or any part of the content of this report. It should be noted that any subsequent amendments or changes in any form to this report would only be notified to and known by the parties to whom it is addressed. This report has been carefully prepared by Charter Keck Cramer Strategic Research and the information contained herein should not be relied upon to replace professional advice on specific matters.</i> Charter Keck Cramer 2025

Seeking Your Views: Shaping an Industrial Future

Swan Hill Rural City Council is exploring the future of industrial land and industrial based industries and we want to hear from you.

Industrial businesses, whilst not often prominent in everyday life, are essential for providing housing, energy, food, waste services and transport for Swan Hill and the wider Mallee Region's communities. Swan Hill's industrial enterprises are also critical in ensuring our strong agricultural sector is able to provide

Swan Hill's industrial land is largely concentrated in Swan Hill and Robinvale, with both traditional and new industries located throughout. Industrial land is also located in supporting precincts in Lake Boga, Nyah and Woorinen South.

As economic investment and industrial enterprises grow and expand, securing future industrial land will be critical in sustaining the municipality's economy and community.

Swan Hill's industrial sector is facing challenges. Demand for industrial land has been rising in Swan Hill over the past 15 years, with vacant land in Karinie Street and Quin Drive shrinking. Identifying well located land for industrial development is paramount to ensure demand continues to be met. Likewise, there is a need to balance the growth of industry with the need to increase housing supply, particularly in Robinvale.



Did you know?

Swan Hill's industrial sectors employ over **2,200 workers** and are responsible for close to **30% of our economic output**, generating **over \$915 million per annum**.

We invite your views

- What do you see the future of our industrial precincts to be?
- Do you think the identified expansion areas are appropriate?
- How can we support established industry to grow and innovate?
- How can we best support interaction between industrial and agricultural enterprises?
- How can we be more inclusive and supportive of the temporary key workers working in Swan Hill's industrial areas?

1.0 Project Purpose and Background

Swan Hill Rural City's industrial sector is essential to the welfare, prosperity of our community.

Swan Hill Rural City Council is responsible for facilitating an efficient planning system that encourages investment and employment growth by ensuring that there is a supply of industrial land to meet the needs of enterprise, industry, and community.

The development of the *Swan Hill Industrial Land Use Strategy 2025* will set a clear direction for industrial lands across Swan Hill and Robinvale to 2040.

The Strategy will provide residents, businesses and stakeholders greater clarity on industrial land use and development while simultaneously ensuring new development makes a positive contribution to the amenity and Swan Hill's environment.

This paper is the first step in the development of our strategy that will guide the long-term direction of Swan Hill's industrial lands and their role in our prosperity.

1.1 Strategy Delivery

The development of the Strategy incorporates a series of phases that combine industry and public engagement, data development and analysis.

We are now at step 1 exploring issues and opportunities for our industrial land through the discussion paper process.

1

Industrial Lands Discussion Paper

..... Community & Industry Engagement

2

Draft Industrial Land Use Strategy

..... Community & Industry Engagement

3

Final Industrial Land Use Strategy

4

Implementation

1.2 Project Goals

The project is guided by key questions and objectives as detailed below. We want to understand your views on these questions and how we can secure our long term economic future.

1. *To further recognise the role and importance of the municipality's industrial sector.*
2. *To identify opportunities to continue to support the growth and development of the municipality's industrial sector.*
3. *To identify and quantify industrial land development trends within Swan Hill and Robinvale.*
4. *To quantify the extent to which land zoned for industrial uses in Robinvale and Swan Hill is either used for industrial purposes or is vacant.*
5. *To identify why vacant industrial land has not been developed by exploring the underlying land use, economic rationale or other environmental constraints for industrial land vacancy.*
6. *To ensure that there is sufficient industrial land supply within Robinvale and Swan Hill to accommodate future needs.*
7. *To identify long term industrial land supply solutions that position the municipality to respond to future demand.*
8. *To enact appropriate land and policy reforms to secure the prosperity of the municipality's industrial sector.*

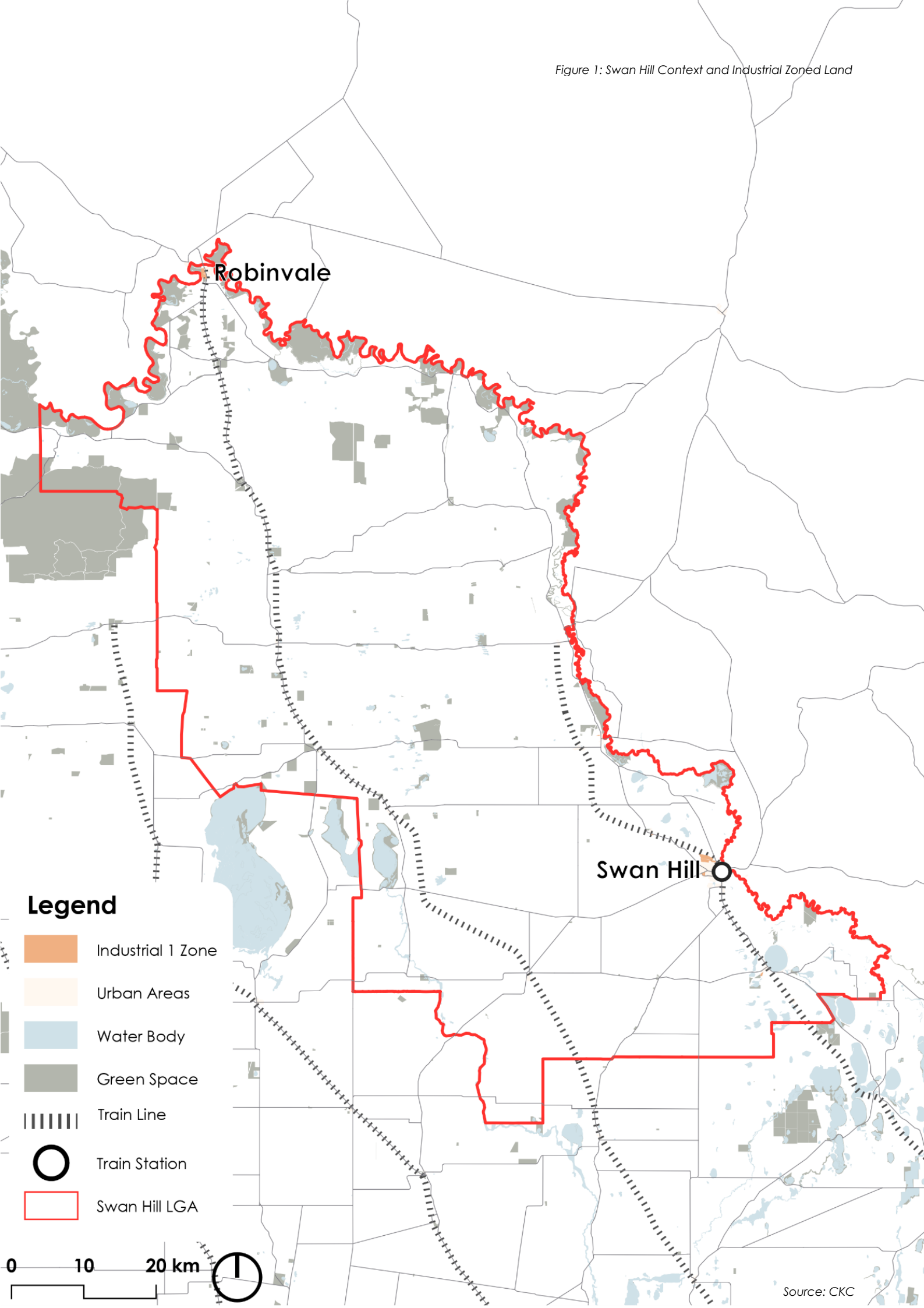
1.3 Purpose of the Discussion Paper

The report details comprehensive data and analysis on industrial land and land use in Swan Hill and Robinvale with the aim of identifying trends, potential land use challenges and options to support growth.

The evidence and analysis detailed in this report will inform the *Swan Hill Industrial Land Use Strategy 2025*.

We welcome further information that provides insight on trends and issues confronting our industrial sector.

Figure 1: Swan Hill Context and Industrial Zoned Land



2.0 Industrial Land State of Play

2.1 Importance of industrial industries

Industries in industrial areas are a vital source of employment income and economic activity for our community.

Our municipality's European economy was founded during the mid-1800s, with Swan Hill growing as the major town settlement in this era. As our community grew, agricultural activity in the form of the fruit, grape, grain, dairy and vegetable farming became the region's core economic activities. Agricultural growth and community development spawned complimentary processing and manufacturing industries including the establishment of plaster, brick, cordial, dairy, tomato factories, as well as flour mill and sawmills. Since then, Swan Hill's industrial areas have continued to grow and diversify. Today our industrial areas provide critical technological, service and material support for local industry while also incorporating enterprises that export building, household, food and farming supplies across the nation. In 2023, industrial sectors¹ generated an estimated \$2.2 billion in economic output for the municipality, an increase of \$300 million since 2018 at an annual average growth rate of 2.8%.

Agriculture is Swan Hill's leading industry, producing \$1.3 billion in economic output in 2023, accounting for 58% of the municipality's economic output. Manufacturing and construction comprise Swan Hill's next leading sectors, contributing \$297M and \$237M of economic output respectively at 2023 (Economy id.).

Our municipality encompasses both established and growing industry sectors that are a core source of employment, income and economic activity for our community. In an age of uncertainty in which there is emerging volatility in international trade, local industrial areas have a core role in supporting the economic resilience and economic capacity of local communities. Ensuring industrial land and ancillary uses are available and affordable is therefore both essential to the prosperity of new and existing businesses but also to national resilience.

Proform Solutions

Proform Solutions is a plastic resin manufacturer producing mould designs and polyethylene powders. They have operated within Swan Hill over the past 20 years in Swan Hill. In the recent past, Proform has updated and expanded its premises to incorporate more and contemporary floor space. Proform Solutions' site is one of Karine Street's larger lots at 13,000 sqm with modern industrial built-form.

Figure 2: Proform Solutions



Source: CKC, Proform Solutions

¹ Industrial sectors include Agriculture, Forestry and Fishing, Manufacturing, Construction, Transport, Postal and Warehousing, Wholesale Trade, Electricity, Gas, Water and Waste Services and Mining

2.2 Industrial Land Analysis Methodology

To ensure the long term viability and success of the municipality's industrial sector this discussion paper reviews the current status of industrial land in Swan Hill and Robinvale. To do so, the paper examines the status of industrial land to determine whether industrial land is occupied or vacant.

Lots are assigned one of four classifications:

Vacant Lots

- ✦ Lots deemed to lack any current use or development.

Vacant Constrained Lots

- ✦ This a lot that is vacant that is subject to constraints that will restrict or, in some cases, eliminate future development potential. Vacant constrained lots are subject to constraints identified in the Industrial Land Classification Framework below.

Occupied Lots

- ✦ Lots occupied by an active industrial use.

Non-industrial Use in Industrial Zoned Land

- ✦ Land located within industrial zoned land that is currently used for a non-industrial purpose. In most cases in Swan Hill, this is either an agricultural or residential use. This land may in the future represent an opportunity for industrial expansion owing to its industrial zoning.

Industrial Land Classification Framework

To distinguish between vacant industrial land that incorporates the attributes to support industrial expansion and vacant land that is subject to attributes that are likely to constrain future development.

Potential attributes that may constrain future development are detailed in the table below.

Table 1: Industrial Land Classification Framework

Constraint	Description
Buffer areas	Land acting as a buffer between industries and incompatible uses, such as residential development. Buffers can limit how much land can be used for development.
Environmental	Land incorporating native vegetation and areas of cultural heritage sensitivity is subject to conservation measures and assessments that can constrain potential development.
Topography	Substantial changes in elevation of sites including significant sloping present a potential constraint for development.
Bushfire Hazard	Land subject to the Bushfire Management Overlay is subject to bushfire risk. The BMO represents a potential constraint on future industrial development.
Flooding	Land subject to flooding risk. The flooding average recurrence interval (ARI) represents the likelihood of a flooding event to occur and poses potential constraints on future industrial development.
Size	Insufficient lot size may potentially constrain the range of potential development formats.
Access	Land with limited safe access points for a variety of vehicles can constrain the types of development possible.
Proximity to residential areas	Sites in close proximity to residential development have the potential to impact upon the amenity of residents. Potential impacts limit the type of development permitted.

Commercial and Industrial Zones Review 2018

This discussion paper is informed by and follows on from SED Regional Advisory's review of commercial and industrial land in 2018.

The 2018 review details the level of vacancy, types of uses and key issues of commercial and industrial land across Swan Hill and Robinvale.

The report identified a number of key insights pertaining to industrial land.

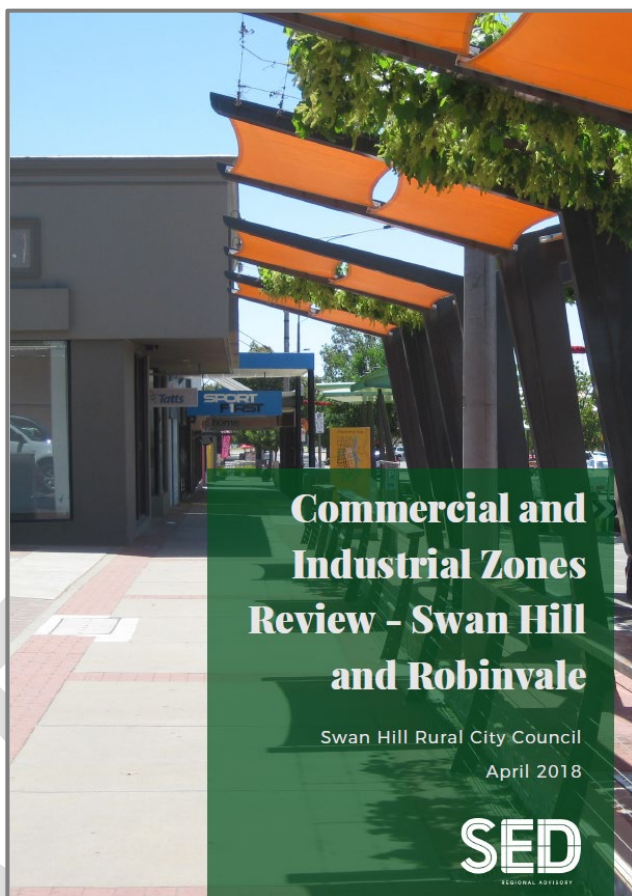
In Swan Hill, the review found that Karinie Street Industrial Estate included 43 hectares of land that was being used for residential and agricultural purposes, as well as 36.3 hectares of vacant land supply at the time. Quin Drive Industrial Estate incorporated 0.47 hectares of vacant land supply. In total, the review identified 40.6 hectares of IN1Z land that could be activated for future development in Swan Hill at 2018.

In Robinvale, 34 hectares of IN1Z land was found to be vacant. However, when evaluated against potential development constraints, only 3.95 hectares of this land was considered suitable for development.

The review considered the following as constraints on industrial development: land within flood areas, dense vegetation, road access, subdivision, frontage. It did not account for potential constraints resulting from bushfire management overlays, areas of cultural heritage sensitivity and topographical conditions.

Further details of the review's findings and policy implications can be found on page 32.

Figure 3: Commercial and Industrial Zones Review 2018



Source: SED Regional

2.3 Swan Hill and Robinvale Industrial Land Review

The following examines industrial land within the townships of Swan Hill and Robinvale.

At 2025, there is 249 hectares of zoned industrial land across the municipality. Over 90% of the municipality's zoned industrial land is located in Swan Hill and Robinvale.

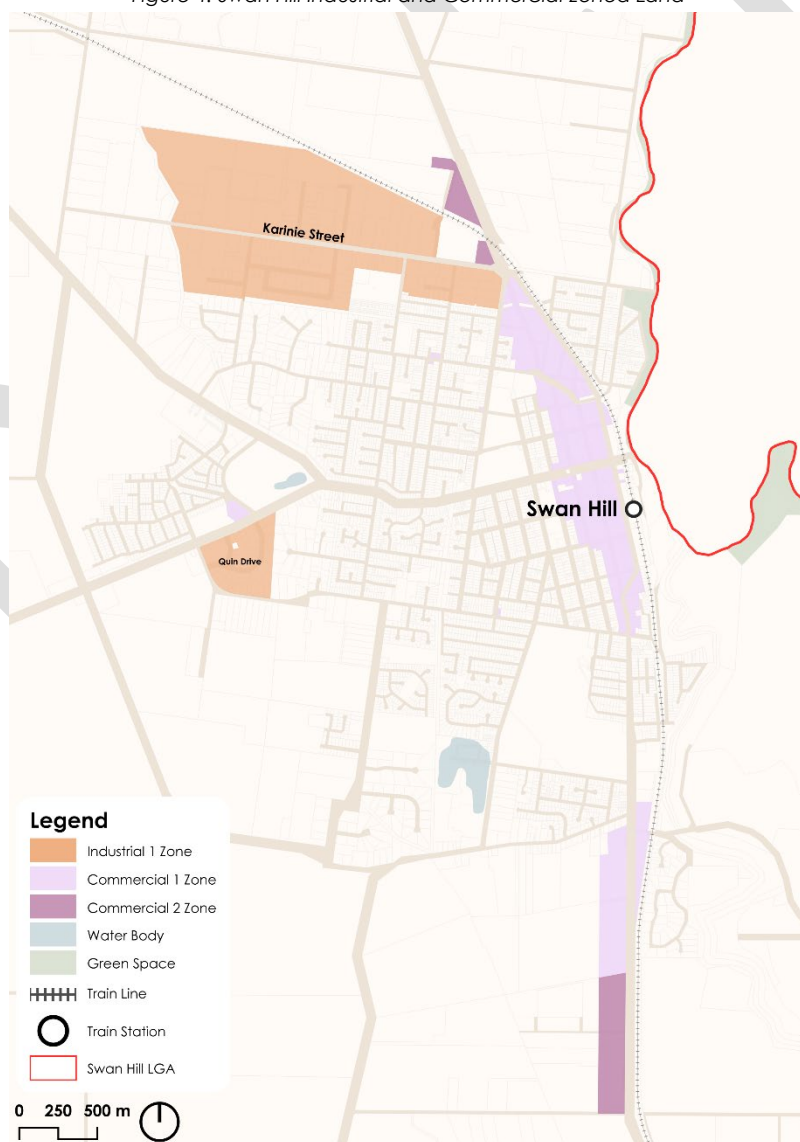
The township of Swan Hill includes two industrial precincts at Karinie Street and Quin Drive. Robinvale includes a single industrial estate to the west of the town centre along Moore Street.

The following reviews the status of land and industrial uses in each of these precincts which constitute the primary focus for this discussion paper and the future strategy.

Swan Hill

Swan Hill's industrial zoned land comprises 160 hectares of zoned industrial land which is spread across two distinct precincts: the Karinie Street and Quin Drive industrial estates. These precincts support a diversity of businesses including major waster, agricultural supply, automotive, manufacturing, energy and chemical and logistics enterprises. The township also incorporates two areas of commercial 2 zoned land comprising approximately 21 hectares. The area separate from Swan Hill's industrial estates, towards its southern entrance, incorporates a number of light industrial uses, as well as undeveloped land.

Figure 4: Swan Hill Industrial and Commercial Zoned Land



² Figures are based upon industrial land within lots and exclude roads and transport corridors

Karinie Street Industrial Estate

The Karinie Street industrial estate is the municipality's largest industrial area. The precinct is characterised by its long-established large format businesses that support construction supply, manufacturing, machinery, automotive, and household supply uses. Businesses within Karinie Street provide critical inputs to support the growth of the township, and regional industries.

Karinie Street is the precinct's primary thoroughfare and access point. The precinct incorporates a number of larger lots that support the storage, administrative and industrial uses of enterprise. Most lots maintain a singular entrance and access point, however, many situated south of Karinie Street have both front and rear access points, particularly those with larger format lots.

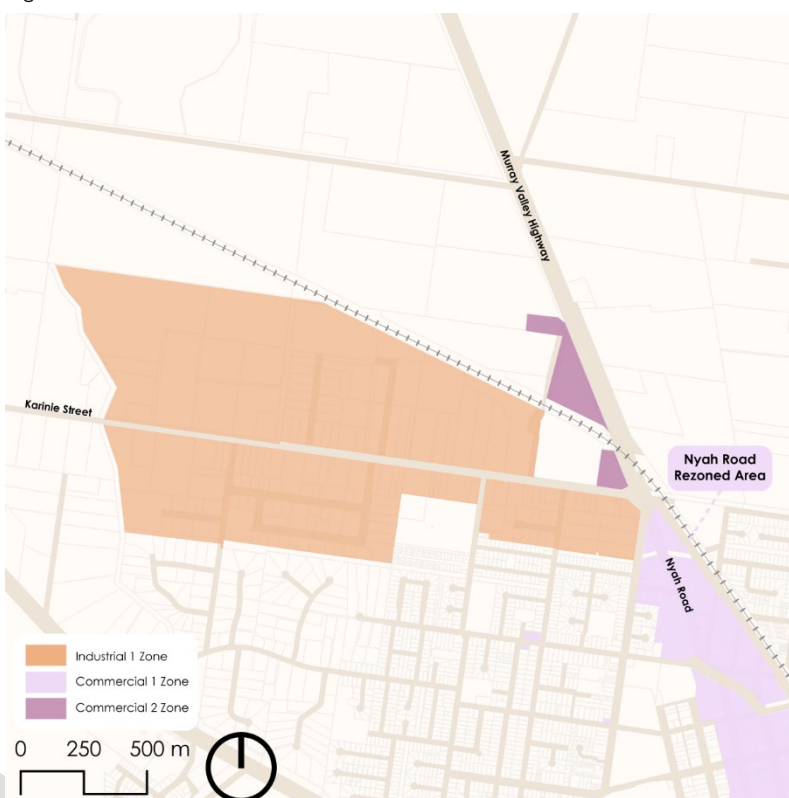
The railway abuts the industrial estate to the north.

The surrounding area is comprised of agricultural land to the north and residential neighbourhoods to the south. This is with the exception of a small section of Commercial 2 Zoned land to the north east. This includes the saleyard land, the future of which is currently under review.

Agricultural land to north of the industrial area and railway line is subject to an Environmental Significance and Land Subject to Inundation Overlay (potentially limiting this land as a future expansion option).

Karinie Street industrial estate is set to receive significant street improvements as part of a wider reconstruction project. The project's upgrades include drainage improvements, kerb and channel replacements, an all abilities shared-path, road line-marking and improved lighting.

Figure 5: Karinie Street Industrial Estate Profile



Source: CKC

Figure 6: Karinie Street Industrial Estate Firms

Ranbuild – Shed builder

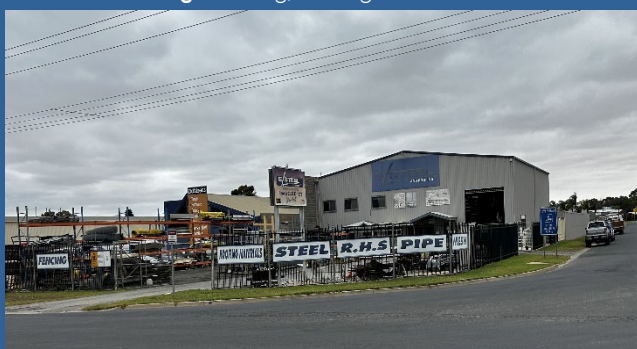


Swan Hill Gymnastics Club – Gymnastics club

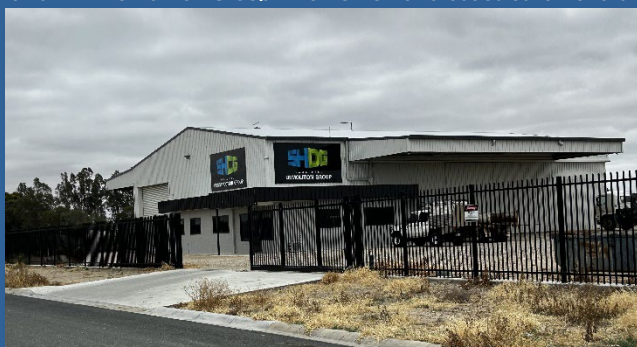


Source: CKC

Elsteel and Roofing – Roofing, fencing and steel wholesaler



Swan Hill Demolition Group – Demolition and asbestos removalist



Quin Drive Industrial Estate

Quin Drive industrial estate, located in the south of Swan Hill, holds a distinct role within Swan Hill's industrial landscape, acting as its primary service precinct. Quin Drive is oriented towards population and town services, with a number of mechanics, electricians, engineering consultants and waste management businesses located throughout the precinct.

The area is relatively impermeable, with access from 3 entrances along Gray Street and Sea Lake – Swan Hill Road from the north and the west. The eastern edge is inaccessible as it is directly adjoined by residential development.

Large front setbacks, fencing and singular access points remain the predominant lot structure found throughout the precinct. The lot situated on the corner of Gray Street and Sea Lake-Swan Hill Road is the exception to this, with a much larger footprint and multiple access points. A number of lots situated between Gray Street and Quin Drive to the South also maintain multiple access points.

Potential development of the industrial precinct appears constrained due to high occupancy and surrounding residential development.

Lots to the south west of Gray Street are undeveloped. These are, however, zoned in the General Residential Zone as part of the South West Development Precinct Master Plan.

The future development of Quin Drive will entail the renewal and redevelopment of existing sites.

Figure 7: Quin Drive Industrial Estate Profile



Source: CKC

Figure 8: Quin Drive Industrial Estate Firms

Cleanaway – Waste management service provider



Lakeside Packing – Packaging manufacturer

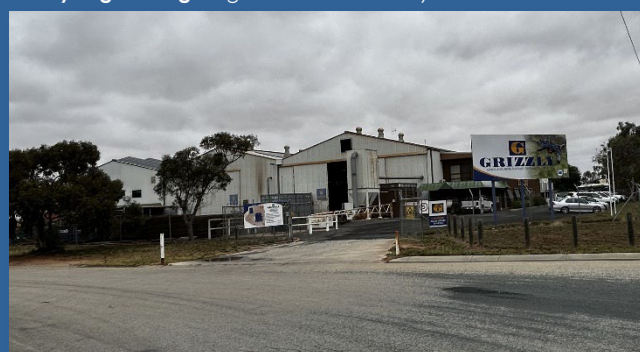


Source: CKC

Veolia – Waste management service provider



Grizzly Engineering – Agricultural machinery manufacturer



Swan Hill Industrial Land Supply

Swan Hill's 160 hectares of industrially zoned land is currently comprised of 214 lots. 175 lots are located in Karinie Street and 39 in Quin Drive. Future development and in particular subdivision will create additional lots.

Approximately, 55% of lots support active industrial uses. 40.5 hectares (25%) of industrial land currently supports either agricultural or residential purposes.

Parcels to the south of Karinie Street are largely developed. Vacant land is primarily located in the north west of the precinct. This land represents the area with the greatest potential to support new industrial development within the town of Swan Hill.

Since the initial 2018 review, Quin Drive has seen the development of its remaining undeveloped land and vacant buildings. At 2025, Quin Drive is considered fully developed. New development will entail redevelopment and intensification of existing sites.

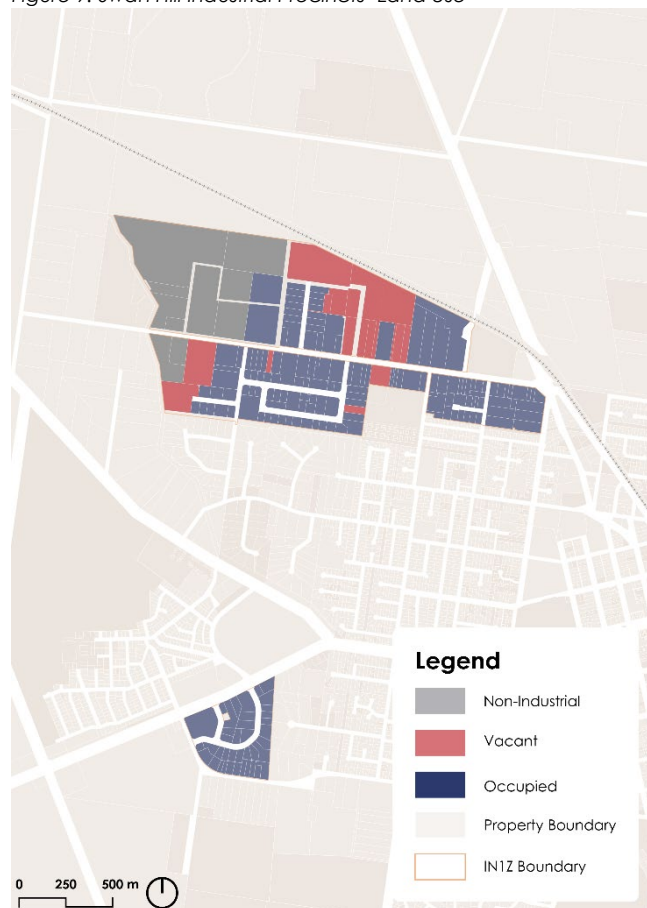
Table 3: Industrial land audit summary

Status	Swan Hill	Robinvale	Total
Occupied	88.6ha	18.5ha	107.1ha
Vacant	31.4ha	48.3ha	79.7ha
Non-Industrial	40.5ha	-	40.5ha
Vacant Building	-	4.6ha	4.6ha
Total	160.4ha	71.5ha	232 ha

Table 4: Swan Hill Lot Size Analysis

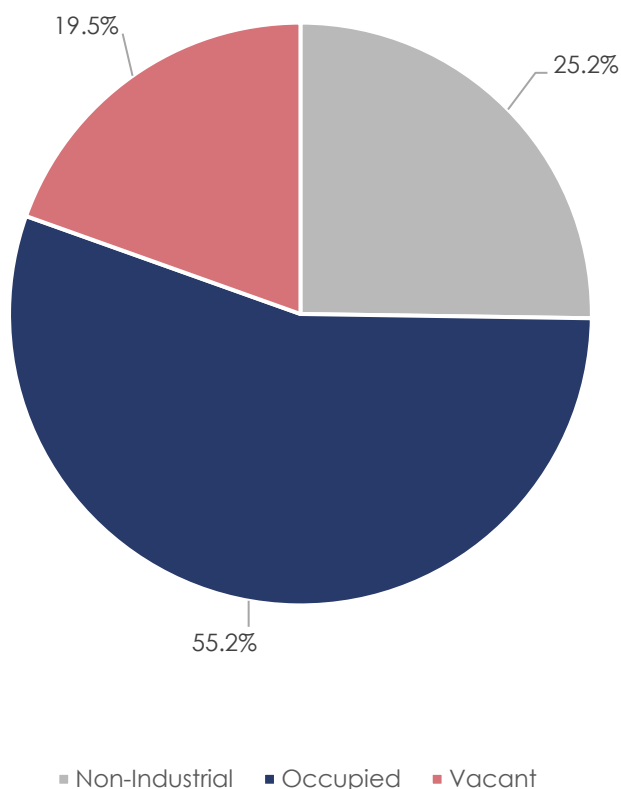
Status	Median Size (sqm)	Mean Size (sqm)	Lots
Karinie Street	3,400	8,300	175
Occupied	3,100	4,700	151
Vacant Land	11,400	20,900	15
Non-Industrial	25,400	45,000	9
Quin Drive	2,700	3,700	39
Occupied	2,700	3,700	39
Vacant	-	-	-
Total	3,400	7,500	214

Figure 9: Swan Hill Industrial Precincts' Land Use



Source: CKC

Figure 10: Swan Hill Industrial Precincts' Land Use Analysis



Source: CKC

Land Consumption in Karinie Street Industrial Estate (2007 – 2024)

Karinie Street is Swan Hill's major industrial area expansion area supporting industrial growth and development.

The precinct currently incorporates a total of 69.8 hectares of available land supply. This includes land identified as vacant and land currently used for non-industrial purposes.

During the period since 2007, approximately 24.6 hectares of land was developed for industrial uses across 5 key sites. This is indicative of an annual average development rate of 1.5 hectares between 2007 and 2024.

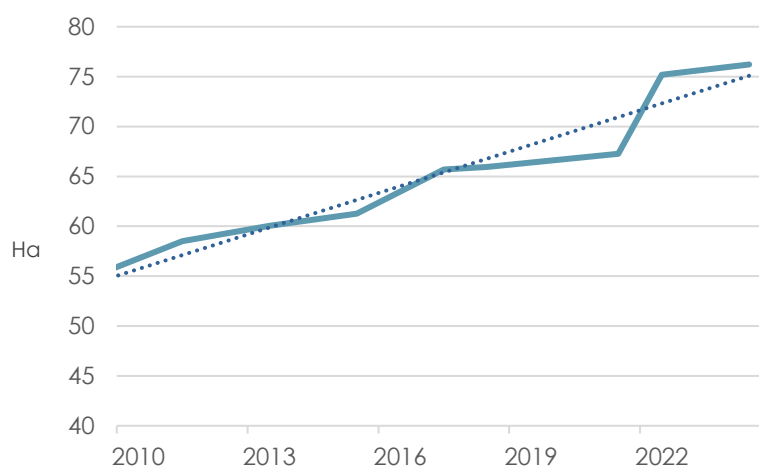
Over this time, the precinct experienced periods of significant development including the development of 8 hectares of land between 2021 and 2022. There were also periods of minimal change.

Mooted and approved proposals since 2022, suggest that the precinct is on the verge of a new wave of industrial development and growth. The impact of the delivery of potential permits on the need for new industrial land is discussed below.

Table 5: Karinie Street land consumption – 2007 - 2024

Land consumption (2007 – 2024)	
Land developed (ha)	24.6
Annual average land development (ha)	1.5
Available vacant land (2025) (ha)	31.4
Non-industrial uses (2025) (ha)	40.5
Total land supply (ha)	71.8

Figure 11: Karinie Street total land consumption (ha) – 2010 – 2025



Source: CKC

Figure 13: Karinie Street - 2007



Source: CKC, Google Earth

Figure 12: Karinie Street - 2024



Source: CKC, Google Earth

Swan Hill Industrial Land Outlook

A key focus for the municipality and this project is to determine the need for new industrial land. The following applies a series of development assumptions to explore the need for new industrial land within the township of Swan Hill.

As discussed, the Precinct is set to undergo a new wave of development as is evident in the volume of subdivision and development applications. The delivery of these applications will change the overall outlook for land supply in Swan Hill and options for new and expanding industries.

In order to understand how long this supply may last for and whether additional supply is needed for Swan Hill's immediate and long-term future, a base, medium and high-growth scenario have been conducted.

Base Case³

Karinie Street includes 72 hectares of potentially developable land. Assuming that Karinie Street maintains the same rate of consumption since 2007, Karinie Street, under base conditions, incorporates approximately 50 additional years of industrial supply.

Medium Growth Case

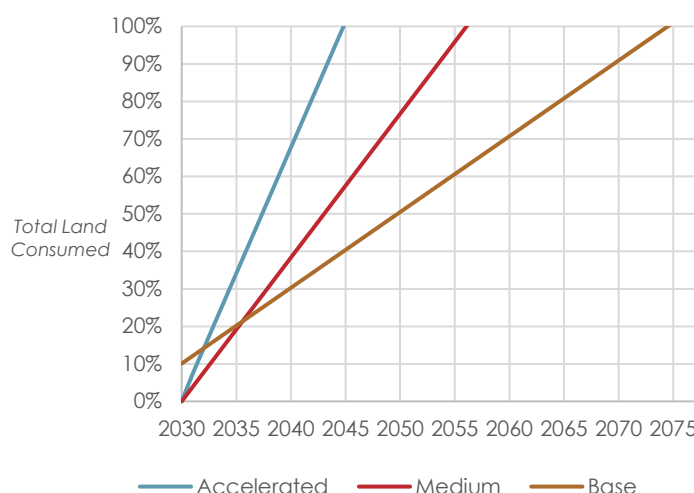
Since 2022, Karinie Street industrial estate has been subject to 10 planning permit applications for industrial development and subdivision. This includes 6 applications to subdivide vacant parcels for future industrial purposes and 4 applications for industrial development of a vacant site. The future delivery of these permits will see the development of approximately 34 hectares of land resulting in 37.8 hectares of vacant land at the time of development.

Assuming (a) that all permitted subdivisions and development applications are delivered by 2030 and that (b) post 2030 development reverted to the long-term development average of 1.5 hectares per annum, Karinie Street under medium case growth conditions incorporates approximately 26 years of industrial land supply. When current applications are delivered vacant industrial land for the township of Swan Hill will comprise 8 lots in total making the township potentially vulnerable to a limited diversity of supply.

Accelerated Development Case

Since 2021 industrial development has accelerated to over 2 hectares per annum. If permitted applications were to be developed by 2030 industrial consumption would theoretically grow to 2.5 hectares per annum. Assuming that future take up of vacant industrial land in Karinie Street averages 2.5 hectares per annum the township incorporates only 15 years of industrial land supply from 2030. Given the volume of permit applications and the scale of post 2020 industrial development this is a highly credible scenario.

Figure 14: Percentage of projected land consumed by year



Source: CKC

Table 6: Karinie Street base case land consumption

Base case	
Annual average consumption rate (ha)	1.5
Vacant land supply (ha) (2025)	71.8
Period of land availability (yrs)	50

Table 7: Karinie Street medium case land consumption

Medium case	
Land subject to development processes (ha)	33.7
Annual average consumption rate (ha)	1.5
Vacant land supply (ha) (2030)	37.8
Period of land availability (yrs)	26

Table 8: Karinie Street Accelerated Development Case land consumption

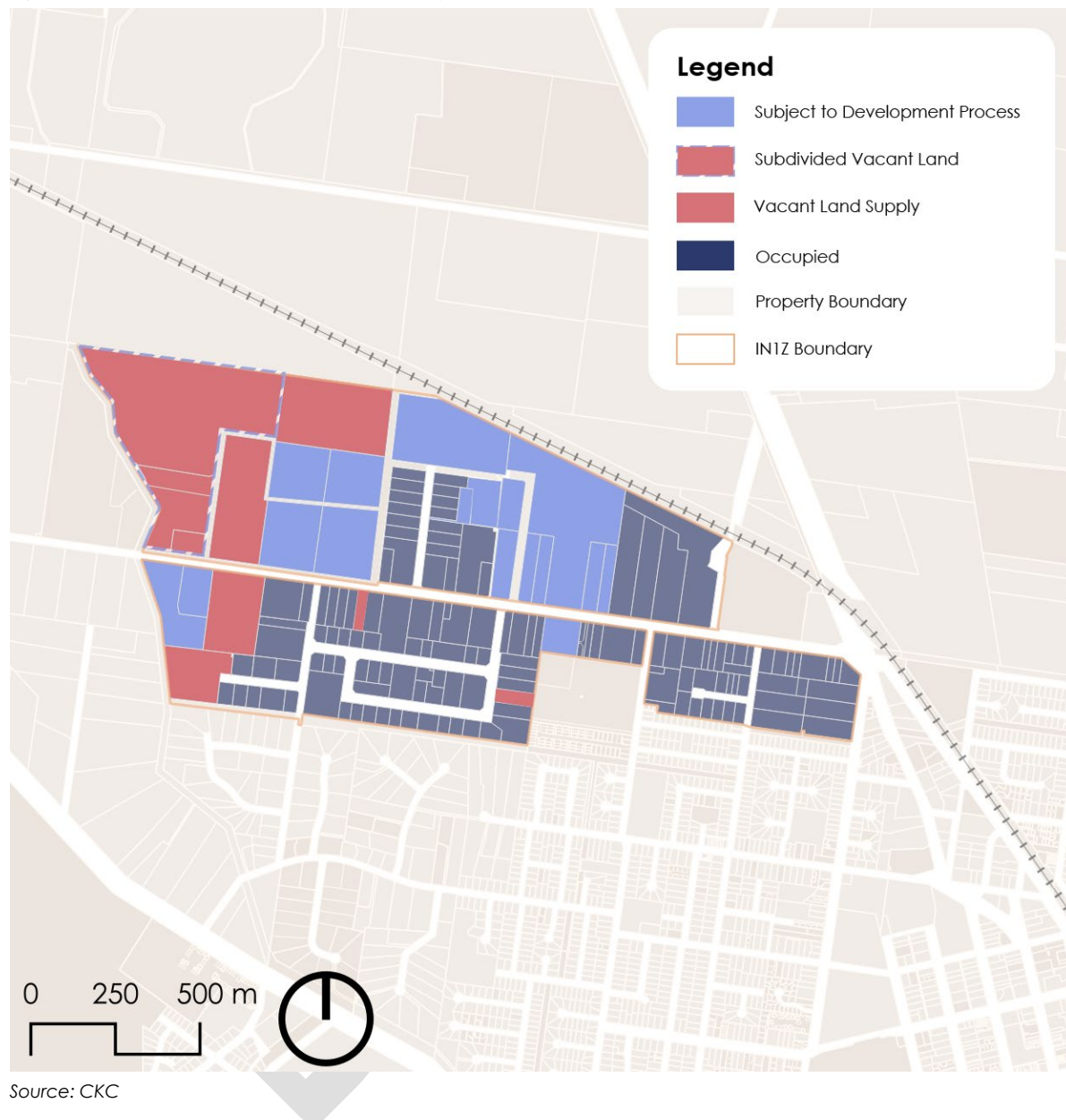
Accelerated Development Case	
Land subject to development processes (ha)	33.7
Annual average consumption rate (ha)	2.5
Vacant land supply (ha) (2030)	37.8
Period of land availability (yrs)	15

³ The method used for modelling land consumption calculates the percentage of total land consumed in Karinie Street by dividing the vacant land by an annual average consumption rate. In the base case, development starts at 10% as consumption has been calculated from 2025, due to lots currently subject to development processes being considered as vacant land.

Land classification

The map below displays vacant land supply, subdivided vacant land and land that is subject to development processes. Land that is categorised as subject to development processes encompasses parcels that are subject to proposals for industrial subdivision and/or development since 2022. The medium and accelerated growth scenarios assume that current permits will be delivered by 2030 reducing the volume of vacant land in Swan Hill to 37.8 hectares at this time.

Figure 15: Karinie Street vacant land and land subject to development



Future Options: Swan Hill Investigation Areas

Assuming that current permits are acted on, there is the potential that the municipality may experience both a shortage of industrial land and a limited number and diversity of vacant lots within Swan Hill within the medium term (10 to 15 years).

Karinie Street is the municipality's leading and most active industrial area. As such, a constraint on available industrial land will limit investment, job growth and output in the community which is a community that is highly dependent on production for its income.

To ensure long term land supply is available and appropriate for future industrial expansion and development, potential industrial expansion investigation areas have been identified.

Investigation Area 1 to the west of Karinie Street spans 107 hectares across two lots. IA1 is subject to drainage issues which may constrain its development potential.

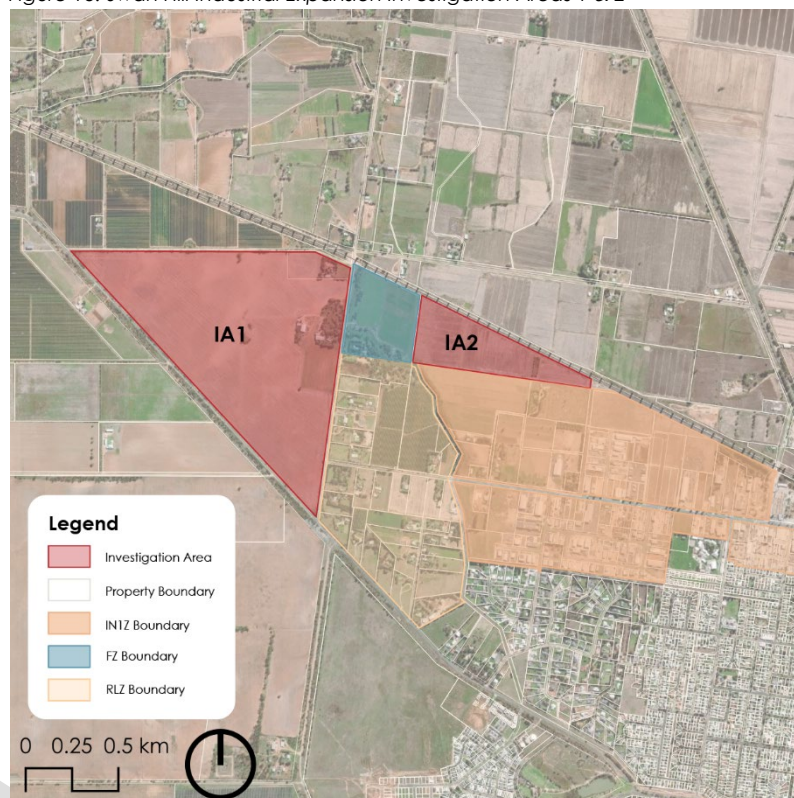
Investigation Area 2 encompasses 20 hectares on a singular lot. IA2 is subject to cultural heritage sensitivity which may constrain its development potential; however, the locations of sensitivity are within specific areas. Otherwise, these areas maintain minimal environmental and regulatory constraints, making them potential candidates for industrial expansion.

Together the expansion areas incorporate near on 128 hectares of land representing between 50 and 85 years of potential industrial land supply.

Figure 17: Investigation Area 1 Streetview



Figure 16: Swan Hill Industrial Expansion Investigation Areas 1 & 2



Source: CKC

Table 9: Swan Hill Expansion Investigation Areas 1 & 2

Investigation Area	Area (ha)	Lots	Potential supply (yrs)
Investigation Area 1	107.6	2	74
Investigation Area 2	20.2	1	14
Total	127.8	3	88

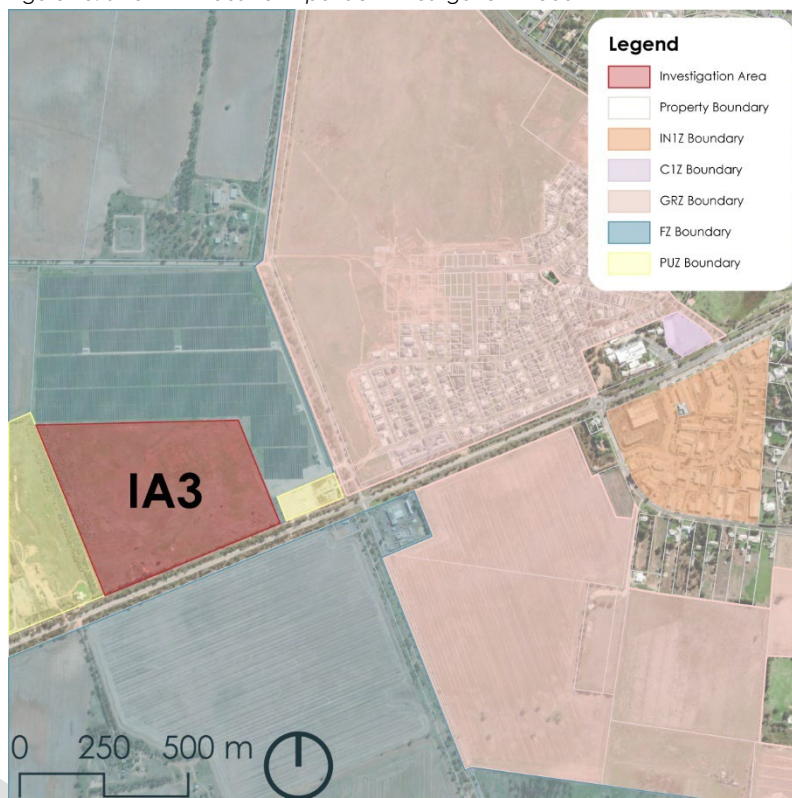
Future Options: Swan Hill Investigation Areas

Investigation Area 3 to the west of Quin Drive Industrial Estate encompasses approximately 25 hectares on a singular lot. The area directly abuts the Swan Hill land fill.

At 2025, IA3 is not subject to any overlays that restrict its development. However, its proximity to residential areas may limit its potential for industrial development in light of recent amendments to the Separation Distance Guideline by the EPA.

Investigation area 3 represents between 10 and 17 years of potential industrial land supply.

Figure 18: Swan Hill Industrial Expansion Investigation Area3

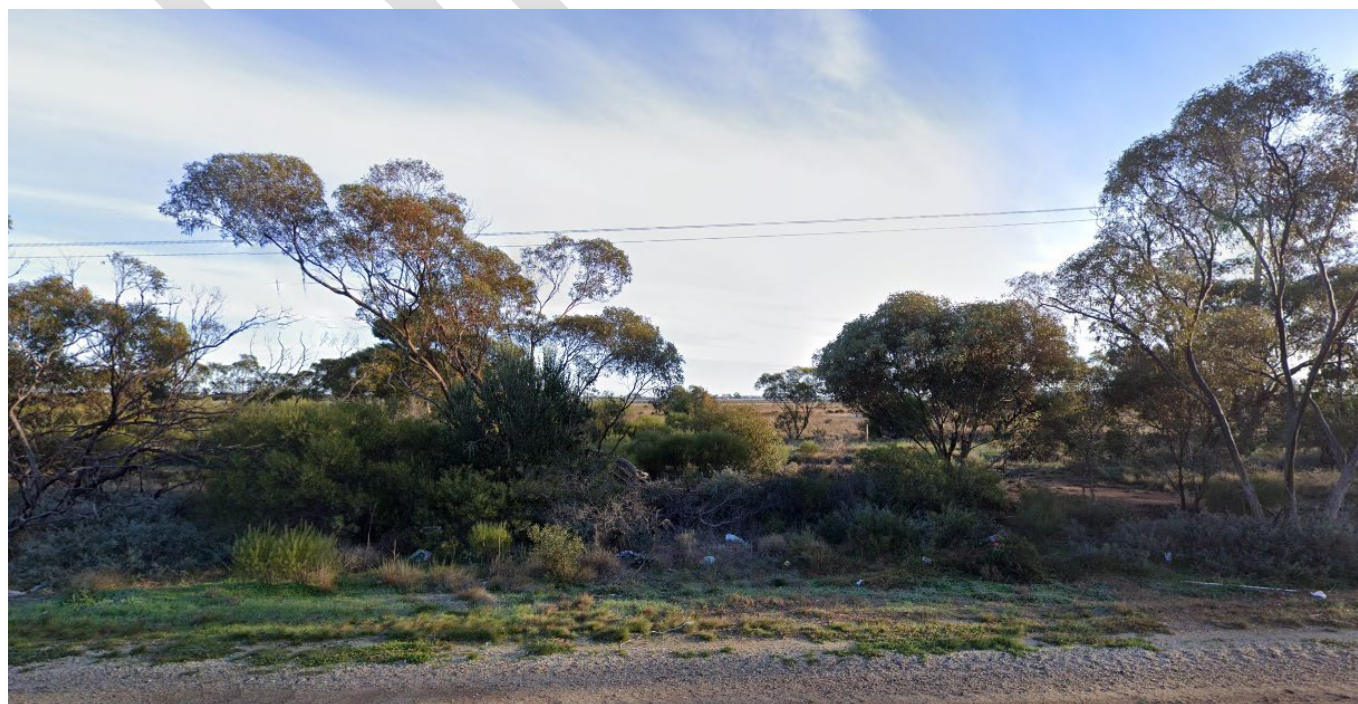


Source: CKC

Table 10: Swan Hill Expansion Investigation Area

Investigation Area	Area (ha)	Lots	Potential supply (yrs)
Investigation Area 3	24.5	1	17

Figure 19: Investigation Area 3 Streetview



Industrial Land State of Play - Swan Hill (Township)

Key Issues

Karinie Street Industrial Estate

- Karinie Street is our largest industrial area that supports major manufacturing, trade supply and service uses.
- Industrial uses in Karinie Street is steadily expanding as our economy grows.
- The area is currently subject to a series of proposals that will grow our industrial economy.

Quin Drive Industrial Estate

- Quin Drive Industrial Estate is fully occupied.
- The precinct is bound by uses which means that it can no longer expand.

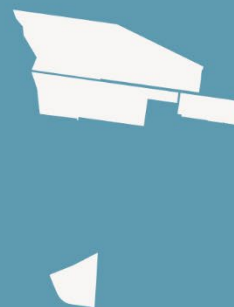
Opportunities

- There is the potential to identify future expansion land in direct proximity to Karinie Street enabling the precinct and Swan Hill's economy to grow.
- We have identified Investigation Areas 1 and 2 as potential expansion areas.



We invite your views

- What do you see as the future of Karinie Street and Quin Drive?
- Do you think IA1 and IA2 are appropriate locations for expansion?
- Do you know of any other areas that are suited for industrial expansion?
- How can we support the growth of our industrial sector?



Robinvale Industrial Area

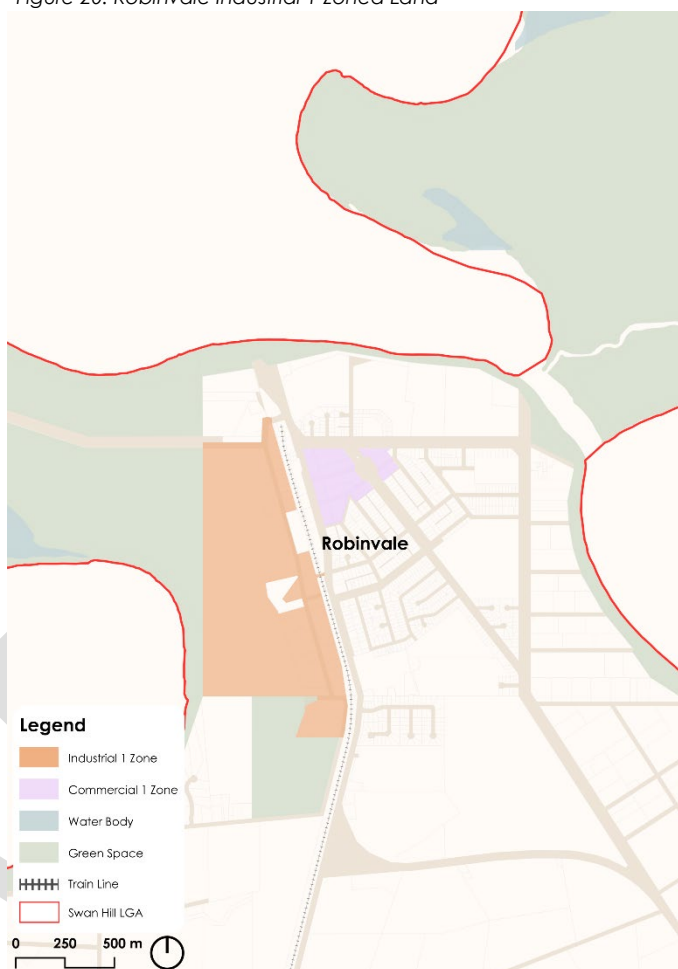
Robinvale's industrial precinct is Swan Hill's second major industrial node, encompassing near on 71.5 hectares of land. Adjacent to the town centre, the industrial precinct is a linear precinct concentrated along Moore Street Robinvale. The precinct comprises 45 lots of varying size and shape.

The precinct supports a small number of enterprises that include national industrial businesses such as Lindsay Australia and Dunlop Tyres, as well as smaller local businesses including mechanics and a distillery.

The precinct features a linear layout, centred on Moore Street. The area abuts the trainline, with bushland to the west acting as a significant buffer to the Murray River. There are residential and commercial uses to the east of the precinct. The majority of lots feature sizeable front setbacks, fencing and singular access points.

Surrounding bushland and green space are currently zoned for public conservation and resource zoning, as well as public park zoning, with the exception of a small area directly south of the industrial precinct which is zoned for low density residential uses. Much of the land is also subject to a Bushfire Management Overlay and classified as a 1:100 ARI area.

Figure 20: Robinvale Industrial 1 Zoned Land



Source: CKC

Robinvale Industrial Land Supply 2025

The 2024 land audit of Robinvale's industrial land identified:

- ✦ 18.5 hectares of Robinvale's industrial land is currently occupied by industrial or commercial uses across 38 lots.
- ✦ 48.3 hectares of land is undeveloped at 2025, across 5 sites. Included within these sites are:
 - Partially developed sites that are actively used, with significant portions of land undeveloped.
 - Two properties are entirely undeveloped with varying levels of constraint.
- ✦ 4.6 hectares of land is currently occupied by a vacant building, located at the northern end of Moore Street.

Table 11: Industrial land audit summary

Status	Swan Hill	Robinvale	Total
Occupied	88.6ha	18.5ha	107.1ha
Vacant	31.4ha	48.3ha	79.7ha
Non-Industrial	40.5ha	-	40.5ha
Vacant Building	-	4.6ha	4.6ha
Total	160.4ha	71.5ha	232 ha

Table 12: Robinvale Lot Size Analysis

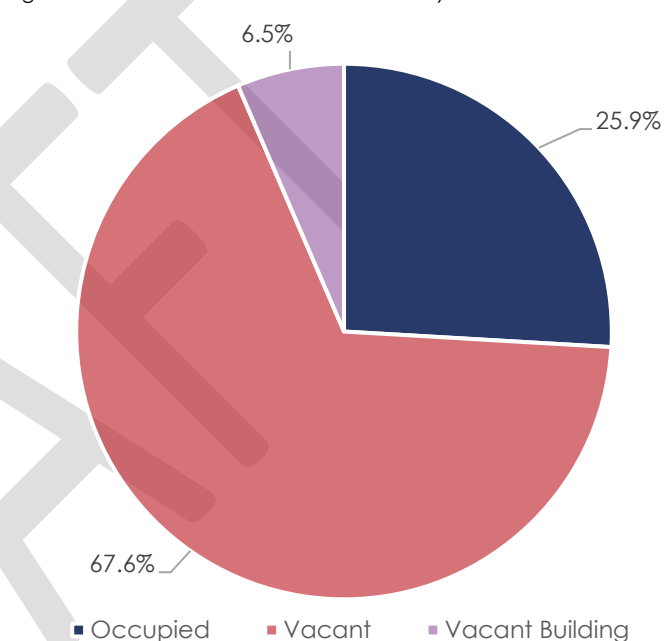
Status	Median Size (sqm)	Mean Size (sqm)	Lots
Occupied	3,300	4,900	38
Vacant Land	38,000	96,700	6
Vacant Building	46,300	46,300	1
Total	3,500	16,250	45

Figure 22: Robinvale Industrial Land Use



Source: CKC

Figure 21: Robinvale Industrial Land Use Analysis



Source: CKC

Vacant and Constrained Land in Robinvale

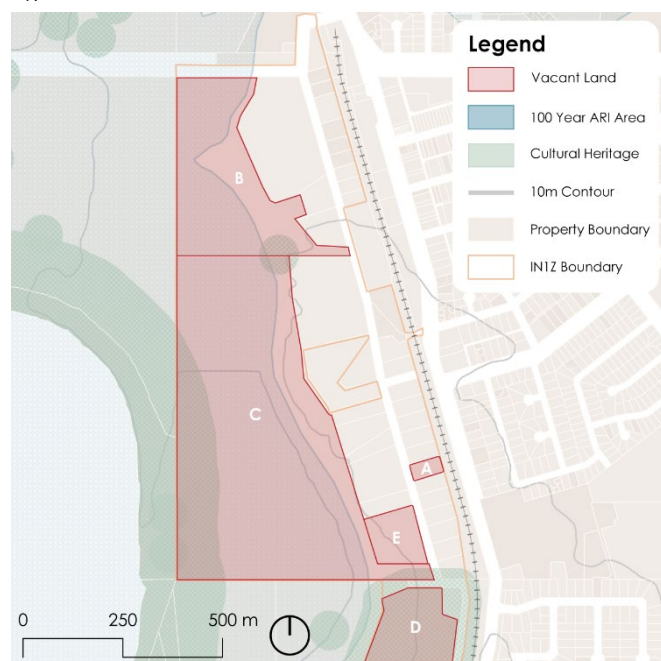
The 2024 audit identified 48.3 hectares of potentially vacant land. However, when considered in relation to potential development constraints there is far less theoretical supply of industrial land than identified in the audit.

The following examines potential development constraints and the impact on future supply in Robinvale. Specifically, five lots identified as A-E have been evaluated in relation to environmental and planning constraints.

Table 13: Development suitability assessment of undeveloped IN1Z land in Robinvale

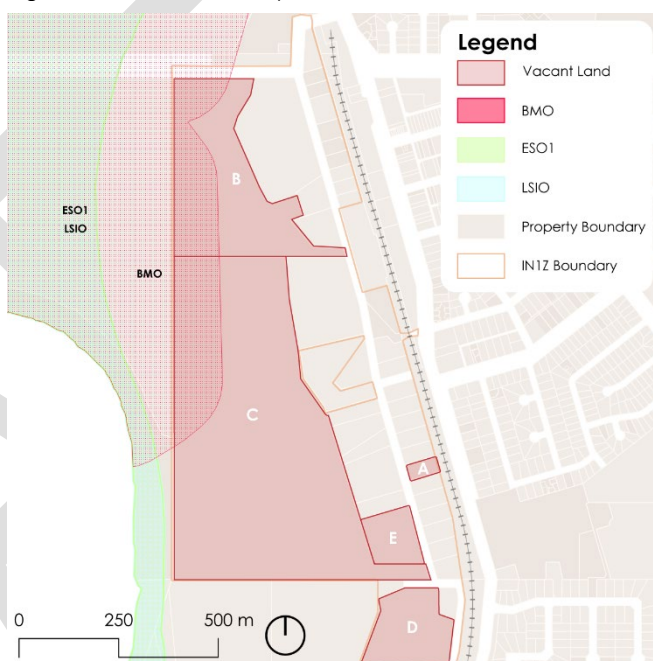
Site	Area (Ha)	Constraint Level	Frontage	Access	Topography	Native Vegetation	Subdivision Required	Potential
A	0.32	Low	Good	Good	Good	No	No	High
B	10.7	High	Poor	Fair	Poor	Yes	Yes	Low
C	31.8	High	Poor	Poor	Poor	Yes	Yes	Low
D	3.8	Medium	Good	Good	Poor	Yes	Yes	Medium
E	1.7	High	Good	Good	Good	Somewhat	No	Low

Figure 24: Robinvale Environmental Constraints



Source: CKC

Figure 23: Robinvale Overlays



Source: CKC

Robinvale Industrial Precinct is Constrained

Of the five potentially vacant lots four were found to be constrained to varying degrees.

Lots B and C are considered highly constrained due to their coverage under the 100 year ARI area, undulating topography, areas of cultural heritage sensitivity and bushfire risks. Lot D is moderately constrained as it includes an area of cultural heritage sensitivity and because of its sloping topography. Lot E is considered to be highly constrained. Lot A is the only lot to be classified as entirely vacant and unconstrained.

Accounting for all constrained vacant land, Robinvale's industrial precinct incorporates approximately 0.32 hectares of potentially developable vacant land. Whilst lots B – D could potentially be developed; constraints are likely to result in a range of costs that will limit the feasibility of future development.

As noted by the *Commercial and Industrial Zones Review (2018)*, development of available land to the west of Moore Street would require the consideration of the following factors:

- Development of these sites will require the subdivision of existing properties and therefore are subject to the intent of the land owners to do so.
- The majority of the land is located behind existing development and does not have frontage to an existing road, resulting in relatively poor site exposure.
- Upgrade and/or extension of road infrastructure would be required to service these areas.
- The potential to augment water, electricity and sewer services to these sites have not been considered
- Further technical assessments will be required to confirm flood and native vegetation impacts
- Cultural heritage sensitivity management plans and assessments are likely to be required across most lots
- The eventual development plan for individual sites may increase the developable land area due to design responses and mitigation measures incorporated in development outcomes (such as flood mitigation)

Assessing Robinvale's vacant land against the development constraints included in our assessment found that there are 6 lots (A-E) containing vacant land in the industrial precinct, of which 5 are subject to potential environmental and regulatory development constraints.

Figure 21 and 22 highlight the various environmental and regulatory constraints present throughout Robinvale's industrial precinct. Constraints impacting the area are as follows:

- Bushfire Management Overlay
- 100 Year ARI Area
- Cultural Heritage Sensitivity Areas
- Topography
- Access
- Size

Figure 25: Robinvale Industrial Precinct Vacant Land



Source: CKC

Industrial uses in Robinvale's farming zones

Robinvale's industrial area has seen minimal development over the past 20 years. A review of aerial photography suggests that there has been limited development throughout the precinct since 2000. This, however, is not indicative of a lack of industrial businesses or development within Robinvale. There is extensive evidence of contemporary industrial development throughout Robinvale's farming zones. Judging by the scale and quality of industrial facilities throughout Robinvale's irrigation areas, Robinvale is the municipality's leading logistics and packing area.

Development has occurred on farm land in direct proximity to horticultural uses, primarily grape growing. The growing and harvesting of grapes must be completed in a timely manner, requiring grapes to be stored in a 'pre-cooling room' at 4°C within 30 minutes after harvest. Following this, the grapes must be sorted and packaged within a maximum of 4 hours.

These requirements ensure the need for proximity between agricultural and industrial uses and thus have likely led to the current prevalence of industrial facilities within Robinvale's farming zones.

Figure 27: Street view of industrial use in farming area



Source: CKC

Figure 26: Industrial uses in farming zone



Source: CKC

Future Options: Robinvale Investigation Area

A future industrial expansion area has been identified.

Investigation Area 4 spans 17 hectares and currently sits within the airport's lot.

The area maintains some regulatory constraints, with Airport Environs, Bushfire Management and Design and Development 1 Overlays affecting the area. The DDO1 encompassing the area places height restrictions on development, with a permit required for any buildings over 7.5m in height. Height restrictions may constrain the diversity of potential industrial development.

Whilst somewhat constrained by regulatory conditions, IA4 features minimal sloping and remains a potential candidate for Robinvale's future industrial firms to locate within.

Figure 28: Robinvale Investigation Area



Source: CKC

Figure 29: Robinvale Investigation Area Streetview



Source: CKC

Industrial Land State of Play - Robinvale (Township)

Key Issues

Moore Street

- Vacant land is largely constrained due to environmental regulation and flood risk.
- Moore Street is the singular access point for most sites, limiting potential for development of land to the east.
- Undulating topography is likely to limit potential development to the east of Moore Street.

Wider Robinvale

- Industrial demand is focused within farming areas.
- Minimal industrial development in industrial areas over the past two decades.
- Robinvale is facing an accommodation and housing crisis, with land for housing a major priority.

Opportunities

- Potential for IA3 to be an expansion area to secure long-term industrial land supply.



We invite your views

- What do you see as the future of industry in Robinvale?
- Do you think IA3 is an appropriate area for expansion?
- Do you know of any other areas that are suited for industrial expansion?
- How can we attract demand to existent and future industrial land?
- How can we be more inclusive and supportive of the temporary key workers working in Robinvale?



2.4 Industrial zoned land across the municipality

Across the municipality, Swan Hill incorporates a total of 249 hectares of industrially zoned land. Overwhelmingly, this land is concentrated within Swan Hill and Robinvale (93%). There are small pockets of industrial land located in Lake Boga, Nyah and Woorinen South.

Swan Hill accounts for over 60% of the municipality's total industrial land, located across two distinct precincts. Karinie Street industrial estate, which encompasses 145.8 hectares of IN1Z land. Quin Drive industrial precinct, located at the intersection of Sea Lake – Swan Hill Road and Gray Street, accounts for the remaining 14.5 hectares of industrial land in Swan Hill. Both precincts are positioned along the fringe of the Swan Hill urban area and about a mixture of agricultural land, residential development and major transport corridors. Robinvale is Swan Hill's next largest industrial precinct. The precinct incorporates approximately 71.5 hectares of industrial and is located adjacent to the train line and town centre, with bushland to the west and commercial and residential development to the east.

It must be noted that, whilst not encompassed within the municipality, there is an industrial area adjacent to Swan Hill in New South Wales. Primarily located on Cygnet Lane, Murray Downs, the area encompasses a total of 13.3 hectares of industrial land. For further details, see appendix.

DRAFT

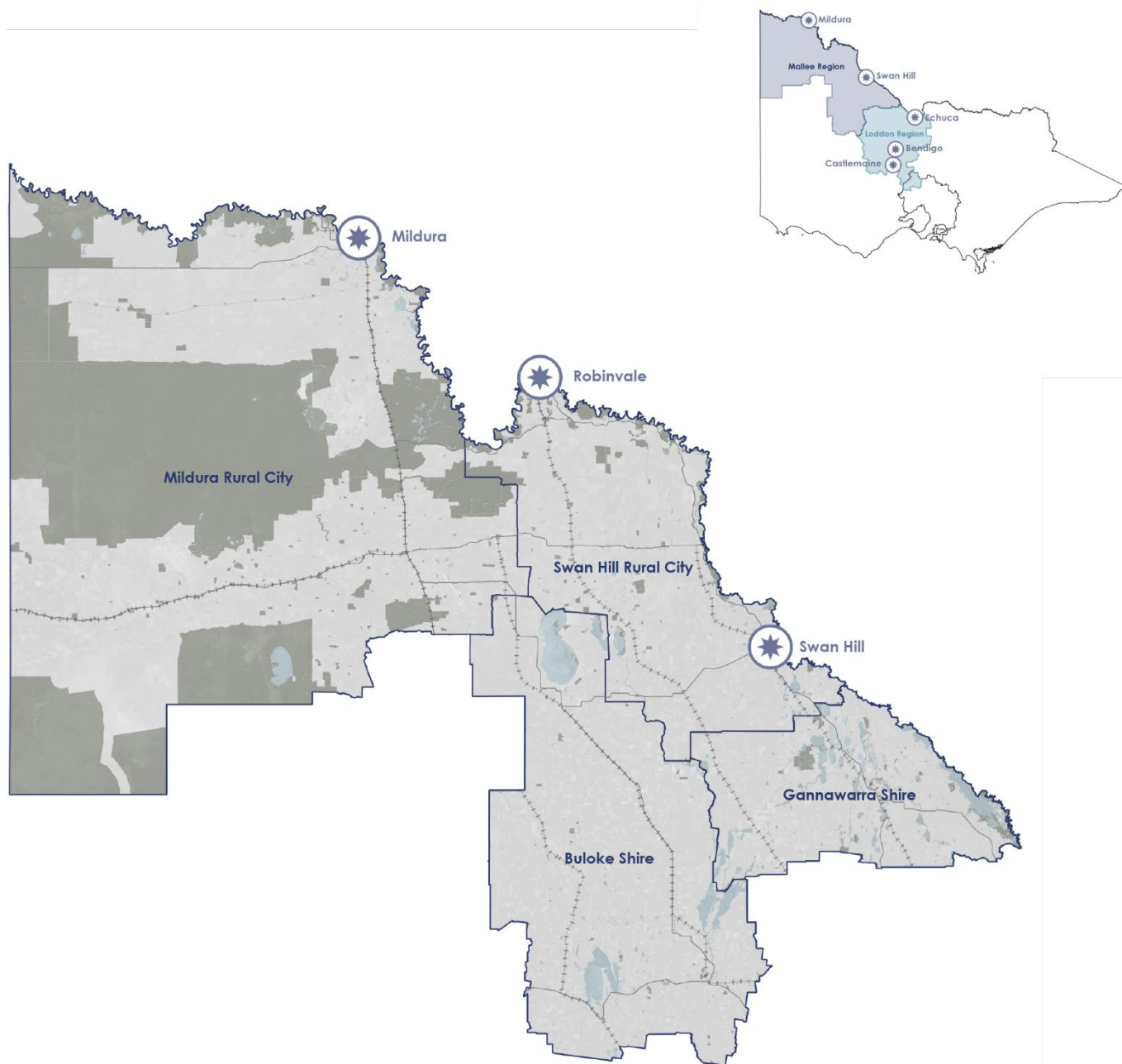
3.0 Industrial Outlook

Regional Economic Summary

The Loddon Mallee Region, encompassing 10 LGAs across the north west of Victoria, encompasses strengths in agriculture and food processing. The area contributes a fifth of the State's agricultural output.

The Loddon Mallee's economy is diversifying with growth in tourism, renewable energy, healthcare and manufacturing. Key destinations across the region include Castlemaine, Bendigo, Echuca, Swan Hill and Mildura. The north of the Mallee has seen significant investment in renewable energy production due to its high solar exposure, as well as mineral sands production.

Figure 30: Loddon Mallee Region Context Map



Source: CKC

Swan Hill – A Production Community

Swan Hill's community and economy are a critical part of Victoria's food economy. The municipality is a major producer of table grapes, stone fruits, citrus, grains, almonds and vegetables, with a significant dairy and livestock sector also supporting the wider agricultural sector's economic output. The region maintains a strong visitor economy through its food and wine production, as well as the recreational and leisure opportunities afforded by the Murray River.

Swan Hill's strengths in agri-food industries have spurred industrial demand throughout the municipality, with a high proportion of businesses in its industrial areas providing supporting goods and services including packaging, processing, storage, machinery and transportation.

Economic Outlook

Positive Influences

Looking towards the future, Swan Hill's agricultural economy and growing mining and energy sectors will continue to propel the municipality. Ongoing agricultural, mining and household growth will continue to spur the industrial sector which will support a range of processing, material input, service and machinery needs.

At 2021, the municipality supported approximately 9,800 local jobs, with its economic strengths reflected in the distribution of workers. Agriculture, forestry and fishing is the leading employment sector, whilst jobs associated with industrial land (manufacturing, transport, postal & warehousing, construction) comprise approximately 20% of all current jobs.

Swan Hill has also seen growth in its overall workforce, expanding by a total of 1,300 new jobs at an average annual growth rate of 2.9% per annum since 2016.

Constraining Influences

Swan Hill has seen a lowering unemployment rate and growing business activity which has led to businesses struggling to attract suitable, skilled employees.

The municipality's workforce participation rate of 58.8% is relatively low compared to the rest of Victoria (62.4%), which is reflective of the municipality's high proportions of older residents.

Table 14: Swan Hill (LGA) distribution of workforce across age groups

Life Stage	Swan Hill	Regional VIC	+/- %
Youth and Tertiary (15-24)	14.6%	15.0%	-0.4%
Young Professional (25-34)	22.9%	19.7%	3.1%
Workers (35 – 49)	28.3%	29.6%	-1.4%
Older Workers (50-64)	27.3%	28.8%	-1.5%
Retirement (65-79)	6.5%	6.4%	0.1%
Elderly (80+)	0.5%	0.3%	0.2%

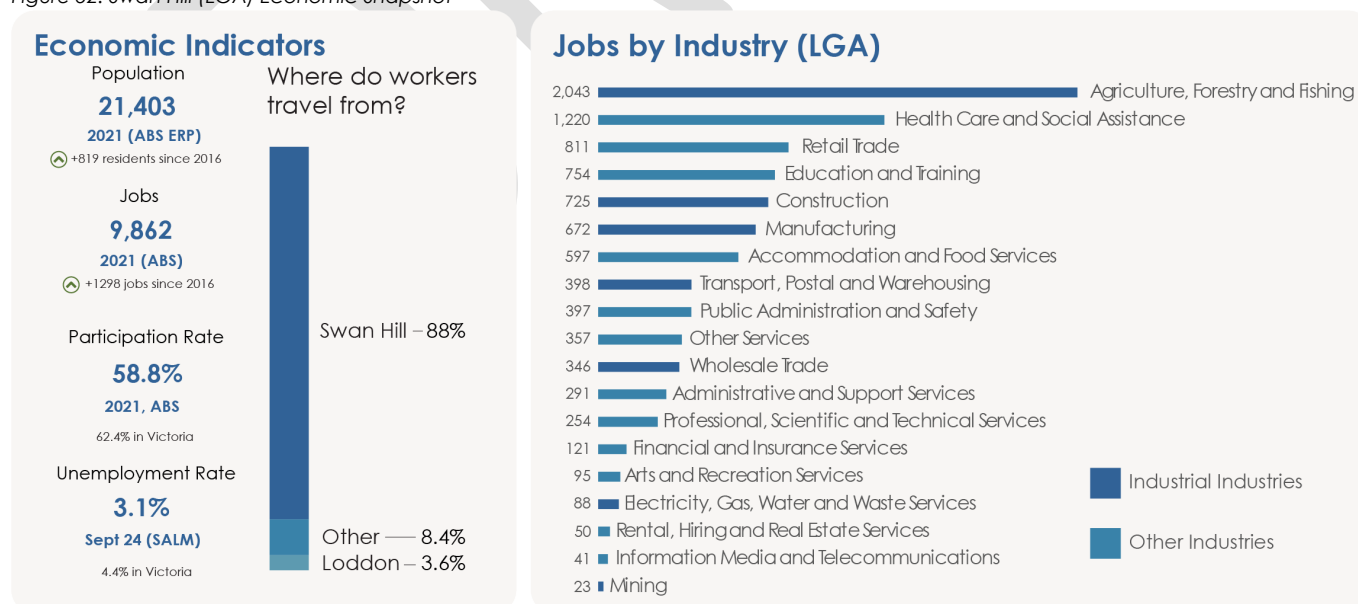
Source: ABS, CKC

Figure 31: Swan Hill Unemployment Rate 2010 - 2024



Source: CKC, SALM

Figure 32: Swan Hill (LGA) Economic Snapshot



Source: ABS, CKC, SALM

Export Oriented Production Community

Swan Hill's economy is strongly export-oriented and contributes greatly to Victoria's economic output. As of 2023, Swan Hill's economic output reached \$3.2B, representing over a 25% increase in annual output since 2016. At both a municipal and state level, exports represent a large proportion of this output, with exports accounting for 45% of Swan Hill's total economic output and 0.3% of Victoria's total exports.

Swan Hill's strength in agriculture accounts for a significant portion of the LGA's overall output, as well as Victoria's agricultural output. The municipality's agricultural sector contributes close to 5% of Victoria's overall agricultural output and 6% of its agricultural exports, particularly its international exports.

Victoria's reliance on Swan Hill for agricultural production has driven demand for industrial land as both agricultural businesses and supporting sectors grow and concentrate in the region.

Goschen Mineral Sands and Rare Earths Project

Swan Hill's export-oriented economy is set to grow further with the establishment of the Goschen Project. Located 35km south of the Swan Hill township, the site encompasses 1,500 hectares of land with a deposit of approximately 629 million tonnes of ore. Extracted minerals will be transported from Ultima to the Port of Melbourne for overseas export.

The project is expected to run for 20-25 years, with VHM overseeing its operations. Over this period, the project is anticipated to add over \$2 billion to the Loddon-Mallee economy and a further \$1.3 billion to the Victorian economy.

It is estimated that the project will create at least 325 direct full-time jobs during site establishment and construction, and a further 400 full-time jobs during operation. It must be noted however that the project is expected to draw a significant proportion of its employment from Swan Hill's established workforce which may impact on the other parts of the region's industrial economy. It is likely that demand for supporting uses and subsequently industrial zoned land will increase as a result of the project.

Business Numbers

The growth and strength of industrial sectors that support the agricultural industry is reflected in the number of these businesses across the municipality. 268 businesses in Swan Hill are in manufacturing, transport and waste services, representing 10% of the municipality's total businesses.

Employment in Swan Hill (Locality)⁴

The locality of Swan Hill is the epicentre for the region's economy and employment, with close to 6,000 workers or just over 60% of its employment base working in Swan Hill.

The city's workforce has grown considerably since 2016, with 630 net new jobs established over the 5 year period to 2021, with greatest growth in health care, construction and education.

Similarly to the number of businesses, manufacturing, transport and waste services employ close to 700 people in Swan Hill, accounting for 12% of its total employment base.

Figure 33: Swan Hill (LGA) Economic Output

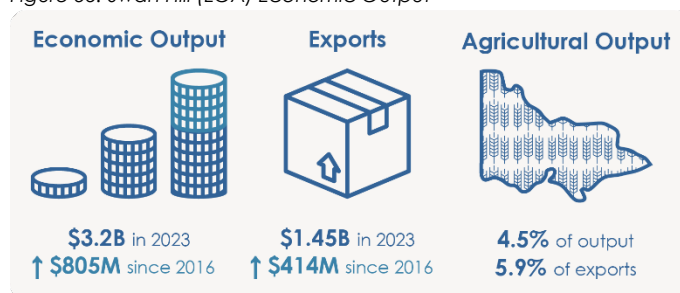


Figure 34: Swan Hill (LGA) Location Quotient

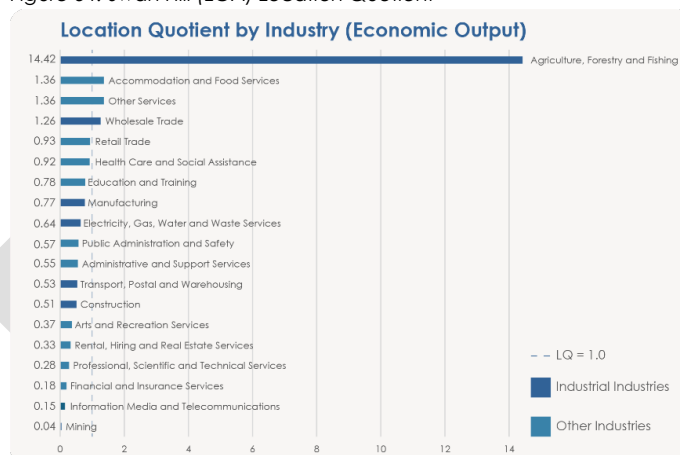


Figure 36: Swan Hill (LGA) percentage of industrial businesses

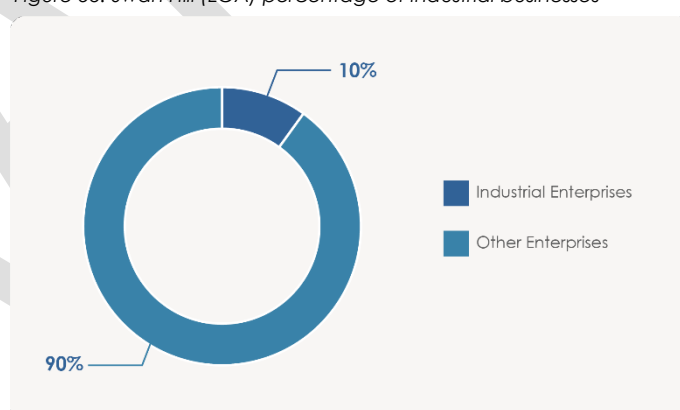
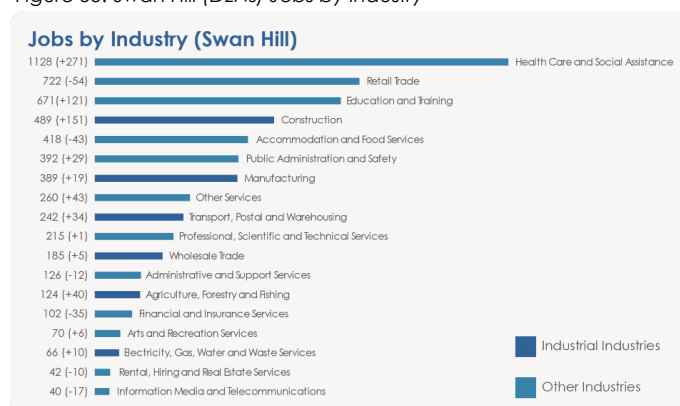


Figure 35: Swan Hill (DZNs) Jobs by Industry



Source: ABS, CKC, id.

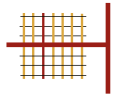
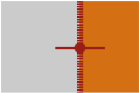
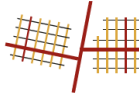
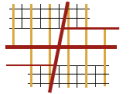
⁴ See appendix for jobs by industry data for Robinvale

4.0 Appendix

Classifying the New Industrial Economy

The incorporation of services in traditional productive areas fosters new connections between communities and nearby industrial space. Hatuka & Ben Joseph's (2022) *New Industrial Economy Framework* provides a helpful structure for thinking about the growth of services and the corresponding impact on the use of industrial space.

Areas of production and living interact differently largely depending on the role and use of industrial space. The *New Industrial Economy Framework* categorises the relationship of productive land to social space according to their level of interaction and integration as follows:

Type	Structure	Land Use
Autonomous  This type is characterized by large-scale zones occupied by uniform industrial buildings and surrounded by various physical boundaries.	Unified 	Zoning 
Adjacent  The organizational outline of the adjacent type is based on zoning and the separation between living and working.	Parallel 	Partial zoning 
Integrated  The key feature of this type is symbiosis between living and working.	Layered 	Mixed 

Integrated – enclaves of industrial land in which there is a close association between community and industry – Harnett Drive in Seaford exemplifies industrial integration the area supports service, finance and hospitality functions for the community.

Adjacent - This is a common form of industrial spatial organisation exemplified by locations in Spotswood and Altona where community and industry coincide in close proximity, but function very separately.

Autonomous - This is exemplified by land in Victoria's Industrial 2 Zone. In autonomous locations productive space is deliberately isolated and alienated from social space, for the purpose of protecting the amenity and safety of living areas and guaranteeing ongoing productive practices.

Re-integrating Home and Work (Are We Returning to the Past?)

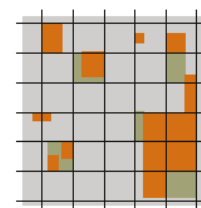
Historically, the space of production and living were closely associated. Following suburbanisation, mass private vehicle take-up, and associated land use regulation that separated private and public space, the relationship between productive space and living space weakened.

Technology, workplace-flexibility and land use flexibility would seem to be re-integrating home and work, as per past communities, albeit that work for many of us is far less physical than in the past.

The 4th industrial revolution marks a shift toward a potential new industrial urbanism which sees urban manufacturing take on cleaner, quieter processes, with smaller footprints for businesses and thereby greater possibilities to foster integrated living and working spaces.

4th Industrial Revolution

Innovation | Digitization, IOT, cyber systems



Karinie Street Industrial Estate – Business Profiles:

The following section details examples of firms located within the precinct:

Proform Solutions:

Proform Solutions is a plastic resin manufacturer producing mould designs and polyethylene powders. Their site is located on Williams Road and have been operating for over 20 years in Swan Hill. Proform Solutions' site is one of Karinie Street industrial estate's larger lots at 13,000 sqm with modern industrial built form.

Figure 37: Proform Solutions



Site	Lot Size (sqm)	Business Type
Proform Solutions	13,000	Manufacturer

North West Agricultural Services:

North West Agricultural Services, established in 1987, has become a major competitor in the agricultural supplies industry throughout the North West of Victoria, with sites throughout the region. Their Swan Hill site is reflective of many sites within the North precinct at 3,300 sqm.

Figure 38: North West Agricultural Services



Site	Lot Size (sqm)	Business Type
North West Agricultural Services	3,300	Agricultural Services and Wholesaling

Quin Drive Industrial Estate - Business Profiles:

The following section details examples of firms located within the precinct:

Cleanaway:

Cleanaway is a multinational waste management company with sites across Australia. Cleanaway Swan Hill services areas from Balranald in far North West NSW to Boort in Victoria. This includes Swan Hill, Nyah, Balranald, Tooleybuc, Kyalite, Barham, Moulamein, Lake Boga, Kerang, Dumosa, Sea Lake, Wycheproof, Boort. The site is situated on Quin Drive and totals 2,500 sqm.

Site	Lot Size (sqm)	Business Type
Cleanaway	2,500	Waste Management



Mawsons:

Operating since 1912, Mawsons is a major concrete manufacturer that has grown to service north west Victoria and parts of southern New South Wales and South Australia. Their site in Swan Hill covers 4,500sqm and is one of 40 concrete plants owned and operated by the company.

Site	Lot Size (sqm)	Business Type
Mawsons	4,500	Concrete Manufacturer



Robinvale - Business Profiles

The following section details examples of firms located within the precinct:

Haeuslers:

Operating for over 60 years, Haeuslers services the agricultural industry in the north-west Victoria and southern New South Wales. Haeuslers is a dealer of farming machinery including tractors, mowers and fertiliser spreaders. The sites at the northern tip of the industrial precinct and covers 4,000 sqm.

Figure 39: Haeuslers Profile

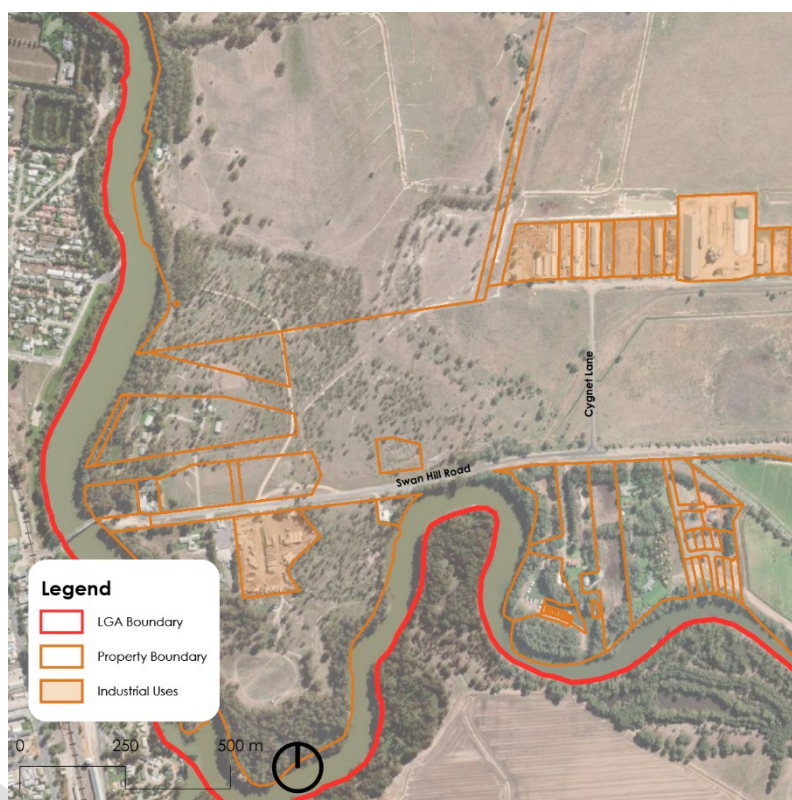
Site	Lot Size (sqm)	Business Type
Haeuslers	4,000	Farming Machinery Dealer



Industrial uses across the border

Table 15: New South Wales Industrial Land

New South Wales Industrial Land	Area (ha)
Cygnets Lane	10.4
Occupied	8.8
Vacant	1.6
Swan Hill Road	2.9
Total	13.3



Source: CKC

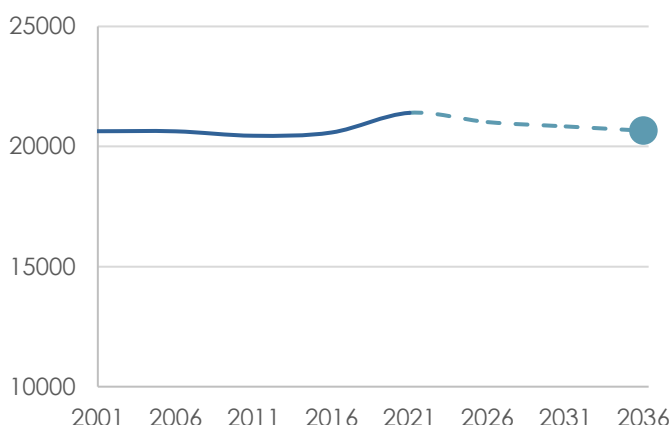
A productive community

Swan Hill's population has grown substantially since 2016, with an influx of residents during the height of the COVID-19 Pandemic. In 2021, our community included 21,403 residents. This influx was proportionately young as well, with the median age dropping from 40 to 39 between 2016 and 2021. Relative to Regional Victoria, Swan Hill's population is younger, with Regional Victoria's median age at 43. Since 2001, we have welcomed an average of 38 new residents every year. In the future, our population is expected to incrementally decline. Population forecasts conducted by Victoria in Future suggest Swan Hill is expected to decline by 750 residents by 2036, at an average of 50 residents every year. However, as noted by the Robinvale Population Determination Briefing Paper (2019), there are discrepancies between Robinvale's Estimated Resident Population and what bank transaction and water usage data would suggest is the actual resident population is. Discrepancies in population data may be present throughout Swan Hill and thus suggest the accuracy of forecasted population changes may be limited.

Swan Hill's community is also one that services a wide catchment and is responsible for a large proportion of the region's exported goods. This catchment and export-oriented economy is a significant driver of demand for industrial land.

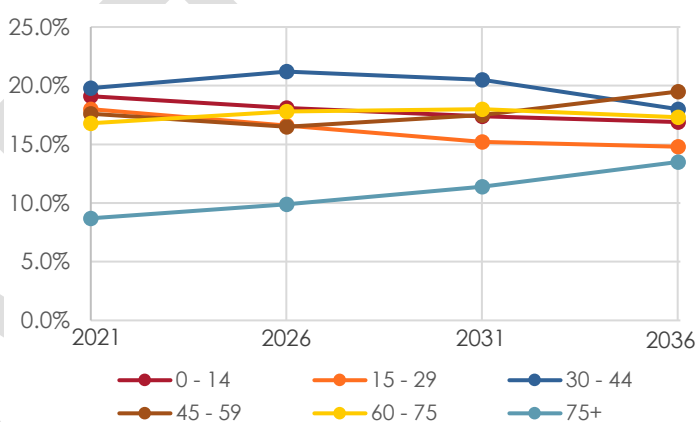
Over the next 15 years, the municipality's cohort of residents over 60 years of age is expected to increase to over 30% from 25%, whilst the proportion of residents aged 0-29 will drop to 32% from 37%. This has significant implications for our future labour pool which already includes significant numbers of older workers and will place greater pressure on our health care and social services sectors. Attracting younger migrants to Swan Hill through increased employment opportunities will be critical in future proofing the economic vitality of our region and our capacity to service the needs of our community.

Figure 40: Swan Hill Population Historical and Projected



Source: ABS, CKC, VIF

Figure 41: Projected population change by age group 2021 - 2036



Source: CKC, VIF

Table 16: Mallee Region LGAs & Loddon Shire population change

Municipality	Population 2016	Population 2021	Growth Rate	Median Age (2021)	Population 2036	Projected Growth Rate
Swan Hill	20,584	21,403	1.0%	39	20,657	-0.2%
Mildura	53,878	56,972	1.1%	40	62,986	0.7%
Gannawarra	10,549	10,683	0.3%	51	10,178	-0.3%
Buloke	6,201	6,178	-0.1%	52	5,720	-0.5%
Loddon Shire	7,569	7,748	0.5%	52	7,889	0.1%
Total	98,781	102,982	0.5%		107,430	0.3%

Source: ABS,CKC

Jobs by Industry – Swan Hill and Robinvale (DZNs)

Figure 42: Jobs by Industry (Swan Hill North)

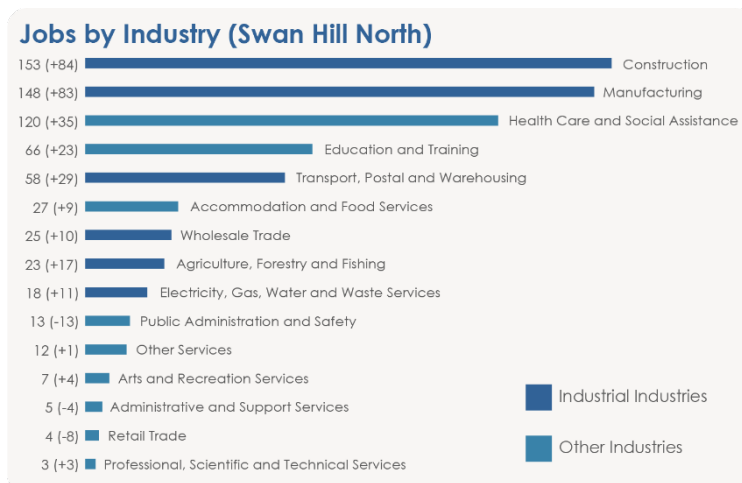


Figure 44: Jobs by Industry (Swan Hill South)

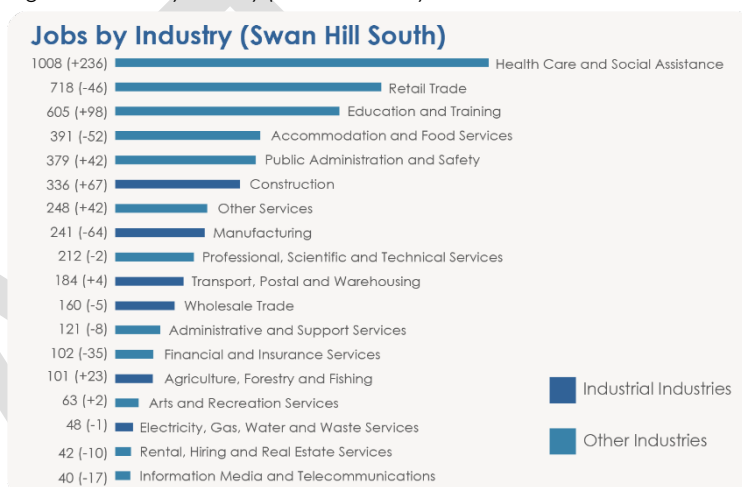
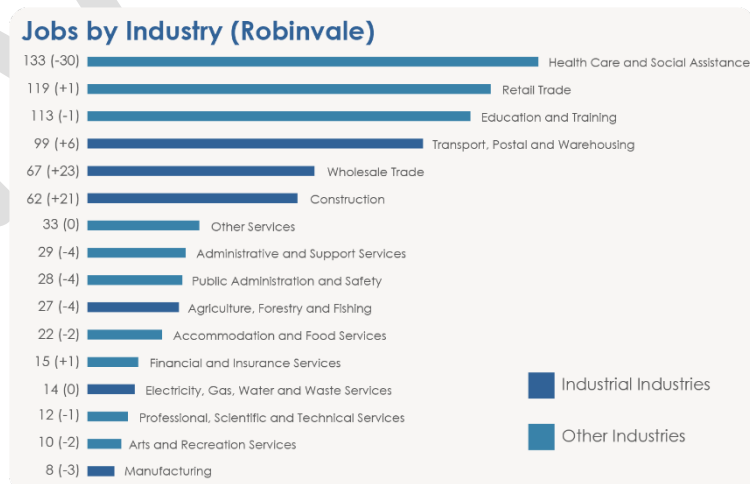


Figure 43: Jobs by Industry (Robinvale)



Source: ABS, CKC



Charter
Keck Cramer