SHIRE OF DANDARAGAN

INDUSTRIAL LAND NEEDS REVIEW 2025/2026

June 2026

SHIRE OF
DANDARAGAN

Contents

Executive Summary

The Shire of Dandaragan Industrial Land Needs Review (ILNR) assessed future industrial land demand and supply within the Shire of Dandaragan to 2036, including land quantity requirements, lot size demand, and the capacity of existing industrial areas to accommodate growth. The Industrial Land Needs Review (ILNR) provides an evidence base to guide land use planning, infrastructure provision, investment and funding proposals.

The following points summarise the key findings of the report.

- The Shire of Dandaragan requires approximately 32–42 hectares of additional serviced industrial land by 2036, equating to around 125–168 industrial lots. This represents an average delivery requirement of 3–4 hectares (12–16 lots) per annum.
- The review identifies a critical shortage of serviced industrial land, with approximately 96% of zoned and serviced industrial land already occupied, and only 1.5–2 hectares of vacant serviced land available across the Shire.
- Demand is primarily for small to medium-sized industrial lots, typically ranging between 1,000 m² and 5,000 m², with an average lot size of approximately 2,500 m².
- Evidence is emerging of demand for larger industrial lots to support freight, logistics and transport-related uses, with 28% of surveyed businesses seeking to expand to larger sites.
- The Shire has approximately 140 hectares of industrial-zoned land, with 41 hectares developed and occupied across 123 lots.
- Approximately 28 hectares of industrial-zoned land is considered accessible for short-term subdivision in the Coalseam Industrial area (north of the airport runway) to accommodate small medium sized lots. Coalseam offers the greatest capacity for expansion and is the only industrial area with a wastewater treatment system (delivered to the WWTP by tankering). However, expansion is constrained by limited water supply and wastewater infrastructure.
- The Seville Industrial Area (Cervantes) is significantly constrained by environmental values (TECs, ESAs) and is not suitable for expansion without further detailed investigations and potential amendments to the planning framework.
- The Carmella Industrial Area has no remaining capacity for expansion and requires protection from incompatible surrounding land uses.
- The Jurien Bay Boat Harbour presents a longer-term opportunity for approximately 11.5 ha of marine-related industrial development, subject to environmental, coastal, bushfire and servicing constraints and further structure planning.
- To address demand for large-format industrial lots, the report recommends planning for an Industrial Area (capable of serving a subregional function) to accommodate large lot configuration supporting freight, logistics, and emerging State priorities for industrial diversification**.** The first stages to include 18–20 hectares of suitably located

land with direct access to RAV 7 freight routes, preferably near Brand Highway, to provide a minimum of 20 larger lots (averaging approximately 7,000 m^2- 1ha).

- The ILNR recognises that the Shire is strategically positioned to accommodate an Industrial Area of sub-regional significance, capable of supporting emerging industries contributing to the State Government's transition to renewable energy and facilitating growing freight and logistics activity.
- The ILNR sets out a coordinated program of actions focused on land activation, infrastructure staging, environmental investigations, planning framework updates and funding advocacy, including pursuing Regional Development Assistance Program (RDAP) funding.
- The priority focus is to advocate for improved access to water and wastewater in collaboration with the Water Corporation and Development WA to enable immediate and short-term industrial land supply, and plan for ongoing investment to keep pace with demand in the long term.

1.0 Introduction and Context

1.1 Background

Industrial land plays a critical role in the Wheatbelt's regional economy, supporting sectors such as agriculture, logistics, resources and emerging energy projects. This investment places increasing pressure on industrial land availability, particularly general and light industrial sites that accommodate service industries, fabrication, equipment storage, transport operations and contractors. Ensuring an adequate and well-located supply of industrial land is essential for enabling efficient project delivery, attracting private investment, and supporting local employment across the broader Wheatbelt economy.

Within the Shire of Dandaragan, industrial land demand is shaped by its strategic location, the presence of key resource and agricultural industries, and the ongoing development pipeline across energy and mining projects. The Shire has been the focus of major wind farm and mineral sands initiatives demonstrating sustained industry confidence in the area's capacity for growth. Land supply assessments indicate that while the Shire of Dandaragan has identified areas of land zoned for industrial use, access to the land is constrained due to limited wastewater and water services, and environmental values.

Ongoing monitoring and planning are required to ensure land supply aligns with rising demand driven by population, employment and project activity across the region. As the Shire continues to evolve as a hub for energy, mining, agriculture and supporting industries, infrastructure provision and strategic industrial land planning is critical to enabling future economic development and diversifying the local economy.

1.2 Purpose of the Industrial Land Needs Review

The purpose the Industrial Land Needs Review (ILNR) for the Shire of Dandaragan is to present a review of the key drivers for emerging industries and their impact on the sub-regional and local industrial development markets, as well as the potential medium to long-term land use planning implications for the Shire. The ILNR has been prepared to provide an evidence base to support future funding proposals and inform future updates to the Local Planning Framework.

Specifically, the Shire of Dandaragan ILNR seeks to:

- Present the current supply, distribution, and utilisation of industrial land and associated uses across the Shire, including the types of industries currently operating.
- Identify infrastructure, environmental and planning constraints to land development. This includes (but is not limited to) SW Native Title Settlement, Crown Land, Priority Water Resource Areas, Environmentally Sensitive Areas, Transport and access, and capacity of Power, Water, Sewer and Connectivity.
- Assess the level and nature of demand for industrial land.

- Present evidence to support funding applications under the Regional Development Assistance Program (RDAP) for short- to medium-term projects.
- Identify actions to facilitate the activation of industrial land and increase the supply of project-ready sites.
- Provide recommendations to update the Local Planning Framework.

1.2 Methodology

The ILNR has been undertaken by the Shire of Dandaragan Development Services Strategic Planning team. The review draws on currently available Shire and State datasets to assess existing industrial land availability across the Shire, including zoning, servicing capacity and land use constraints.

Stakeholder engagement has been undertaken to understand the needs and future requirements of local industries and businesses, including consultation with key industry stakeholders including Development WA, the Wheatbelt Development Commission (WDC), and the Department of Planning Lands and Heritage (DPLH). The process has also been informed by targeted engagement with relevant internal Shire service areas and infrastructure agencies (Water Corporation, Western Power, Department of Health and Main Roads WA) to understand development readiness and constraints. To complement this work, specialist economic consultants have been engaged to undertake an industrial development market analysis to inform demand forecasting and support evidence-based recommendations.

The following table outlines the components that inform the study outcomes.

FIGURE 1: ILNR METHODOLOGY

Stakeholder Engagement	Market Analysis and Demand Forecasting	Industrial Land Audit	Industrial Land Needs Review Recommendations
• Targeted engagement with key stakeholders to inform industrial land needs. Including a survey with businesses and landowners, informing assumptions and validating findings across the review.	• Specialist economic analysis to assess current and future demand for industrial land. This included analysis of population growth, economic drivers and emerging industry sectors, and forecast demand for industrial land by type, size and location at both local and sub-regional scales.	• Shire-wide audit of industrial-zoned land to assess land supply, development readiness and servicing capacity. Existing industrial land was reviewed to identify availability, utilisation, infrastructure provision and key constraints affecting development.	• Prioritized recommendations for activating industrial land supply, identifying opportunities for future industrial development, supporting funding applications and guiding subsequent planning and implementation actions.

1.3 Strategic Alignment

A summary of the literature reviewed in **Appendix A** indicates that the Shire of Dandaragan is well positioned to meet future demand for Industry within the Wheatbelt. The documents reviewed include:

- Draft Shire of Dandaragan Growth Plan 2025
- Shire of Dandaragan Growth Plan 2012
- Shire of Dandaragan Local Planning Strategy 2020
- Strategic Industrial Lands Activation Plan 2025
- Economic and Employment Lands Strategy (EELS) 2012
- 10 Year industrial Lands Strategy 2021 (Development WA)
- 2026 Integrated System Plan (ISP)

This review highlights that the Shire of Dandaragan benefits from a range of existing industrial precincts including Coalseam Road, Carmella, Seville, Badgingarra and Dandaragan. These precincts offer the land capacity and strategic access required to support logistics, construction services, warehousing, marine industries and rural enterprise activity. Coordinated planning, servicing and activation of these areas will be critical to strengthening the Shire's role as a regional industrial centre that can support local businesses and broader Wheatbelt economic activity.

The *10 Year Industrial Land Strategy June 2021* (Development WA) defines types of industrial land which includes 'General Industrial Areas (GIA's)' as evident in the Shire, and 'Strategic Industrial Areas (SIA's)' which are not currently provided the Wheatbelt. Figure 2 below outlines the typologies and location criteria associated with both GIAs and SIAs.

FIGURE 2: INDUSTRIAL TYPOLOGIES

Table 1: Industrial Land Types

INDUSTRIAL TYPOLOGIES AND LOCATION CRITERIA		
INDUSTRY TYPOLOGY	**ACTIVITY**	**LOCATION CRITERIA**
1. STRATEGIC INDUSTRIAL AREAS	• Industrial activities of significant economic and strategic importance to the State • Strategic, value-adding activities such as downstream resource processing that represent new segments of key industrial value chains. • Industries likely to have off-site impacts such as major hazard risk, light, noise, odour or emissions • These industries generate significant investment and employment	• Large land areas required • On major transmission (electricity and gas) infrastructure networks • Road access by heavy vehicles • Direct port connection – via road or rail • Close to major population centre to source employees and ancillary general industrial needs • Sufficient separation distances between sensitive uses, such as residential, and industry through an established buffer
2. GENERAL INDUSTRIAL – DISTRICT ESTATES AND SPECIAL USE SITES OF LOCAL SIGNIFICANCE. ESTATES WITH SMALL TO MODERATE SIZED INDUSTRIES.	• Consumer and business orientation • Provide goods and services to regional, state and international markets • Not hazardous or offensive • Can include business parks, offices, local services, fabrication and manufacturing • Limited bulky goods showroom	• Access to key freight routes, including Over Size over Mass network as well as the freight rail network • Potable and processing water, sewer/land for waste water disposal, electricity, other energy (food and metal processing are heavy water users and may require associated recycling facilities) • Large, skilled workforce catchment • Moderate to large, relatively flat sites – any processing is land intensive • Potential for large amounts of onsite storage

The review highlights potential for the Shire to support higher-order industrial activity due to its locational advantages (The Southwest Interconnected System (SWIS), the Dampier–Bunbury Natural Gas Pipeline, and major road networks) and due to its role in supporting Western Australia as it transitions toward renewable energy systems. The Shire of Dandaragan has the potential to respond to emerging State priorities for industrial diversification, energy security and regional growth. While the Shire of Dandaragan and forecast activities are not positioned to reflect the requirements for an SIA there is potential to identify an Industrial area that serves a subregional role.

2.0 Industrial Land Demand

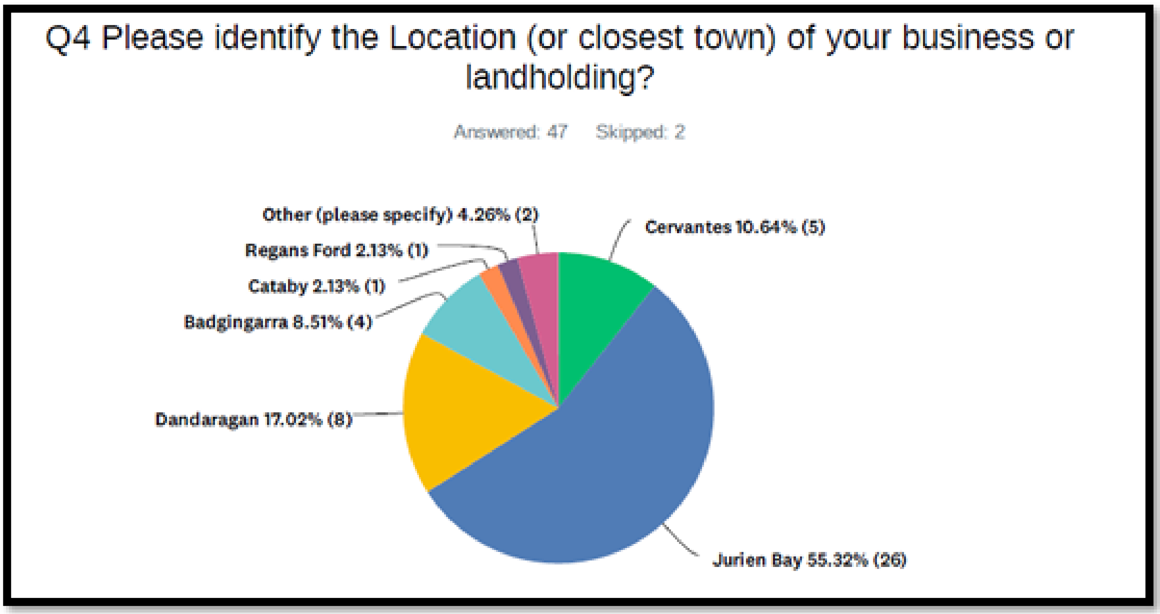
2.1 Shire of Dandaragan Industry Business Survey

The Shire of Dandaragan conducted a survey with industry businesses, landowners, and state government agencies (during September–November 2025) to assess current and future industrial land requirements (See **Appendix B: Industry Business Survey Outcomes**). The survey received 49 responses, representing approximately 30% of industry groups and associated businesses in the subregion.

The key outcomes of the survey included the following:

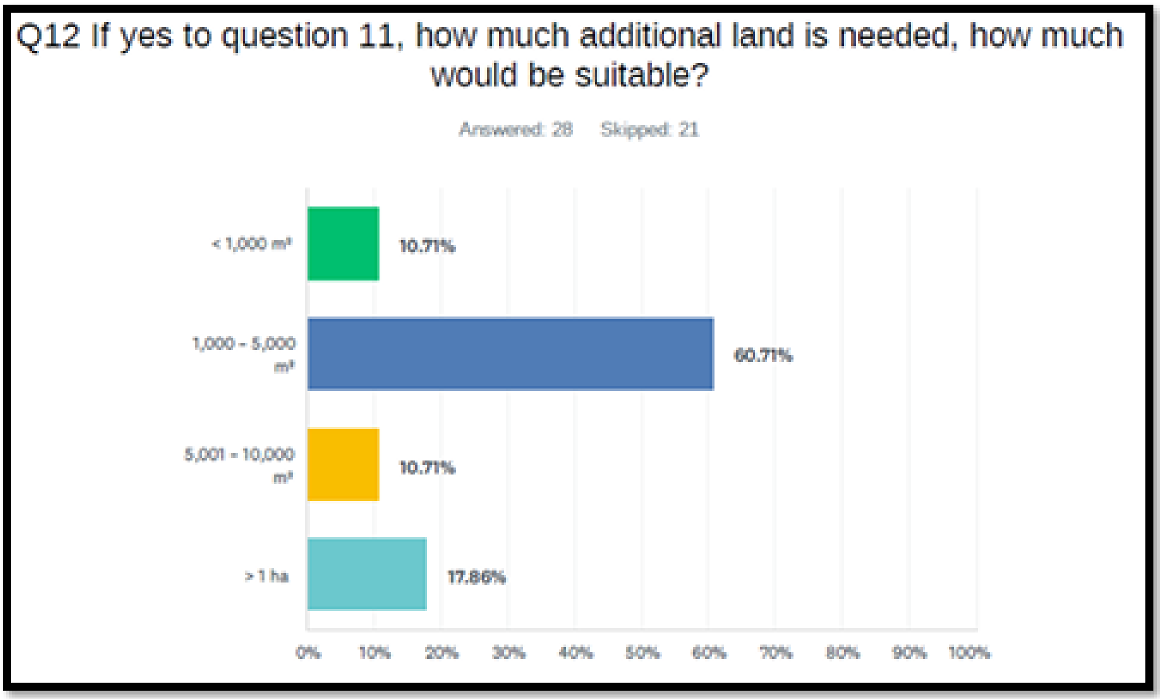
- The majority of respondents were business owners/managers (82%), primarily operating in Agriculture, Forestry & Fishing, Construction, Transport/Warehousing sectors, Retail Trade, Mining, Manufacturing and infrastructure services. Most responding business are long-established (10+ years), small to medium-sized, and concentrated around Jurien Bay.

FIGURE 3: LOCATION OF SURVEY RESPONDENTS



- Forty six percent of responding businesses plan to expand within 5–10 years, with significant demand for sites between 1,000–10,000m^2, particularly from agriculture, construction, and mining sectors. The majority of business have demand for lots between 1,000-5,000m^2. Twenty eight percent of responding businesses have an interest in securing larger lots (5,000 – 10,000m^2 and greater than 1ha).

FIGURE 4: LAND DEMAND AND SIZE



- Businesses rate the Shire as moderately competitive (3.56/5) and well-connected to markets (3.52/5). Economic resilience scored positively (3.47), but infrastructure (2.96) and internet connectivity (2.65) were identified as weaknesses.
- Jurien Bay is the preferred location for future industrial development, followed by Badgingarra and Dandaragan.
- Major challenges for growth were identified to include employee housing shortages, limited industrial land availability, inadequate infrastructure (power, water, sewer), and poor telecommunications.
- Tourism, renewable energy, agricultural innovation, and population growth were cited as potential drivers for growth, contingent on infrastructure and housing investment.
- Affordable and serviced industrial land, improved housing, infrastructure upgrades, and incentives are critical for competitiveness and to support business needs.

The survey outcomes highlight an immediate need for strategic planning and investment to address industrial land shortages and infrastructure gaps. Key priorities include:

- Allocate and release appropriately sized, serviced lots in Jurien Bay and other suitable locations to meet projected demand.
- Improve power, water, waste management, and freight logistics; prioritize reliable internet and telecommunications.

- Facilitate residential development and affordable accommodation to attract and retain workforce.
- Streamline regulatory processes and introduce local government support for existing businesses and start-ups.
- Leverage opportunities in tourism, renewable energy, and agribusiness to strengthen resilience and competitiveness.

Proactive measures to address these issues may position the Shire as a competitive and sustainable industrial hub and may also alleviate constraints on business growth and regional economic development.

2.2 Industrial Land Market Assessment

Econisis prepared the Industrial Land Market Assessment (ILMA) which is included in **Appendix C**. National and Regional trends indicate:

- An increase in need for warehousing, fulfilment centres and transport capacity.
- Distribution networks are expanding, and operators continue to seek land suited to truck access, storage and logistics activity.
- Employment in electricity, gas, water and waste services has increased as investment in renewables, grid upgrades and waste infrastructure grows.
- Wholesale trade activity is stable and manufacturing employment declines however small fabrication and mechanical repairs remain stable.

The National trends also relate to the local and regional context which include:

- Local industry composition shows a base of land-intensive users across transport, manufacturing, wholesale trade and utilities.
- Growth in regional mining and renewable energy projects is increasing demand for contractor depots, equipment storage and laydown areas.
- Tourism-related activity in Jurien Bay and Cervantes also supports trade businesses that commonly locate in industrial precincts.
- Transport, manufacturing, wholesale trade and utility services are the primary drivers of industrial land demand in regional areas, and these sectors strongly influence absorption patterns in Dandaragan. Freight growth, expanding regional supply chains and continued construction activity across the Wheatbelt and Mid-West contribute to steady underlying demand.

These drivers point to consistent absorption of industrial land over time, with short-term peaks likely during periods of project construction, renewables delivery or increased agricultural servicing needs. As these industries continue to expand or contract in response to broader economic conditions, they will remain the key determinants of how quickly industrial land is taken up in the Shire.

Dandaragan holds a varied share of the industrial workforce in the Sub-Region (Shire of Dandaragan, Coorow and Gingin) accounting for 23.8% of Manufacturing jobs, a similar share of Wholesale Trade jobs at 28.8%, and a higher share of Transport, Postal and Warehousing jobs at 44.7%. In total Dandaragan accounts for 31.7% of all industrial jobs across the three LGAs. These shares show that while some industrial sectors are evenly distributed across the region, transport, postal and warehousing activity is strongly centred in Dandaragan.

The report highlights the following:

- The Shire of Dandaragan is experiencing a significant pipeline of major projects (40 identified projects) across renewable energy, State Government infrastructure, intensive agriculture, mining/gas and tourism. Some large projects located outside the Shire are still expected to drive accommodation, workforce and service demand within Dandaragan (eg. the $1.5b Caravel Copper Project).
- The labour market is built around primary production, resource activity and construction, with all other industries each making up only small individual shares.
- Demand patterns show that the Shire of Dandaragan requires a mixed estate approach: small to mid-size lots for day-to-day local industry (1000m2-5000m2 lots), with a supply of larger lots for regionally oriented transport and logistics activity (above 1 hectare).
- There is a total of 41ha of developed and occupied industrial land within the Shire, and approximately 1.5ha of vacant serviced industrial land across these localities.
- Industrial land demand is demonstrated by Econisis using four scenarios (see Figure 5 below). The Scenarios are based on National Industry Trends, Local Employment Trends, Population led, and Project led. These scenarios vary in projected land demand indicating growth from current supply of 39.6 hectares (occupied land) to between 41ha and 73ha by 2036. Econisis reviewed the scenarios and established that the Local Employment Led scenario was the best gauge for demand requiring 60 ha of land by 2026. Econisis reviewed the project-based population scenario in the demand model (Prepared by Geographia from the Shires Growth Plan), which reveals industrial land demand under this scenario will peak at 73 ha by 2034 which is significantly higher than trend-based scenarios. After 2034, demand falls sharply in this scenario as major projects complete and temporary population drops, converging with the long-term Local Employment Trends scenario at around 60–61 ha by 2036.
- Annual take up rates of industrial land vary between 0.3ha per annum and 1.4ha per annum in 2026. While take up rates are projected to be consistent in the National Industries Trend and Population Led scenarios, they are expected to climb annually, under the Local Employment Trends scenario, reaching 2.4ha per annum by 2036.
- Overall, meeting industrial demand in the Shire of Dandaragan has the potential to add a further $36.61m to $173.41m over a decade to the local economy (present value at 7%), depending on the demand scenario.

FIGURE 5: ECONISIS INDUSTRIAL LAND DEMAND SCENARIOS

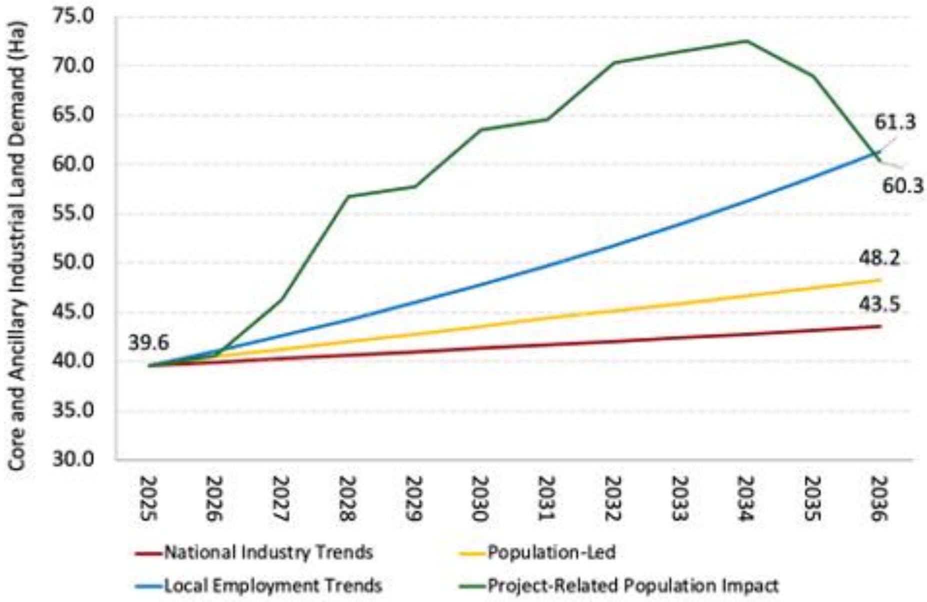


Figure 17 Rebased Industrial Land Demand Projection Scenarios, Dandaragan (S), 2025 to 2036

- Econisis estimates one additional hectare of industrial land in the Shire of Dandaragan can generate $24.60m in Gross Value Added for the Shire of Dandaragan economy over 10 years (present value at 7%).
- Econisis estimates that the unit value of one hectare of additional industrial land (zoned, serviced and occupied) that can be attributed to the land development itself is $6.2m over 10 years (present value at 7% discount rate).

3.0 Industrial Land Supply

TABLE 1: SHIRE OF DANDARAGAN ESTIMATED INDUSTRIAL LAND SUPPLY (AS AT MARCH 2026)

Location	Total Industrial zoned land (ha)	Total subdivided zone land(ha)	No of lots	Lots Vacant	Lot size
Cervantes – Seville Industrial Area (Incl 6 lots located in Parks and Recreation reserve)	21	8 ha	27	1	Approx. 2,000m^2 (range 1700-2900m^2)
Jurien Bay - Carmella Industrial Area	10	10	38	0	Lots average 2000m^2 (ranging from 1300m2 – 3000m2). 3-4 larger lots of 6000-8000m^2)
Jurien Bay - Coalseam Industrial Area	96	11	39	11	2000m^2 with 2 lots approximately 3000m^2. Four recently created lots are 1000m^2. The 11 vacant lot are sold, and building approvals are being issued for the majority of these lots
Badgingarra Industrial	6.7	6.7	12	6	Range of lot sizes between 2500m^2 – 4200m^2.
Dandaragan Industrial Area	5.4	5.4	7	0	7 lots – 5 smaller lots ranging between 1300 - 2300m^2. The Dandaragan works depot 1.02 ha (and additional shire land 1.42 ha
Total Industrial zoned land	**139.1ha**	**Approximately 41 hectares**	**Approximately 123 lots.**	**18**	**Majority of Lots are between 2000m^2- 3000m^2.**
Proposed Turquoise Coast Industrial Area	24ha	0	Proposed 25 Industrial Lots and 18 light Industrial Lots		
Cervantes Marine Services	7.2ha	0	6 allotments (crown reserves). Limited development. Sailing club.		
Jurien Harbour Reserve	11.5 ha	8.5. ha	The Harbour zone is approximately 50.8 hectares (including seabed). The total 'subdivided zoned land' figure of 8.5ha is an estimate of the area developed for Maritime Industry and Recreational Boating facilities. There is approximately 3 hectares potential for additional Maritime Industry and 16 ha of land requiring investigation to determine suitable land use. This doesn't include the Coastal Protection or Tourism Precincts.		

The Shire of Dandaragan Industrial Land Supply indicated in Table 1 above is based on a desk top assessment using Landgate, the Shire of Dandaragan POZI mapping system and DPLH data. There is currently a total of 139.1 hectares of land zoned 'Industrial' under the Shire of Dandaragan Local Planning Scheme No.7 (LPS7). Approximately 41 hectares of the Industrial zoned land is serviced providing approximately 123 lots, which predominantly range in size between $2000m^2$-$3000m^2$. Based on this assessment there is currently 98 hectares of undeveloped/serviced Industrial zoned land remaining in the Shire of Dandaragan

There are currently 18 vacant lots in the serviced Industrial Areas in the Shire of Dandaragan (March 2026). Eleven of these vacant lots were recently created by Development WA (2025) in the Coalseam Industrial Area which have all been sold and are earmarked for development (i.e. planning and building applications have been approved for the majority of the lots). There is one vacant lot in the Seville Industrial area, and six vacant lots in the Badgingarra Industrial Area. This unoccupied land accounts for 1.5 ha – 2 ha of the serviced Industrial zoned land. Therefore approximately 96% of zoned and serviced industrial land is occupied, with 39.5 hectares of 41 hectares developed, indicating a marked lack of available land to meet the demand.

Cataby and Regans Ford are not detailed in this review; however, both are identified in the Shire's Local Planning Strategy as highway service centres servicing the Brand Highway and surrounding rural communities. Cataby is located proximate to the Cooljarloo heavy mineral sands operation, which is subject to a State Agreement. In this context, these service centres may play a supporting role in accommodating ancillary and service-based activities associated with mining, resource development and rural industries over time. While their current planning role is primarily oriented toward highway services and short term accommodation uses, their strategic location warrants consideration of how future industrial land needs, particularly those aligned with the renewable and resources sector, could be appropriately supported within the planning framework.

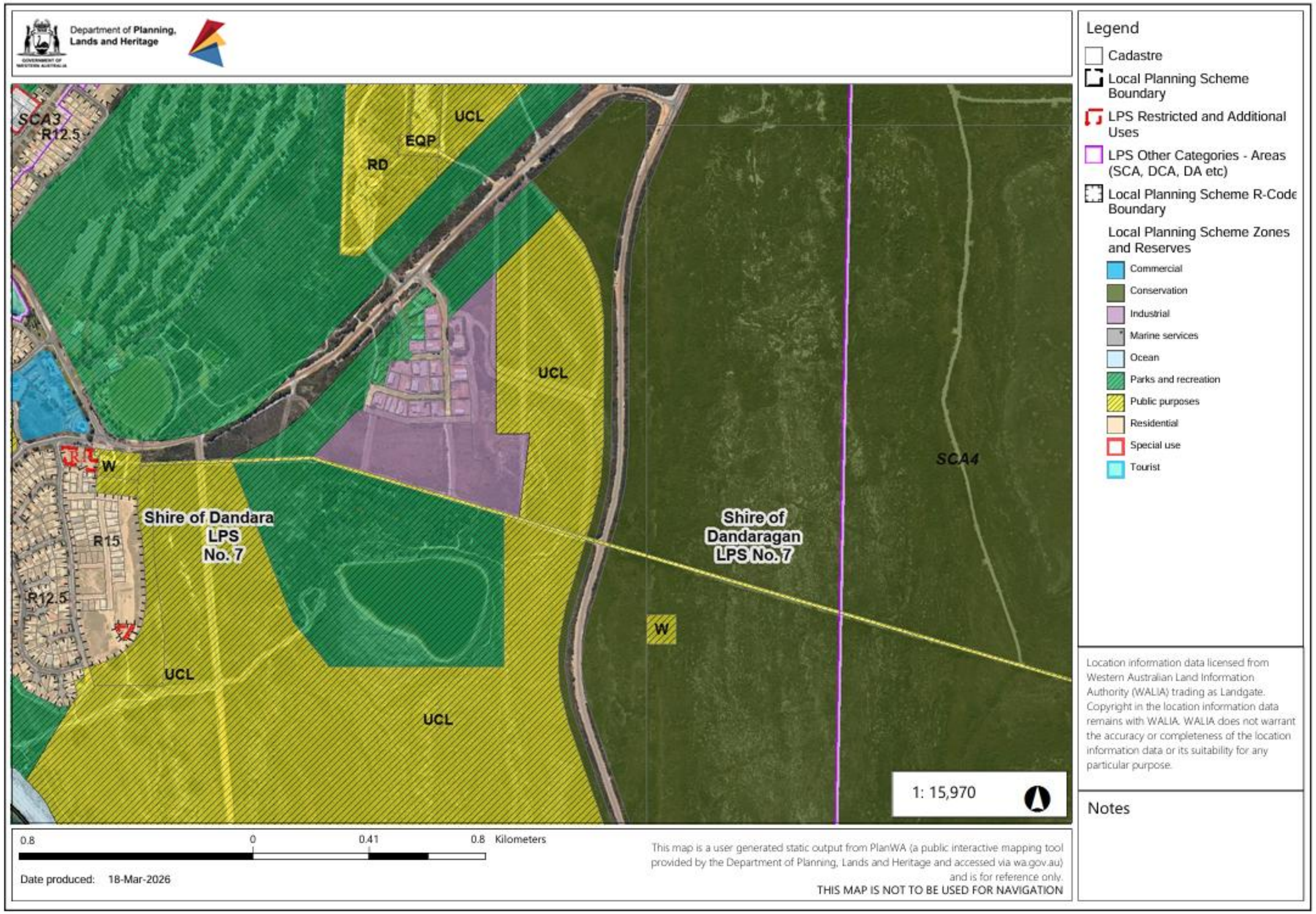
Section 3.1 below includes Tables 1-7 summarising each industrial-zoned area in the Shire, outlining development status, lot size, servicing, environmental constraints, and access. The Table also identifies development challenges and potential expansion opportunities.

3.1 Shire of Dandaragan Industrial Localities

3.1.1 Cervantes Townsite

Seville Industrial Area (Map 1) is located west of Indian Ocean Drive, east of the townsite of Cervantes and north of Lake Thetis. The Cervantes Marine Services (Map 2) is located on the northern coastal foreshore in the townsite.

Map 1: Seville Industrial Area



<table>
<tr><th>Table 1</th><th colspan="2">Seville Industrial Area</th></tr>
<tr><td>Total Zoned Area</td><td colspan="2">21.2 ha</td></tr>
<tr><td>LPS 7 Zoning</td><td colspan="2">Industrial Zone, Parks and Recreation reserve</td></tr>
<tr><td>Planning Framework</td><td colspan="2">Local Planning Scheme No.7.Local Planning Strategy Table 4.3, Action 5 “Consolidate industrial land uses within the existing Cervantes industrial area and ensure separation from sensitive land uses in accordance with (draft) State Planning Policy 4.1.” Section 6.5 states that expansion of the Seville Industrial Area is constrained by environmental factors.</td></tr>
<tr><td>Surrounding Land Use</td><td colspan="2">Immediately North and West of the Industrial zoned land is ‘Parks and Recreation’ reserve. Lot 1117 Indian Ocean Drive east of the Industrial area is 24.6 ha of UCL (unvested crown land) reserved for ‘Public Purpose’. South of the Seville industrial area is Lake Thetis which is reserved for ‘Parks and Recreation’.</td></tr>
<tr><td>Land Development Status and Tenure</td><td colspan="2">The majority of the subdivided areas of the Seville Industrial Area are developed and occupied, which includes approximately 8 hectares of Industrial zoned land. There are 27 lots in total with access to Bradley Loop and Gazeley Way. Six allotments in the northern portion of the Seville Industrial Area designated as ‘Parks and Recreation’ reserve are developed for Industrial purposes except for Lot 500 Gazeley Way (Crown Reserve 50024 vested in the Shire of Dandaragan) which is vacant. 21 Lots are zoned Industrial with one currently vacant (Lot 812 Gazeley Way, Cervantes (privately owned)).</td></tr>
<tr><td>Average lot size</td><td colspan="2">Approx. 2,000m^2 (range 1700m^2-2900m^2)</td></tr>
<tr><td>Current Uses</td><td colspan="2">Warehousing, depot, light industrial, service industries i.e. mechanics and repairs etc.</td></tr>
<tr><td rowspan="4">Current servicing</td><td>Power</td><td>Available</td></tr>
<tr><td>Water</td><td>Reticulated Water servicing. Water extends through the Industrial area and connects to the town supply.</td></tr>
<tr><td>Sewerage</td><td>Not available at present.</td></tr>
<tr><td>Roads/Transport</td><td>Bradely Loop and Gazeley Way constructed and sealed roads with access to Cervantes Road.</td></tr>
<tr><td>Serviceability</td><td colspan="2">Should future development be required, the existing Water Corporation reticulated water system can be extended to service these lots. Increasing demand may require an upgrade to a DN150 water reticulation pipe. The Water Corporation should be consulted to ensure there is adequate capacity and pressure in the scheme to cater for additional development.

The Water corporation long-term plan shows that this area is to be serviced by WWPS ‘E’ which is planned to discharge future WWPS ‘C’. Neither of these are on the Water Corporation’s 5-year capital program.</td></tr>
<tr><td>Environmental characteristics</td><td colspan="2">The Cervantes townsite and surrounds is recognised as part of a ‘Threatened Ecological Community’ (TEC’s) and within an ‘Environmentally Sensitive Area’ (ESA’s). Specially Protected threatened and priority fauna are noted to be located at Thetis Lake</td></tr>
</table>

	south of the Seville industrial area. The remaining undeveloped Industrial zoned land and surrounding land is recognised as containing Remnant Vegetation.
Native Title/Aboriginal Heritage	Native title determination. There are not any specific areas registered as significant for cultural heritage in and adjacent to the Seville Industrial Area. The Yued Aboriginal Corporation have provided future land use intentions for portions of Unvested Crown Land under the Noongar Land Estate indicating the potential to consider Industrial use on Lot 1117 Indian Ocean Drive, and/or Lot 501Seville Street.
Transport Linkages	Indian Ocean Drive via Cervantes Road. RAV 4 rating.
Bushfire	Bushfire Prone
COMMENT/POTENTIAL	The existing undeveloped Industrial land is constrained with the presence of high-quality native vegetation with TEC's, ESA's, native title considerations and Bushfire risk. Currently, approximately 13 ha of Industrial-zoned land is constrained for development due to these factors. As detailed in the Local Planning Strategy, the Seville Industrial area is unlikely to be suitable for expansion due to the high conservation value of the land adjacent to Lake Thetis. Further investigation into the potential for expansion of the Seville Industrial Area within the existing zoned land, or on Noongar Land Estate (unvested crown land)to the east (Lot 1117 Indian Ocean Drive) and/or on land further north of town (Lot 501 Seville Street), requires technical environmental investigations to assess the suitability of the land to accommodate industrial development in consideration of the TEC's and ESA's, and bushfire risk. This process will require engagement with DPLH lands, DBCA, DWER, DFES and Yued Aboriginal Corporation. See notes in section 3.2.1.6 relating to the considerations of ESA's and TEC's. The demand analysis indicates low to moderate demand for additional industrial lots to service the town of Cervantes. Any changes to the zoning to accommodate industrial zoned land would require comprehensive investigations in addition to the environmental investigations (i.e. such as traffic, transport, infrastructure/servicing and stormwater management) to inform an Amendment to the Shire of Dandaragan Local Planning Strategy and subsequent amendments to the Shire of Dandaragan Local Planning Scheme. If these investigations confirm that portions of the existing Industrial-zoned land, particularly the southern area requiring adequate separation from Lake Thetis, are unsuitable for development, the Local Planning Strategy and Scheme may need to be updated to reclassify this land for conservation purposes.

Map 2: Cervantes Marine Services

Table 2	**Cervantes Marine Services**	
Total Zoned Area	7.2ha	
LPS 7 Zoning	Marine Services Zone and SCA 3- Coastal Hazard Risk.	
Planning Framework	Local Planning Scheme No.7 objective for Marine Services Zone -*To provide fishing related activities to support the fishing industry, community and tourism uses.* Light and Service Industry and Warehouse is a 'D' (Discretionary) use There is potential for light and service industry to be developed within this zone. Local Planning Strategy references in Section 6.3 Table 29 and in Section 6.5.	
Surrounding Land Use	Immediately North of the Marine Services zoned land is 'Public Purpose' reserve (UCL unvested crown land). 'Parks and Recreation reserve' is adjacent to the 'Marine Services' zone along the coast, and east of the UCL. South of the 'Marine Services' zone is the Lobster Shack located in a 'Special Use zone' under LPS7.	
Land Development Status	Marine Services zone consists of Crown Land Reserves: • Lot 897 and 899 (Reserve 48571) Vesting order (Minister for Transport) Agency (Department of Transport and Major Infrastructure) (purpose marine related industry, trailer parking and buffer zone) • Lot 898 (Reserve 48570) Management order Minister for Transport. (Current purpose – Harbour) • Lot 897 Vesting order (Minister for Transport) Agency (Department of Transport) (purpose marine related industry, trailer parking and buffer zone). • Lot 617 8 Beach Road, Cervantes (Reserve 47597) Reserve class C. Current purpose Sailing club. Management order Shire of Dandaragan. Agency DPLH. • Lot 618 20 beach Road Cervantes (Access to foreshore is the purpose) land use 1 (use and benefit of Aboriginal Inhabitants). Vesting: Management order Shire of Dandaragan. Responsible agency DPLH.	
Average lot size	N/A	
Current Uses	Location of infrastructure and Fin Fishers club house. Remainder is undeveloped/vacant.	
Current servicing	Power	Available – confirm capacity
	Water	Reticulated Water servicing connects to the southern portion of the Marine Services land.
	Sewerage	Not available
	Roads/Transport	Partially constructed Catalonia Street, Beach Road is gravel.
Serviceability	Limited Servicing. Extensions required. Agency advice is not available. The Water corporation long -term plan shows that this areas is to be serviced by future WWPS B.	
Environmental characteristics	Remnant Vegetation. Threatened ecological communities. Environmental Sensitive Area. Located in a Coastal Hazard Risk Area.	

Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register. The UCL land north of this precinct is within the Noongar Land Estate.
Transport Linkages	Indian Ocean Drive via Cervantes Road, Aragon Street and Brown Street.
Bushfire	Bushfire Prone
COMMENT/POTENTIAL	The area is constrained with presence of high-quality native vegetation with TEC's and ESA's, Bushfire risk and Coastal Hazard. Servicing fronts are limited. The area requires significant technical investigation to address environmental considerations, coastal and bushfire hazards to determine the development potential of the area. Should the technical investigations reveal suitability for development this would need to be considered with preparation of a precinct or local development plan and foreshore management plan. Land use planning for this precinct would need to be a collaborative exercise involving the Department of Transport and Major Infrastructure, Department of Planning Lands and Heritage (DPLH) and the Shire of Dandaragan. It is considered that this site would be investigated in response to a catalyst proposal or in the medium/longer term.

3.1.2 Jurien Bay

Jurien Bay townsite includes three areas studied under this ILNR and includes the Carmella Industrial Area (See Map 3 and Table 3), Coalseam Industrial Area (See Map 4 and Table 4) and Jurien Bay Boat Harbour (See Map 5 and Table 5).

Map 3: Carmella Industrial Area

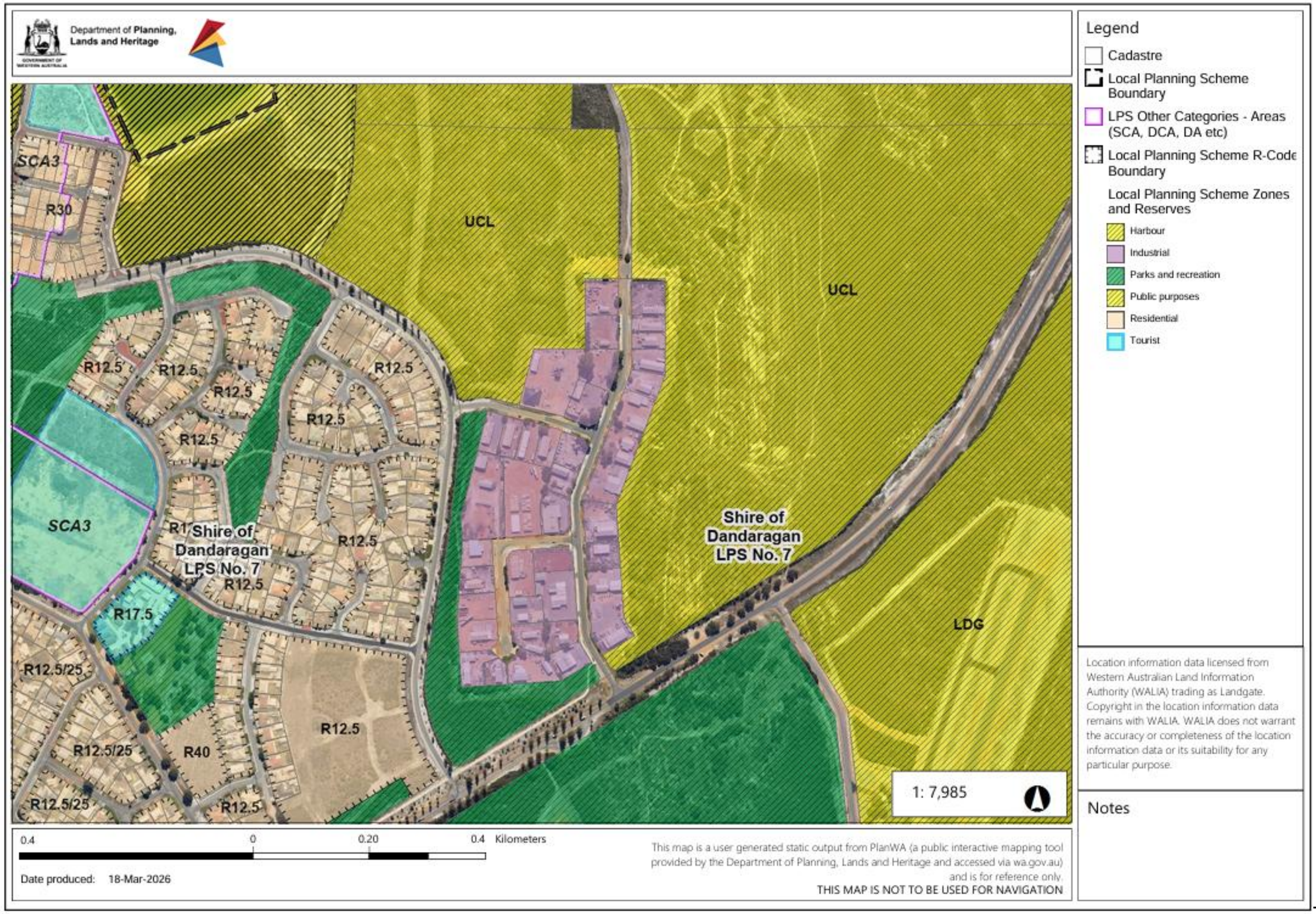


Table 3	Carmella Industrial Area	
Total Zoned Area	9.97ha	
LPS 7 Zoning	Industrial	
Planning Framework	Local Planning Scheme No.7. Local Planning Strategy Table 15 Action 17 states that 'This area is substantially developed, and expansion is not proposed as there are other areas identified for future industry. '	
Surrounding Land Use	Carmella Industrial Area is located east of Residential area of town and southeast of the Jurien Bay Bat Harbour. Coalseam Industrial area and the Airport are located to the east. Immediately north and west of the Carmella industrial Area is land reserved for 'Public Purpose' which is unvested crown land under the ILAU (Yued Aboriginal Corporation). The UCL contains remnant vegetation, however, isn't constrained by TEC or ESA's or Aboriginal cultural heritage sites.	
Land Development Status	The Carmella Industrial Area is entirely developed. There are 38 lots in total with access from Bashford Street on into Carmella Street, and Boulanger Way.	
Average lot size	Range of lot sizes (3-4 larger lots of 6000m^2-8000m^2) Many lots average 2000m2 (ranging from 1300m^2– 3000m^2)	
Current Uses	Light industrial and service industrial uses	
Current servicing	Power	Serviced
	Water	Reticulated Water servicing. Supply is at capacity. See serviceability below.
	Sewerage	Not available
	Roads/Transport	Access from Bashford Street and the Jurien Boad Harbour via Samphire Pass. The constructed portion of Carmella Road terminates in a cul de sac and the remainder of Carmella Road north and Samphire Road are unconstructed.
Serviceability	Adjacent to all services. Water Corporation advises that the Carmella Industrial Area is located within the Jurien Water Zone, currently serviced by DN100's. Intensification in this area may require upgrades to DN150. The Carmella Industrial Area is outside of the Water Corporation Jurien Sewer District. In the longer term if a reticulated sewer connection is required for this area, Water Corporation Asset Investment Planning would investigate, based developer's intentions such as yield and potential flow from the new development.	
Environmental characteristics	Remnant Vegetation.	
Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register. Consultation with Yued. The Yued Aboriginal Corporation intentions for the adjacent UCL proposes Rural land use to the east, and Residential and Tourism uses for the land to the north of the Carmella Industrial precinct.	
Transport Linkages	Indian Ocen Drive Via Bashford Street, to Brand Highway via Jurien Road East.	
Bushfire	Bushfire Prone	

COMMENT/POTENTIAL	No further development potential is possible in the existing Carmella Industrial Area. The transport link between Carmella Industrial area and the Boat Harbor provides direct access from Carmella Industrial Area to potential for marine and harbour related industries. Investigate the feasibility of constructing and upgrading the Carmella Road reserve and Samphire Pass to enhance access and support potential integration with the RAV network. Consideration of the highest and best use for the adjacent Crown land will need to ensure that it does not introduce sensitive uses that may undermine the industrial area, and that any future uses maintain appropriate separation distances from the proposed residential areas.

Map 4: Coalseam Industrial Area

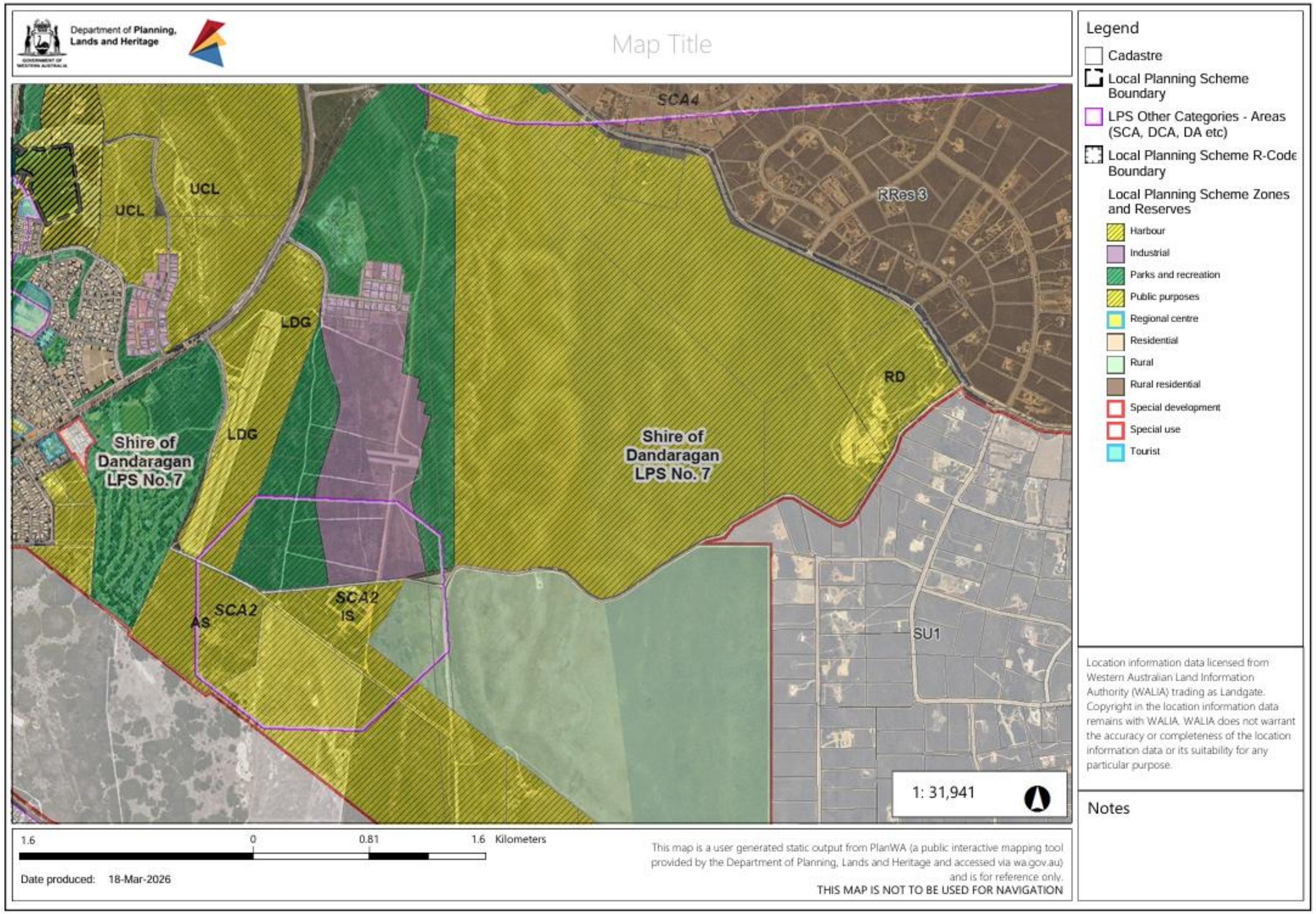


Table 4	**Coalseam Industrial Area**
Total Zoned Area	95.8
LPS 7 Zoning	Industrial and Special Control Area 2 – Wastewater Infrastructure
Planning Framework	Local Planning Scheme No.7. Local planning Strategy Table 15, Action 18. Section 6.5.1. Part 1, 4.3 action 3 states 'Provide for industry growth through the expansion of the Coalseam Road Industrial Area and ensure separation from sensitive land uses in accordance with draft State Planning Policy 4.1'. *Jurien Bay Growth Plan: Volume 2 September 2012* (See Figure 14.2 extract in Figure 6 below) identifies significant potential for further expansion of the Coalseam Industrial Area. The Coalseam area and surrounds is noted as item '18. Industrial Area, Coalseam Road (~110ha). There are 27 lots most of which are developed and 2 stages planned for expansion to provide an additional 45 lots. Assessment regarding native title, environmental assessment and infrastructure is required for future stages.'
Surrounding Land Use	Coalseam Industrial area is located approximately 1km east of Carmella Industrial Area and is situated adjacent to the Shire of Dandaragan Airport. In the southern part of the Industrial zoned land is the water corporation wastewater treatment plan. The Go Cart and Motorcross club is located north of the Coalseam industrial area. The majority of land within and adjacent to the Industrial zone is crown reserve. Jurien Bay airport is situated to the west of the Coalseam Industrial Area. The Local Planning Strategy states that based on studies the airport has sufficient capacity for 20 years and an alternative location for a regional airport is to be investigated for the longer term. *Wheatbelt Aviation Strategy Ministerial Taskforce – Final Report 2010*, recognized that improved airport facilities will be required at the Jurien Bay Airport in the longer term. The *2020 Jurien Bay Airport Masterplan* resulted in the development of an east west runway of 875metres which traverses the Coalseam Industrial Area. The airport master plan includes a recommendation to develop airside industrial hangar sites on the northern taxiway of east west runway, and suggests potential residential airpark lots to the south of the runway. The *Turquoise Coast Regional Airport Masterplan* prepared in 2014 prepared a site options assessment and recommended that in the long-term airport expansion would recommend relocation to the corner of Munibinea Road and Jurien Road. A Wastewater Treatment plant is located south of the Industrial zone and the buffer area of the SCA for this WWTP encroaches into the Industrial zone
Land Development Status	Approximately 11 hectares of the zone area is subdivided. The Coalseam industrial area comprises 39 lots. 11 lots were released in 2025 and are all sold. These 11 lots subject of planning and building approvals. In total there are 13 vacant lots, however they are all privately owned and earmarked for developed, so technically not available in the current market.

Average lot size	The majority of lots sizes are approximately 2000m^2 with 2 lots approximately 3000m^2. Four recently created lots are 1000$m^{2.}$	
Current Uses	General industrial uses. Adjacent to the airport.	
Current servicing	Power	Serviced – system – expansion subject to review and application to Western Power.
	Water	Reticulated Water service available. See serviceability section below.
	Sewerage	Reticulated service available currently supported by a process of tankering.
	Roads/Transport	Bashford Road, Roads constructed and sealed.
Serviceability	Adjacent to all service fronts. The Water Corporation Jurien Water Zone does not have any capacity within the existing scheme for additional water connections until the new production bore has been delivered, which is earmarked for 2027. The capacity of the bore expansion in 2027 to support expansion at Coalseam is unknown. To receive additional water will require the upgrade of a section of existing DN200 along Jurien East Drive to a greater size to be determined during the water corporation scheme planning study. This project is currently outside the Water Corporation's 5 Year Capital Program, and delivery is unknown at this stage. The Coalseam Industrial Area is currently within the Jurien Sewer District. This area is planned to be served by Wastewater Pump station (WWPS) D', WWPS 'D' is currently not in the Corporation's 5-Year Capital program.	
Environmental characteristics	Remnant Vegetation on and surrounding the Industrial area. (No TEC, no ESA's). Water management is a key consideration.	
Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register. The Yued Aboriginal Corporation landholders of adjacent crown land.	
Transport Linkages	Indian Ocean Drive Via Bashford Street, to Brand Highway via Jurien East Road. Indicative Indian Ocean Drive bypass alignment to the east of the Coalseam industrial area	
Bushfire	Bushfire Prone	
COMMENT/POTENTIAL	The Coalseam Industrial area has potential for development. The benefit of the site is that it is the only reticulated serviced wastewater Industrial area in the Shire of Dandaragan serviced with reticulated wastewater. Short to medium term supply of industrial lots in this location is dependent on expansion of water, power and sewerage services. There is currently approximately 87.5 hectares of undeveloped zoned industrial land in the Area. While the undeveloped portion of the industrial precinct contains remnant vegetation there is no requirement to protect TEC's or ESA's or cultural	

	heritage registered sites, and therefore the subdivision process is relatively straight forward requiring clearing permits and bushfire assessments. The east – west airport runway intersects the Coalseam industrial area separating the industrial zone into north and south. The portion of the industrial zoned land north of the runway and south of the development front is approximately 28 hectares. Longer term expansion of the Coalseam industrial area to the south of the airport east- west runway is dependent airport planning. It may be appropriate to note these areas for further investigation regarding the potential relocation of the Jurien Bay Airport, in consultation with the Airport Working Group. The Yued Aboriginal Corporation advise that UCL separating the airport runway and Coalseam industrial zone is intended to be explored for future industrial use. Figure 14.2 of the Shire of Dandaragan Growth Plan 2012 (shown as Figure 6 below) identifies a broader area of approximately 190 hectares north and west of the existing Coalseam Industrial Area for potential future industrial investigation. Of this area, around 100 hectares is currently zoned Industry. This broader investigation area could be incorporated into the local planning framework, such as being identified as an industrial development investigation area within the Local Planning Strategy and progressed through rezoning under the Local Planning Scheme.

FIGURE 6: JURIEN BAY GROWTH PLAN 2012 EXTRACT

Map 5: Jurien Bay Boat Harbour

<table>
<tr><th>Table 5</th><th colspan="2">Jurien Bay Boat Harbour (JBBH)</th></tr>
<tr><td>Total Zoned Area</td><td colspan="2">30.28ha</td></tr>
<tr><td>LPS 7 Zoning</td><td colspan="2">Harbour zone (the Harbour zone boundary is highlighted brown in Map 5) and also SCA 3- Coastal Hazard Risk</td></tr>
<tr><td>Planning Framework</td><td colspan="2">Local Planning Scheme No.7. Local Planning Strategy Section 4.3 Action 2,4.9 Action 6. Table 15 Action 15 and 16. Reference section 6.5, and 9.5 in Part 2. DOT Jurien Bay Boat Harbour Development Plan 2017 – The Harbour zone is approximately 50.8 hectares (including seabed). There is approximately 8.5ha of the area developed for Maritime Industry and Recreational Boating facilities. There is approximately 3 hectares potential for additional Maritime Industry and 16 ha of land requiring investigation to determine suitable land use. This doesn't include the Coastal Protection or Tourism Precincts.</td></tr>
<tr><td>Surrounding Land Use</td><td colspan="2">The Boat Harbour is located approximately 2 km north of the Jurien Bay townsite. South of the Harbour is the residential area of town. To the north and east comprises land predominately reserved for "Public Purposes" on Unallocated Crown land which is part of the Noongar Land Estate.</td></tr>
<tr><td>Land Development Status</td><td colspan="2">The land within the JBBH comprises Crown land reserve R39419 proclaimed under the Marine and Harbours Act 1981 (MH Act) and vested under the Land Administration Act Management Order for "Harbour Purposes". The JBBH is operated by the DTMI under the provisions of the Marine and Harbours Act 1981 and DTMI are responsible to construct, provide and maintain facilities and services, on land and in water that are desirable to meet the needs of effective and efficient shipping and boating, both recreational and commercial. Reserve 39419 is made up of three parcels: Certificate of Title Volume 3117, Folio 168 2. Certificate of Title Volume 3122, Folio 491 3. Certificate of Title Volume 3140, Folio 577. The total area of the JBBH, including water areas, is 30.28 ha. The Marina is located approximately 1 km via Samphire Pass and Carmella Street to the Carmella Street industrial Area.</td></tr>
<tr><td>Average lot size</td><td colspan="2">N/A development in a reserve.</td></tr>
<tr><td>Current Uses</td><td colspan="2">The boat harbour is a fully integrated facility with 69 mooring pens, four service jetties and public car parking and toilet facilities and provides the primary boat maintenance facility between Geraldton and Two Rocks.</td></tr>
<tr><td rowspan="4">Current servicing</td><td>Power</td><td>Serviced – connection from Carmello Industrial Area</td></tr>
<tr><td>Water</td><td>Available within the Jurien Water supply boundary.</td></tr>
<tr><td>Sewerage</td><td>Not available</td></tr>
<tr><td>Roads/Transport</td><td>Access from Harbour Drive or via Samphire Pass/Carmella Street</td></tr>
<tr><td>Serviceability</td><td colspan="2">Adjacent to all services. The marina area has an existing water connection which services the entire marina area. Should this area become industrial, the existing water reticulation should suffice; however, the DN200 upgrade project may be required, and further investigation is necessary to confirm.</td></tr>
</table>

	The marina area is within the Jurien sewer district; the catchment is its own WWPS catchment and requires pumpstation 'A' to be constructed. WWPS A is not within the Water Corporation's 5-Year capital program.
Environmental characteristics	Contains Remnant Vegetation (no SCA's and ESA's). Coastal Hazard area.
Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register. Land immediately east of the harbour zone is in the Noongar Land Estate and controlled by the Yued Aboriginal Corporation indicating the intention for future Tourism uses in this location.
Transport Linkages	Harbour drive into town. Access Bashford Street via Samphire/Carmello Street.
Bushfire	Bushfire Prone
COMMENT/POTENTIAL	Development in accordance with the Local Development Plan and subsequent revisions. Opportunity for 11.5 hectares for industrial (marine) related development. Certain uses may be limited by nearby sensitive land uses of residential and future tourism. Connectivity to Carmella industrial area may be improved via extension and upgrades to Carmella Drive and Samphire Pass. Opportunity for the extension and upgrade of this road network to provide the option for larger vehicles (RAV network) and harbor traffic to avoid residential areas.

3.1.3 Badgingarra

Map 6: Badgingarra Industrial Area

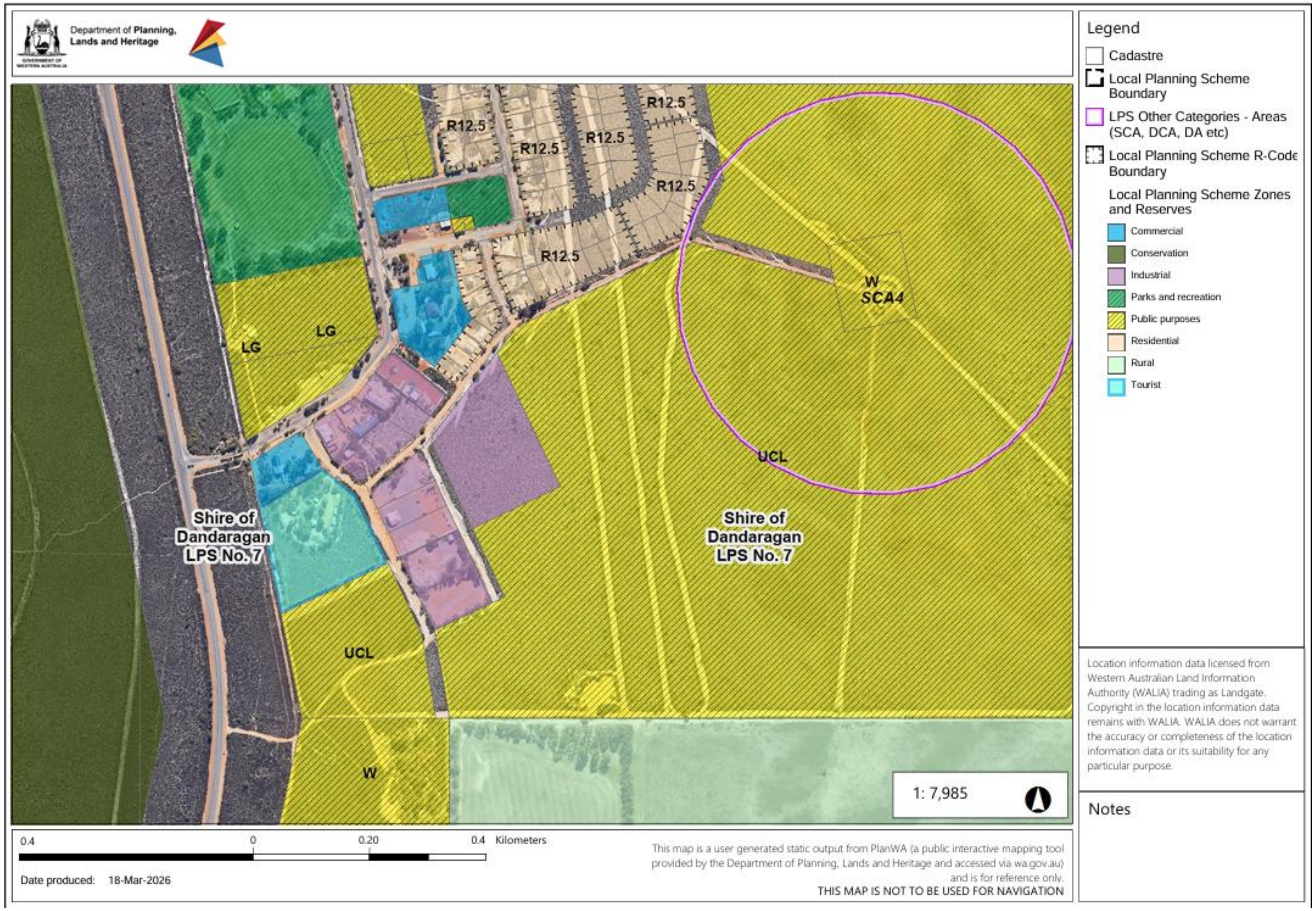


Table 6	Badgingarra Industrial Area	
Total Zoned Area	6.74ha	
LPS 7 Zoning	Industrial	
Planning Framework	Local Planning Scheme No.7. Local Planning Strategy Section 3, 6.5.	
Surrounding Land Use	Located south of town, east of tourist/commercial zoned land. Adjacent to Public purpose reserved land. The Local Planning Strategy (LPS) recommends the inclusion of a 'Rural Enterprise' zone into LPS8 with the action of 'Identify precincts for the Rural Enterprise Zone within or close to Dandaragan and Badgingarra that do not conflict with surrounding land uses or impact on remnant vegetation, landscape attributes and/or other environmental factors (as relevant).' The intent of the 'Rural Enterprise' zone is to provide for light industry and residential on one lot. A composite residential and light industrial zone.	
Land Development Status	The Badgingarra Industrial area comprises 12 lots of which 6 lots are occupied. Five vacant lots have access to Power and water. Lot 177 Lesueur road(2.9ha) is owned by State of WA, requires extension of power and water and construction of roads for development to occur.	
Average lot size	Range of lot sizes between 2500m^2 – 4200m^2	
Current Uses	Light industrial and service industrial uses	
Current servicing	Power	Serviced – system
	Water	Reticulated Water service connection
	Sewerage	Not available. Onsite effluent
	Roads/Transport	Access from Meagher Drive. Reimer Street and LeSuer Drive is unsealed
Serviceability	The Badgingarra area is within the Badgingarra water zone and has been catered for, reticulated mains extensions will be required to serve the area with reticulated water. There are no plans to provide sewer services to Badgingarra.	
Environmental characteristics	Not classified as remnant vegetation. No TEC's or ESA's or priority flora/fauna.	
Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register.	
Transport Linkages	Brand Highway via Meagher Drive	
Bushfire	Bushfire Prone	
COMMENT/POTENTIAL	Servicing is the key constraint to development. Future uses to consider proximity to the residential area. Development may provide the opportunity for road upgrade. Potential for future development of the Badgingarra industrial zoned land to accommodate freight/haulage uses that will require large lots and RAV access. Investigate opportunities to establish 'Rural Enterprise' zones, to support composite residential and light industrial land use, in proximity to the Dandaragan and Badgingarra townsites.	

3.1.4 Dandaragan

Map 7: Dandaragan Townsite

Table 7	**Dandaragan Industrial Area**	
Total Area	5.4 ha (2.86ha + 2.58ha (north of the town in PDWSA)	
LPS 7 Zoning	Industrial	
Planning Framework	Local Planning Scheme No,7 and Local Planning Strategy Section 3, 6.5	
Surrounding Land Use	Adjacent to Residential zoned land and Commercial in the southern Industrial zoned area. The northern industrial zoned land is north of the parks and recreation reserve and opposite rural residential areas. The Local Planning Strategy (LPS) recommends the inclusion of a 'Rural Enterprise' zone into LPS8 with the action of 'Identify precincts for the Rural Enterprise Zone within or close to Dandaragan and Badgingarra that do not conflict with surrounding land uses or impact on remnant vegetation, landscape attributes and/or other environmental factors (as relevant).' The intent of the 'Rural Enterprise' zone is to provide for light industry and residential on one lot. A composite residential and light industrial zone.	
Land Development Status	Predominantly developed.	
Average lot size	6 lots – 4 smaller lots ranging between 1300 -2300m2. And the Shire of Dandaragan works depot 1.02 ha (and shire land 1.42 ha) potentially part of the depot	
Current Uses	Light service industrial and Shire depot uses.	
Current servicing	Power	Serviced – system
	Water	Reticulated Water servicing connection., Limited Water Supply.
	Sewerage	Not available
	Roads/Transport	Topham Street, Bowman Place
Serviceability	No servicing upgrades are proposed.	
Environmental characteristics	Remnant Vegetation.	
Native Title/Aboriginal Heritage	Native title determination. Not on cultural heritage register. heritage. Consultation with Yued.	
Transport Linkages	Dandaragan Road, to Cataby Road to Brand Highway.	
Bushfire	Bushfire Prone	
COMMENT/POTENTIAL	Limited potential for expansion for industrial uses in and around Town. Potential for limited additional development. Located in close proximity to larger longer term renewable energy providers. Investigate opportunities to establish 'Rural Enterprise' zones, to support composite residential and light industrial land use that may support light trade-based businesses, in proximity to the Dandaragan and Badgingarra townsites. Anecdotal evidence of requests for additional industrial land in this location has been to support trade based businesses (i.e. electrical and plumbing) suited to rural enterprise.	

3.2 Industrial Land Supply Considerations

The 'Dandaragan Regional Land Supply Assessment (WAPC, 2020)' established a baseline understanding of industrial land availability, servicing capacity, and development readiness across the Shire. As part of the current ILNR, information has been sought from State Government and infrastructure agencies to provide an update on industrial land use considerations and constraints. The agencies contacted include Main Roads WA (MRWA), Western Power, Water Corporation, Department of Water and Environmental Regulation (DWER), Department of Biodiversity Conservation and Attractions (DBCA), Department of Planning, Lands and Heritage (DPLH), Yued Aboriginal Corporation and the Department of Transport and Major infrastructure (DTMI).

This engagement focused on obtaining current information relating to transport, servicing, heritage and environmental factors to better understand the opportunities and limitations shaping future industrial land supply, and included requests to understand the following:

- Current infrastructure capacity to support existing industrial activity.
- Ability of infrastructure networks to accommodate further industrial expansion, including any programmed upgrades, servicing extensions, or network improvements that may influence land development potential or staging.
- Proposed or planned projects within or near established industrial precincts.
- Environmental considerations influencing industrial land supply, such as clearing limitations, protection of biodiversity values, constraints associated with priority flora and fauna, water resource management requirements, and the need to avoid or mitigate impacts on sensitive environments.
- Challenges and opportunities for infrastructure and environmental management,

The following sections provide an overview of information sourced from recent engagement and provides some additional information in understanding the issues affecting current and future industrial land supply within the Shire. Please note that background information on these matters is extensively explored through existing planning reports and strategies and is not repeated below. This section addresses updated or additional high-level information received as part of this project to reveal the current status. All issues discussed below will need further comprehensive analysis as part of any project or planning process.

The table for each location details of servicing, roads and environment as provided by key agencies is outlined in section 3.1 above.

3.2.1 Infrastructure

WAPC DC Policy 4.1 Industrial Subdivision requires each industrial lot to connect to a reticulated water supply by arrangement with the water corporation. Connection to a reticulated sewerage system is a normal requirement of industrial subdivision. However, where a reticulated sewerage connection is not available this requirement may be dispensed with when the WAPC is satisfied that development will be limited to 'dry' industry and is advised by the relevant authorities that soil conditions allow for efficient on-site disposal of effluent on a long-term basis. This situation is reflected in the Shires industrial areas with the exception of Coalseam which is serviced with a reticulated wastewater system.

The Government Sewerage Policy recognises that historical reliance with on-site disposal for industrial development has led to environmental impacts and constrained future land use intensification where reticulated sewerage is absent. In areas with limited capacity to access reticulated sewerage, industrial subdivision may be considered where supported by detailed soil and site investigations demonstrating the suitability for on-site sewage and trade waste disposal. Subdivision design must also be future-focused, ensuring lot sizes, layout and servicing provisions do not preclude eventual connection to reticulated sewerage or limit longer-term intensification in accordance with the planning framework. Where the soil is adequate the Government Sewerage policy allows industrial subdivision of lots to be a minimum of $2000m^2$.

3.2.1.1 Water

Water corporation have provided an update to the 'Dandaragan Regional Land Supply Assessment (WAPC, 2020)'. Section 9.1 of the document provides an overview of the water services, and the Water Corporation advise that it can be updated with the following:

'The Jurien Bay water supply scheme has capacity constraints due to a larger amount of groundwater extracted from the existing bores and growth in the area. To address the anticipated demand growth, a project for a new production bore has been approved and is expected to be delivered within 5 years. Whilst all current service obligations will be met, until the upgrades have been completed, the Water Corporation is unable to approve any additional water connections. Until the project is complete, there is no capacity in the scheme to supply any other land use type."

The Shire of Dandaragan Industrial Areas are serviced with a reticulated water supply, and the status is generally that there is current servicing for water provision, however that there is limited capacity for expansion until projects recognised under the Water Corporation capital works program are realised. Water Corporation anticipate the provision of a production bore by 2027 under the current capital works program (March 2026). The expansion of the bore will provide an additional 100ML/year of water to a current servicing capacity of 450ML/year. Other works upgrades are not currently included in the 5-year capital works program. Future water sources are currently in planning phase and are expected to be resolved within a 7–10-year timeframe.

Engagement with Water Corporation relating to understanding the water supply capacity and demand to increase the timing for proposals under the capital works program based on evidence of immediate demand for industrial land release resolved that:

- The Shire will provide Water corporation with confirmation of known and committed developments to enable Water corporation to assess absorption of 2027–28 water source increase. The Shire will need to provide details of current Residential, industrial, tourism projects, estimated dwelling/lot number and realistic timing and staging.
- The Shire to provide evidence to Water Corporation demand forecasting team from the Industrial Land Needs Review (Supporting engagement and market analysis), Growth Plan (Geographia) with requests to inform/update timeframes of capital work program.

3.2.1.2 Sewer

The Water Corporation advise that the 'Dandaragan Regional Land Supply Assessment (WAPC, 2020)' section 9.2 of the report is to be updated to reflect an additional sewer pump station provided since 2020 '*The Water Corporation operates five sewer pump stations within the Shire, four of which are in Jurien Bay, with the other located in Cervantes."* The Hammersley Street pump station is also now existing.

Water Corporation have identified several proposed wastewater pump stations (WWPS) as indicated in Figure 7 below. Proposed WWPS (A, D and F) are not currently included in the Water Corporation 5-year Capital Works program. Proposed WWPS 'D' is required to service extensions to Coalseam Industrial Area. The Coalseam Industrial Area sewer infrastructure is operating at capacity and the current reliance on tankering cannot continue. Further industrial development requires construction of a new sewer pump station and pressure main to the wastewater treatment plant. Water Corporation provided a high-level cursory figure as to the nominal cost of this infrastructure at $6M in the current market (2026).

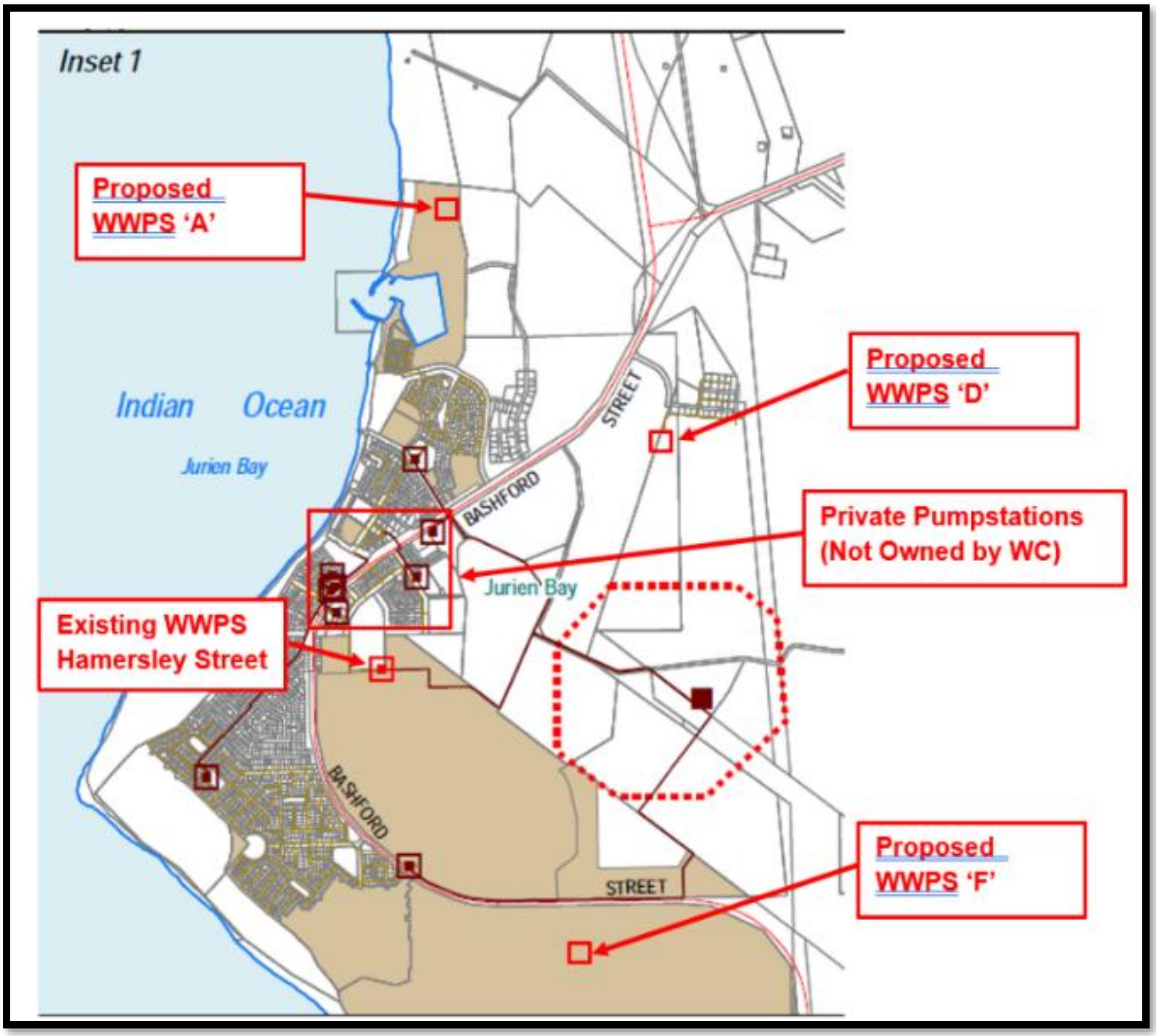
Expansion of servicing at Coalseam would occur under Water Corporation's proponent-led funding model. Under this approach, Water Corporation would fund headworks infrastructure if the project is programmed, while the developer (Development WA) would be responsible for funding and delivering reticulation. Water Corporation has encouraged the progression of a proponent-led request and submission of a Capital Prioritisation Application, noting its interest in seeing development of the pump station. However, if pursued through the Capital Prioritisation process, overall delivery would still be subject to an estimated 2–4-year timeframe for approvals and construction.

Engagement with Water Corporation relating to the limited wastewater capacity and evidence of immediate demand for industrial land resolved that:

- The Shire would work with Development WA to explore feasibility of Short-term lot release at Coalseam industrial Area and Proponent-led delivery of the sewer pump station. The Shire will support Development WA application for a Capital Prioritisation Request for the WWPS.
- Investigate short-term low lot yield opportunities. Liaise with Water Corporation to identify whether there is any potential for limited industrial lots to be serviced via reticulation extensions only and no new pump station.

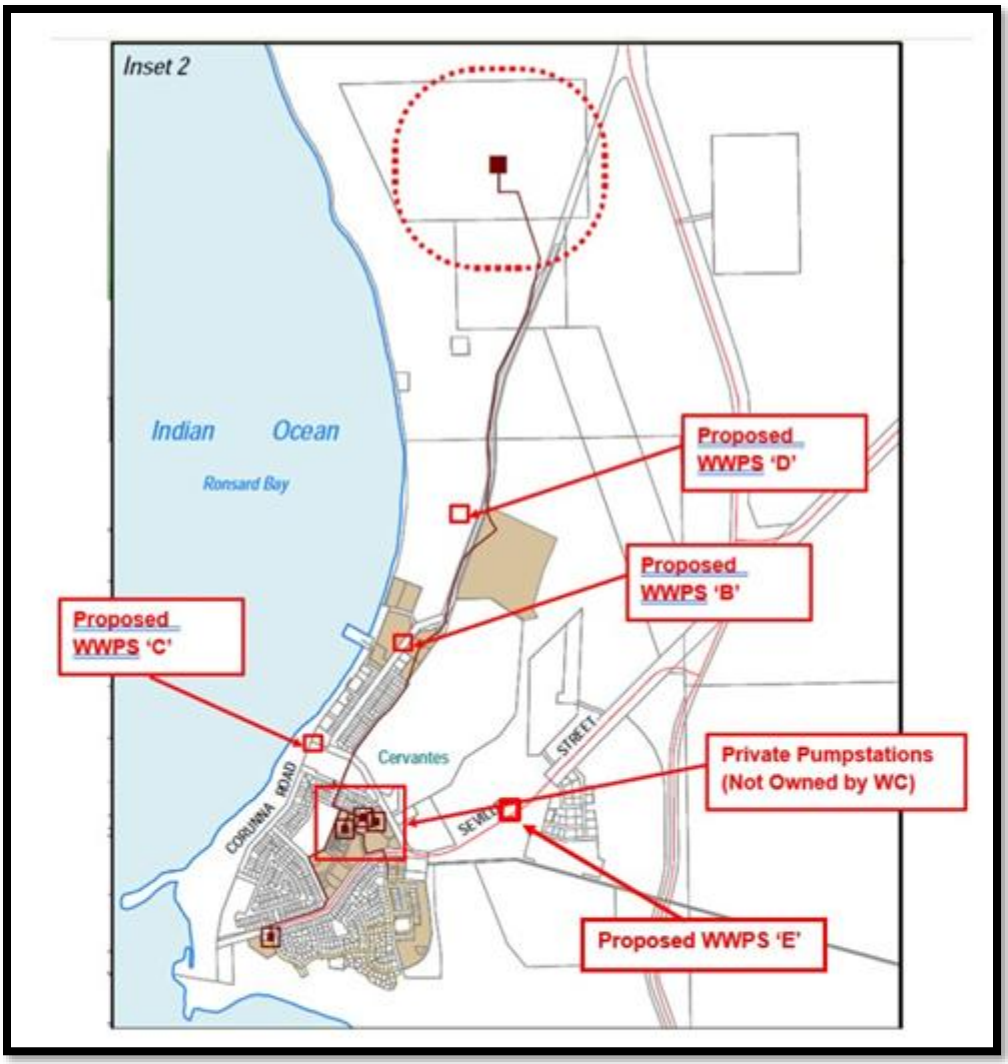
Development WA is a key member of the ILNR Working Group and has indicated its willingness to support the developer-led process with the Water Corporation, including the preparation of a Capital Prioritisation Request on behalf of the Shire.

Figure 7: Updated status of Water Corporation Wastewater Pump station (Jurien Bay)



Cervantes also has three proposed WWPS's however are not proposed to be provided within the Water Corporation 5-year capital works program. The Water Corporation advise that the timing of delivery is unknown.

FIGURE 8: UPDATED STATUS OF WATER CORPORATION PUMP STATION (CERVANTES)



3.2.1.3 Power

Western Power confirms that Coalseam Drive, Jurien Bay is serviced by the Eneabba Substation with remaining capacity of 5 to 10 MVA (2026). However, it is noted that the broader Shire of Dandaragan is supplied through a diverse range of electrical feeders from different zone substations as indicated below:

- Cervantes: ENB 617
- Jurien Bay: ENB 617
- Badgingarra: MOR 613
- Dandaragan: MOR 613
- Cataby: MOR 613

- Regans Ford: RGN 604

The electrical feeders in these areas are voltage constrained and will require further studies to determine capacity and reinforcements for future connection. Western Power acknowledges the Shire of Dandaragan's strategic planning focus for growth, services and facilities, supporting industrial development in appropriate locations. Western Power has advised that it cannot assess electricity capacity or network requirements for the proposed industrial areas at this stage. To enable meaningful investigation, the Shire will need to prepare strategic concept plans identifying the location of intended industrial areas, proposed lot yields, staging, and the type of industries anticipated, as industry type significantly influences electricity demand. These plans should also indicate the proximity of proposed development areas to existing electrical feeders. Western Power recommends that the Shire undertake independent research and obtain professional advice from a registered electrical engineer to support the Industrial Lands Needs Review, with the resulting information provided to Western Power to enable assessment of appropriate electricity capacity and infrastructure requirements.

In the Shires experience, the process outlined poses a barrier to new projects, as proponents are required to fund costly pre-planning activities in addition to high headworks charges.

3.2.1.4 Roads

The Shire is served by two primary distributor roads: Brand Highway and Indian Ocean Drive. Brand Highway is a busy freight route providing the main restricted access vehicle (RAV) route servicing heavy haulage vehicles (RAV 7 link) to the northern regions of the State servicing the freight industry. The Shire also has effective RAV routes on local roads providing east west linkages between the primary distributor roads.

MRWA advice refers to the Indian Ocean drive (IOD) and the associated 'Indian Ocean Planning Guidelines' to provide direction on the use of the road. Heavy vehicle usage of the road is limited with most heavy vehicles travelling from Geraldton to Perth continuing to use the alternate Brand Highway. Heavy vehicles that do use the road are generally associated with the local crayfish, agricultural lime and primary production industries and the delivery of goods to the coastal towns. IOD does not support the heavy through traffic that uses Brand Highway.

Indian Ocean Drive has RAV 4 rated sections and is promoted as a tourist route. The section of the IOD from Shire of Gingin Boundary to Cervantes is predominantly not part of the RAV (Restricted Access Vehicles) or Tandem Drive Network and therefore prevents the IOD being used as a through route for the larger vehicle classes. Main Roads Western Australia (MRWA) considers that suitable locations for industrial areas within the Shire of Dandaragan are east of the Indian Ocean Drive (IOD) and along east–west local government roads that have an existing approved RAV vehicle rating, including areas adjacent to the Ag Lime Routes (lime sand cartage).

The IOD guidelines require that a development near or adjacent to the IOD is to blend with the landscape so as not to be visible. Any industrial development close to the IOD would need to be assessed in accordance with the guidelines.

Main Roads has been engaging with a range of renewable energy proponents regarding the transport requirements associated with large-scale wind energy projects. This includes requirement to upgrades selected parts of the road network (including intersections) to safely accommodate the movement of oversized and over-mass (OSOM) vehicles transporting wind turbine blades and related components.

Longer term MRWA projects include the Indian Ocean Drive future realignment to the east, and Brand Highway Bridge Upgrade across Moore River. These projects are not in Main Roads current 4-year forward estimated construction program and are subject to change without notice.

3.2.1.5 Marine and Harbour

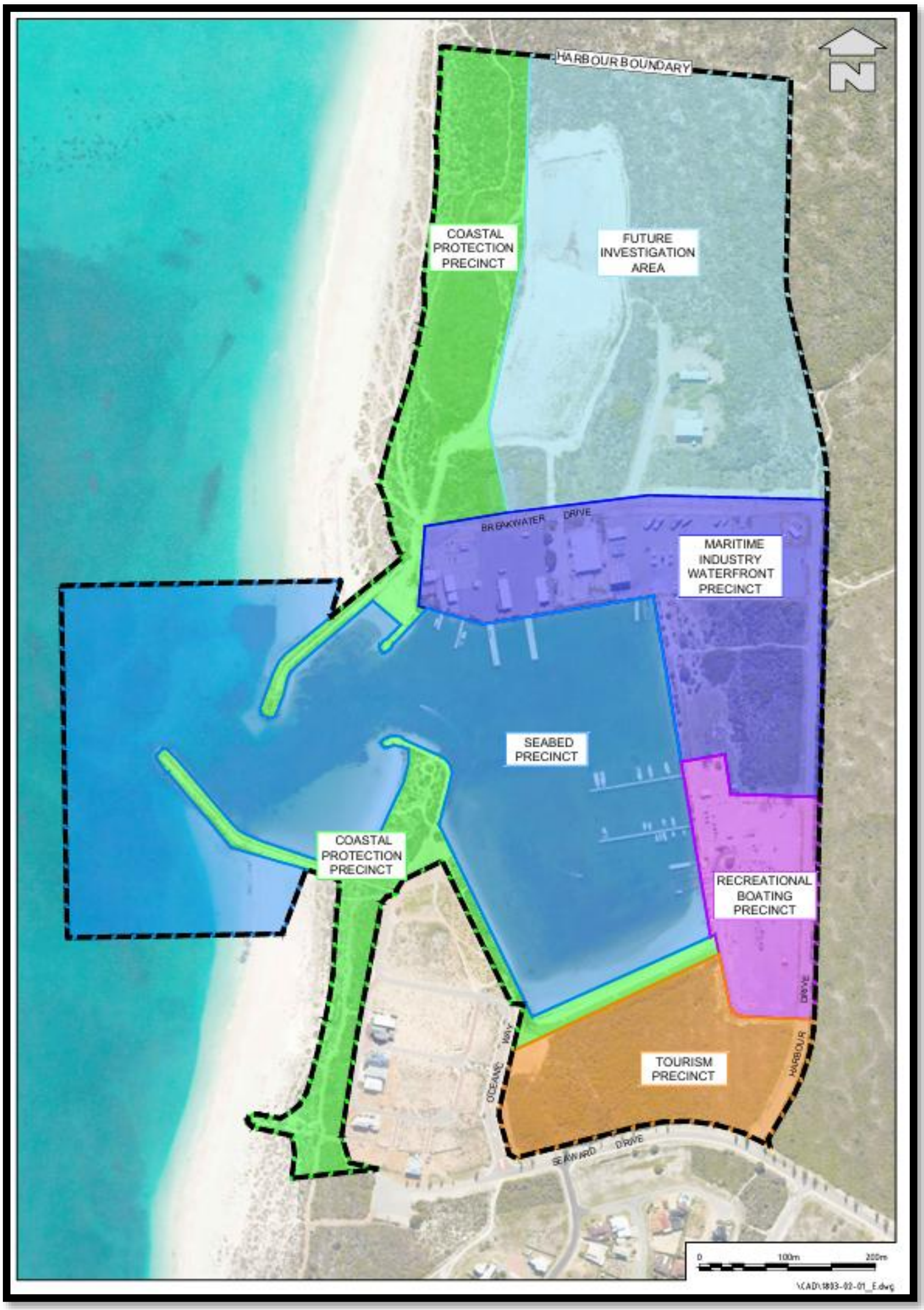
Department of Transport and Major Infrastructure (DTMI) advise that the current industrial uses within the harbour are considered as Maritime related Industrial uses.

The *Jurien Bay Boat Harbour Development Plan 2017* (JBBHDP) is currently under review (See Figure 9). DTMI is unaware of any current or imminent demand for expansion of the existing 'Industrial – Maritime 'uses in the harbour. DTMI is currently progressing planning work to facilitate future tourist-based development in the Tourism Precinct. The undeveloped portions of the Jurien Bay Boat harbour will likely be the subject of future structure planning and preparation of Local Development Plans under the Local Planning Scheme.

Through the JBBHDP review process and subsequent planning processes the use of the undeveloped portions of land in the Maritime Industrial and Tourism Precinct will be considered. The 'Future Investigation Area' precinct will also be subject to future demand/supply analysis in addition to environmental investigations as part of strategic planning for the land area. DTMI anticipate that the future investigations will be a long-term project. Future uses will be expected not to compromise the primary role and function of the Harbour as an operational maritime facility.

Table 5 in section 3.1.2 above, indicates that the boat harbour has a potential second point of access via Samphire Pass and Carmella Street providing direct access to the Carmella Industrial Area and the Coalseam Industrial Area. Existing and proposed maritime industrial uses may have synergies with other designated industrial areas, with potential to accommodate complementary activities within the boat harbour.

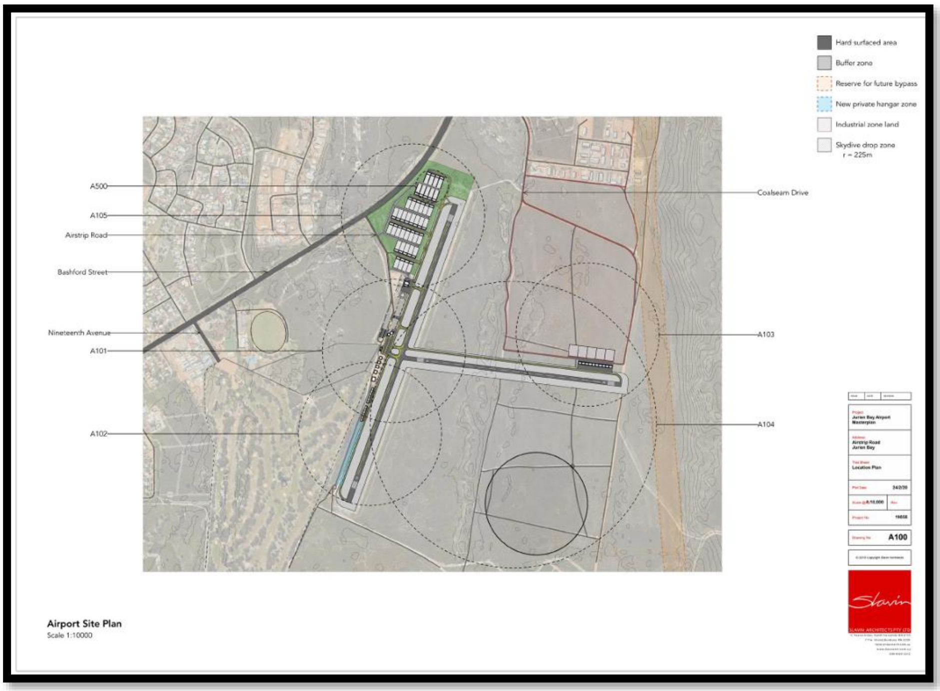
FIGURE 9: JURIEN BAY BOAT HARBOUR DEVELOPMENT PLAN 2017



3.2.1.6 Jurien Bay Airport

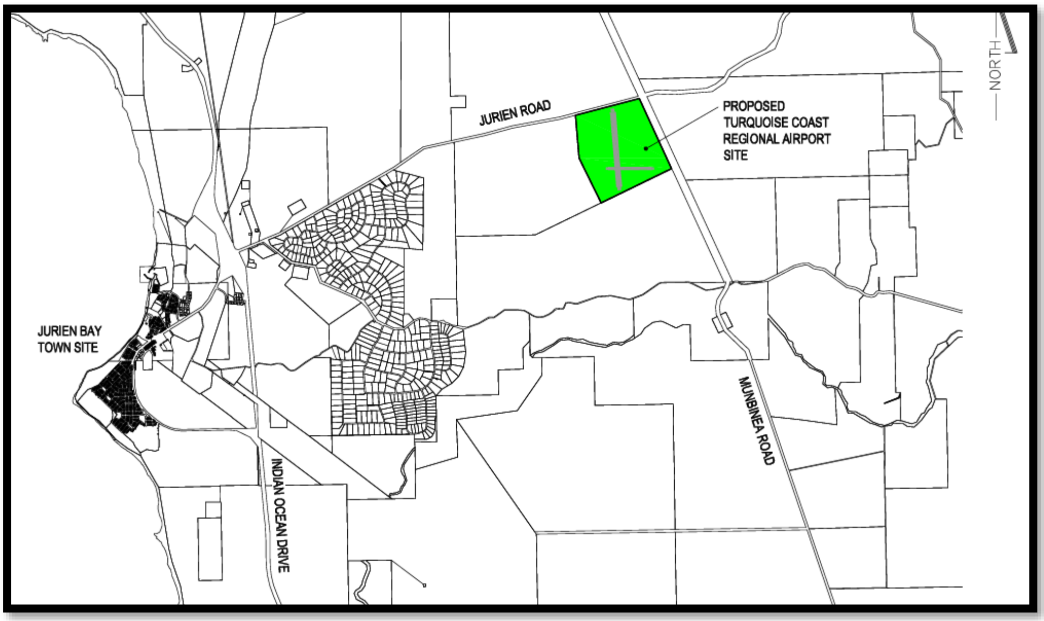
The *2020 Jurien Bay Airport Masterplan* provides a guide to the key infrastructure within the existing airport site which responds to the local environment and stakeholder needs to ensure effective functionality (see Figure 10 below). The master plan guided the development of the east west runway which traverses the Coalseam Industrial Area.

Figure 10: 2020 Jurien Bay Airport Masterplan



Turquoise Coast Regional Airport Master Plan for the Shire of Dandaragan was prepared in 2014 by Rehbein Airport Consulting. The Master Plan included the *Turquoise Coast Airport Site Options Assessment,* to determine the preferred site for the Turquoise Coast Regional Airport. As a result of the Site Options Assessment, the Master Plan recommended relocation of the airport to the easternmost portion of the land located on the corner of Jurien Road and Munbinea Road to the northeast of Jurien Bay.

FIGURE 11: TURQUOISE COAST REGIONAL AIRPORT MASTERPLAN 2014



3.2.2 Environment

DWER advise that under *Section 51C of the Environmental Protection Act 1986*, clearing native vegetation is prohibited unless authorised by a clearing permit, confirmed as *permit-not-required*, or exempt under *Schedule 6 of the EP Act* or the *Environmental Protection (Clearing of Native Vegetation) Regulations 2004*. Exemptions generally apply only to low-impact, routine land management activities outside 'Environmentally Sensitive Areas' (ESAs) and therefore any clearing of vegetation associated with Industrial land development is likely to require a clearing permit.

Department of Water and Environmental Regulation (DWER) advise that the Shire of Dandaragan includes portions of the Swan Coastal Plain (SCP). The SCP is extensively cleared, and any clearing may be considered significant, particularly in areas where less than 30% of remnant vegetation remains. DWER also advises that development areas containing significant environmental values, including 'Threatened Ecological Communities' (TECs), habitat for threatened flora or fauna, and other sensitive or high-value natural areas, should be avoided wherever possible. Based on the likely purpose and extent of clearing associated with the sites under consideration with ESA's and TEC's, (particularly in the Seville industrial Area), DWER indicates that an exemption is unlikely to apply, meaning a clearing permit would be required. Any application must also account for clearing associated with supporting infrastructure such as roads, access, and water supply. DWER also notes that clearing assessments must address potential impacts on flora, fauna, hydrology and other environmental factors.

DWER encourage the Shire to undertake site-specific environmental surveys using qualified consultants to map ecological values and distinguish areas of intact remnant vegetation from more degraded or historically impacted land. This will assist the Shire in prioritising development areas with lower environmental risk and ensuring future industrial planning aligns with legislative requirements and best-practice environmental management.

3.2.3 Crown Land

The Yued Aboriginal Corporation has provided plans identifying land holdings subject to the Indigenous Land Use Agreement (ILUA), which form part of the Southwest Native Title Settlement. These plans reflect Crown land under Yued Aboriginal Corporation control and identify land located within and adjacent to the townsites of Cervantes, Badgingarra and Jurien Bay.

Most of this land is currently reserved under the Shire of Dandaragan Local Planning Scheme No.7 for 'Public Purpose' or 'Parks and Recreation'. As a result, any change to land use or reservation would require consideration of existing land tenure arrangements and would need to proceed through the relevant rezoning and statutory processes under the local planning framework.

The extracts below outline land use suggestions proposed by the Yued Aboriginal Corporation that may be considered in the future, subject to further assessment and planning approvals. The focus is on landholdings adjacent to existing industrial areas and provides context for the discussion in the Tables in section 3.1 identifying potential opportunities for further industrial land investigation.

FIGURE 12: CERVANTES ILUA LAND

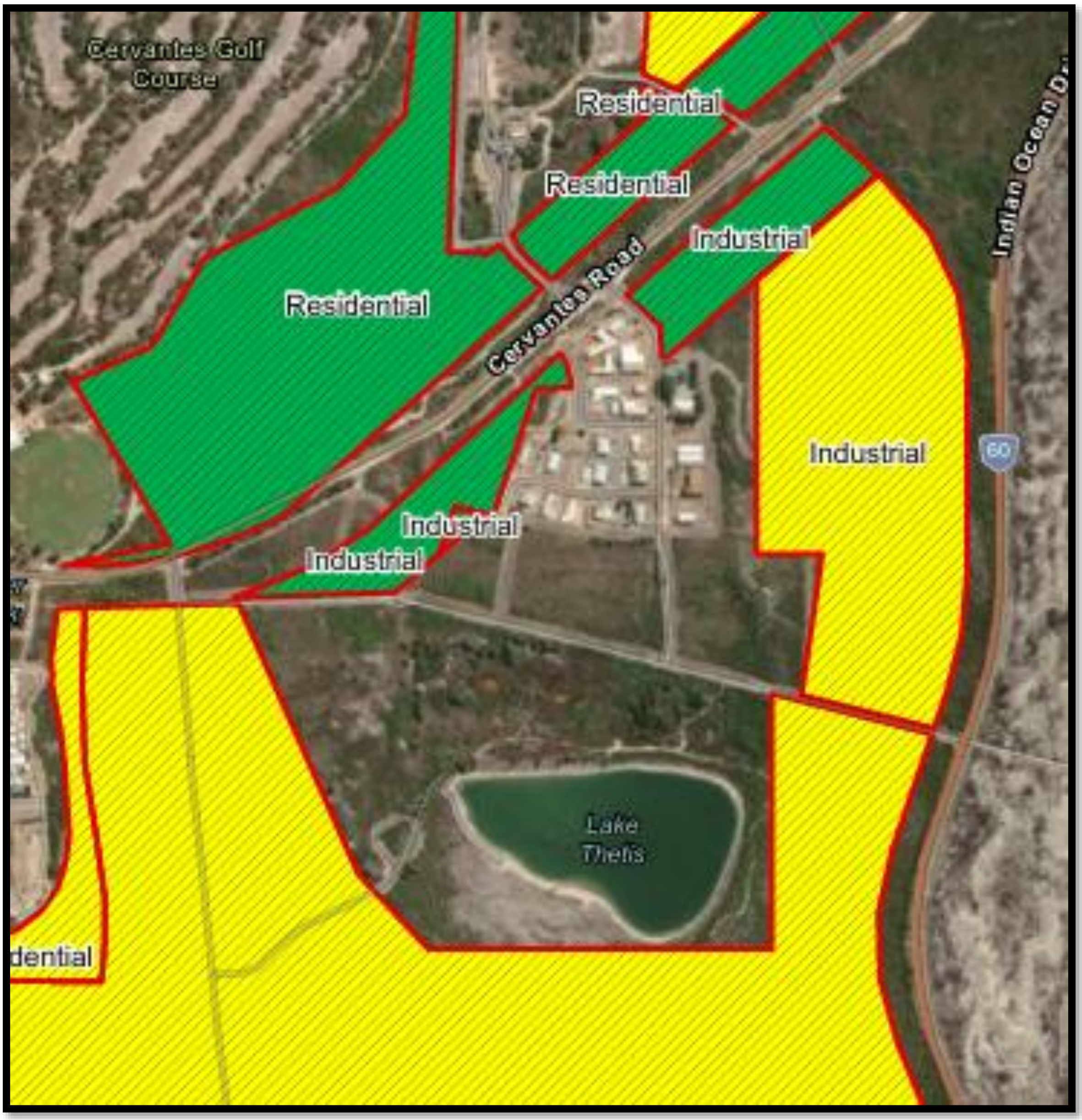


FIGURE 13: JURIEN BAY ILUA LAND

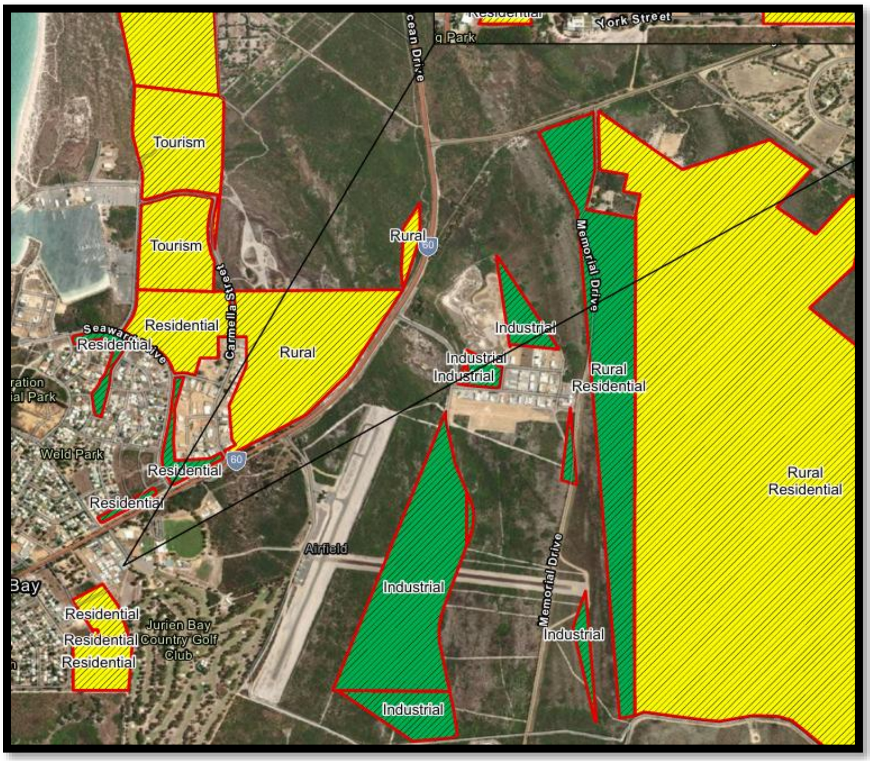
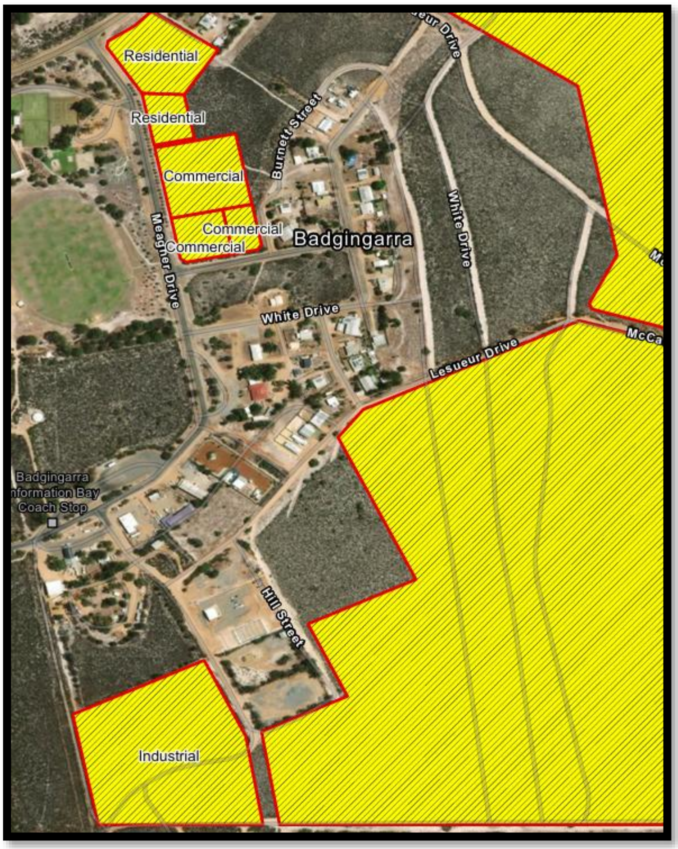


FIGURE 14; BADGINGARRA ILUA LAND



4.0 Industrial Land Needs Analysis

Review of the information in the sections above provides evidence that the Shire of Dandaragan will need to deliver between 32-42 hectares of serviced Industrial land by 2036 (approximately 125-168 lots). This corresponds to the release of 3-4 hectares of serviced industrial land (12 -16 lots) per annum.

Industrial Land Demand

The Econisis report (summarised in Section 2.2 and included in **Appendix C**: **Industrial Land Market Assessment**) forecasts that the Shire of Dandaragan will need to effectively double the supply of serviced and developed industrial land by 2036 to meet projected demand. Econisis identifies demand for an additional 2.4 hectares of occupied industrial land per annum between 2026 and 2036 using the local employment trends scenario. When allowance is made for land required for roads and servicing infrastructure, this equates to approximately 3.12 hectares per annum, or 31.2 hectares of additional serviced industrial land by 2036.

Under the higher growth scenario modelled by Econisis, using Geographia Project led population forecasts, industrial land demand is expected to increase to around 73 hectares. Once roads and other supporting infrastructure are considered, this would require the provision of approximately 42 hectares of additional serviced industrial land.

The high growth scenario based on the current project pipeline shows demand easing back toward the local employment trend over time. However, this decline largely reflects the fact that the existing project pipeline eventually runs out, rather than indicating a drop in underlying demand. The high growth scenario does not assume the development of a new pipeline of future projects, which may be possible. For this reason, the high project led scenario is considered a reasonable representation of high growth potential.

The Econisis Report provides a breakdown of required lot sizes indicating that the majority lots provided would average at 2500m^2 per lot ranging between 1000m^2 and greater than 5000m^2. The Econisis report also reveals subregional level demand for introducing larger lots in the industrial land market for freight, logistics and transport in the Shire of Dandaragan, which is confirmed through the business survey that also reveals that 28% of responding businesses are seeking to expand to larger sites (Refer section 2.1, Figure 3).

FIGURE 15: LOT SIZE DEMAND

Table 3 Allocation of 2.4ha Per Annum Industrial Land Take-up

Lot size band (sqm)	Allocation (%)	Allocated area (sqm)	Representative avg lot size (sqm)	Estimated number of lots
0-1,000	20%	4,800	1,000	4.8
1,000-2,000	20%	4,800	1,500	3.2
2,000-5,000	40%	9,600	2,500	3.8
>5,000	20%	4,800	7,000	0.7
Totals	**100%**	**24,000**	**-**	**12.5**

On the basis of the representative averages used, the 2.4 ha per annum equates to approximately 12.5 lots per year.

Industrial Land Supply Review

The Shire of Dandaragan has approximately 140 ha of industrial zoned land and additional land suitable for light industrial uses at the Jurien Bay Marina. Currently 41 hectares of the zoned land is subdivided, which comprises 127 lots, with only 1.5-2 hectares of unoccupied serviced land. The majority of these lots are located in the Badgingarra townsite.

As discussed in section 3.0, Table 1, there is approximately 98 hectares of undeveloped industrial zoned land, with potential for an additional 24 hectares in the Turquoise Bay Structure Plan area, and potentially some opportunity for maritime related industrial development in the Cervantes Marina and Jurien Bay Boat Harbour.

The findings from Sections 3.1 and 3.2 indicate that approximately 28 hectares of industrial land within the Shire of Dandaragan may be considered accessible for subdivision in the short term, subject to the provision of servicing infrastructure. The balance of the zoned industrial land (approximately 70 hectares) is currently constrained by environmental considerations and/or land-use planning coordination requirements, limiting its ability to be developed in the short term. The findings are summarised as follows:

- The Seville Industrial Area is constrained by environmental values, with approximately 13 hectares of industrial zoned land currently unsuitable for development. Any further investigation within the existing zoned land or on adjoining land would require detailed technical assessments and consultation with relevant State agencies and the Yued Aboriginal Corporation, and outcomes may necessitate amendments to the Local Planning Strategy and Local Planning Scheme to reflect appropriate land use classifications.
- Coalseam is the Shire’s primary industrial growth area and the only precinct with existing sewer servicing, with approximately 87.5 hectares of undeveloped zoned industrial land and limited environmental constraints, allowing opportunity for relatively efficient subdivision. Short- to medium-term lot delivery is dependent on extensions to water, power and sewer services, while longer-term expansion, particularly south of the airport runway, will be influenced by future airport planning and other planning investigations which may be reflected in review of the local planning strategy and local planning scheme. The portion of the site adjacent to the existing infrastructure front and north of the airport runway is approximately 28 hectares.
- The Carmella Industrial Area has no further capacity for industrial expansion within its existing boundaries. Future planning for surrounding Crown land must avoid introducing sensitive uses that could undermine industrial operations within the Carmella Industrial Area. Improvements to Carmella Drive and Samphire Pass may enhance freight efficiency and reduce heavy vehicle movements through residential areas, and connectively with the industrial areas.
- The Jurien Bay Boat Harbour precinct presents a longer-term opportunity for approximately 11.5 hectares of marine-related industrial development, subject to significant constraints including environmental values, coastal and bushfire hazards, and limited servicing

opportunities. Development requires comprehensive technical investigations guided by a structure plan.

- An opportunity exists within the local planning framework to identify 'Rural Enterprise' zones in close proximity to the Dandaragan and Badgingarra townsites. This could help address the current shortage of land available for industrial development, particularly in Dandaragan

The majority of forecast industrial land demand, particularly for smaller and medium-sized lots ranging from 1,000 m^2 to 5,000 m^2, may be accommodated within existing zoned industrial land at Coalseam. Additional capacity may also be provided at Cervantes (subject to outcomes of supporting technical environmental), as well as at Turquoise Bay Structure Plan Area in the longer term. In contrast, demand for larger industrial lots associated with freight, logistics, and transport-related activities is best accommodated in locations with direct access to RAV 7 freight routes, including Brand Highway and appropriately constructed local roads.

Stakeholder engagement identified that 28% of responding businesses are seeking to obtain a larger lot, equating to demand for approximately 13 large sites based on survey responses alone. Based on the assessed lot size requirements, the provision of larger industrial lots to meet this immediate surveyed demand would require approximately 7.3 to 8 hectares of land currently. To ensure sufficient long-term supply and flexibility, it is recommended that a minimum of 20 larger lots, with an average size of approximately 7,000 m^2, be planned for in the short/medium term, requiring a total site area of approximately 18–20 hectares. Identification of a suitably located industrial site of this scale (with potential for expansion in the long term), preferably with direct access to Brand Highway or RAV 7+ routes, would enable staged development, with an initial first stage of approximately 10–13 lots delivered in the medium term.

5.0 Planning for Industrial Development

The Shire of Dandaragan is uniquely positioned within the Wheatbelt to respond to both immediate and ongoing local and subregional industrial land needs. This position is underpinned by the Shire's access to strategic transport corridors, proximity to energy infrastructure, and alignment with State objectives for renewable energy development, freight efficiency, and industrial diversification. As identified in this report, there is a clear and emerging demand for both small-to-medium industrial lots and larger format sites suitable for freight, logistics, and transport-related uses, particularly those requiring access to RAV 7 freight routes such as Brand Highway.

While elements of this demand can be met within existing and potential future industrial areas, including Coalseam, and Turquoise Bay, the analysis highlights the need for a more coordinated and proactive approach to identifying, planning, and servicing industrial land particularly within or adjacent to Jurien Bay. This aligns with the intent of the Local Planning Strategy, which seeks to provide for industrial growth while ensuring appropriate separation from sensitive land uses. Progressing industrial land supply requires parallel actions relating to environmental assessment, infrastructure investigations, servicing strategies, funding advocacy, and the ongoing review of local planning frameworks.

The ILNR process has been instrumental in securing the active involvement of Development WA, which has stepped into a leadership role and confirmed a willingness to manage proponent-led infrastructure planning and associated Capital Prioritisation Requests with the Water Corporation. Development WA has also committed to lead funding applications to State Treasury for Industrial land development within the Shire and, where feasible, support RDAP applications to facilitate incremental lot release.

Table 8: Strategic Direction and Actions below translate the findings of this report into objectives, actions, responsibilities, and timeframes. It provides a practical roadmap to support economic growth, respond to market demand, and position the Shire to capitalise on both known and emerging industrial opportunities in the short, medium and long term. The table is structured around four core objectives that collectively support investment readiness, and the ongoing provision of industrial land. Together, these objectives and associated actions aim to:

- **Forecast and monitor the demand and supply of industrial land** to ensure decisions are informed by up-to-date evidence and future growth trends.
- **Activate and maintain a continuous supply of industrial land** that is appropriately located, serviced, and development-ready to facilitate local and regional employment, business expansion, and new investment.
- **Coordinate land use planning and land assembly** to unlock industrial development opportunities by aligning zoning, infrastructure provision, site investigations, and staging to reduce barriers to development and support efficient land delivery.
- **Support economic development, investment attraction, and funding advocacy** by progressing priority industrial sites, preparing funding submissions, and working with State agencies to deliver enabling infrastructure that improves market confidence and competitiveness.

Water corporation advise that to effectively implement actions relating to water supply and wastewater infrastructure is likely to require considerable resource and input from the Water Corporation Asset Investment Planning (AIP) team. While the Water Corporation encourages collaboration with Local Authorities and endeavours to support future development, they advise that a mutual understanding of agreed timelines would need to be developed for any actions to be implemented.

Table 8: Strategic Directions and Actions			
Strategic Direction	Action	Stakeholders	Timeframe
Objective 1: Forecast and monitor the demand and supply of industrial land			
Develop and maintain a program to forecast and monitor the demand and supply of industrial land.	1. Collate information on the known approved and projected/ forecast projects annually.	Shire of Dandaragan (SoD)	Ongoing
	2. Provide a desktop update of the industrial land supply audit every five years.	SoD	2031
Objective 2: Activate and maintain a continuous supply of industrial land to facilitate local and regional employment.			
Retain Industrial zoned land and protect existing industrial land to sustain long term industrial activity	3. Encourage the consolidation of existing industrial zoned areas i.e. promote efficient utilisation of buildings and serviced land.	SoD DPLH	Ongoing
	4. Restrict the introduction of sensitive uses adjacent to existing industrial zoned land.	SoD DPLH	
Identify and maintain a project ready land bank (10 -15 years) to ensure regular industrial land supply.	5. Collaborate with infrastructure and service providers to identify appropriate mechanisms to facilitate strategic land banking for future industrial uses that support a range of lot sizes.	SoD Dev WA WDC Water Corporation DWER Western Power DPLH	
	6. Prepare to release 32 – 42 hectares of serviced industrial land ready for occupation by 2036.		
	7. Identify a staged land release process to focus on creating of 3-4 hectares (12-16 lots) of industrial land per year from 2026 -2036.		

<table>
<tr><th colspan="4">Objective 3: Coordinate land-use planning and land assembly to unlock industrial development opportunities</th></tr>
<tr><td>Identify an Industrial Area capable of serving a subregional function to accommodate large lot configuration supporting freight, logistics, and emerging State priorities for industrial diversification.</td><td>8. Undertake a site selection study to nominate potential site(s) with a focus on the following:
Centrally located to support activities in the sub-region
Access to RAV7 roads.
Power Supply
Water supply
Separation from sensitive land use and environmentally significant areas
Minimum 15–20-hectare site with opportunity to expand. Stage one to include minimum 8-10ha of large lots ranging from 7000m2 – 1ha.
Consider opportunities in locations with access to Major highways (i.e. Dandaragan, Regans Ford, Cataby) and where worker housing is provided and can be provided.</td><td>SoD
Adjacent Local Government agencies
MRWA
Dev WA
WDC
Water corporation
Yued Aboriginal Corporation (YAC)</td><td>Short term priority (1-2 years)</td></tr>
<tr><td rowspan="2">Investigate opportunities to develop the General Industrial zone within and adjacent to the Seville Industrial Estate (Cervantes). Seville</td><td>9. Undertake site-specific environmental surveys, in consultation with DWER, to map ecological values (including ESA's and TEC's) and identify areas of lower environmental risk that may accommodate development within the existing industrial zoned land.</td><td rowspan="2">SoD
DWER
DBCA</td><td rowspan="2">Short Term priority

(1 year)
Short Term</td></tr>
<tr><td>10. Address interface and management considerations relating to the adjacent Lake Thetis conservation area.</td></tr>
</table>

	11. Undertake site-specific environmental surveys for Lot 1117 Indian Ocean Drive to identify areas of lower environmental risk as an initial assessment of its suitability for future development.	YAC SoD DWER DPLH MRWA	Short/Medium term Priority (1-5 years)
	12. Undertake water management and servicing investigations to determine suitability for potential development areas. Enquire with the Water Corporation about extent of capacity for expansion of reticulated water system for the Seville Industrial Area.		
	13. Update the Local Planning Strategy with recommendations for land-use changes that balance industrial land supply needs with identified conservation values.		
	14. Prepare Capital Prioritisation Request for the provision of a WWPS if identified as suitable and needed for future subdivision within or adjacent to the Seville Industrial Area.	SoD Dev WA Water corporation	
Strengthen Jurien Bay's role as the subregional industrial centre by planning for a sustained supply of industrial land accommodating a variety	15. Prioritise release of lots contiguous to the development in the Coalseam Industrial Area north of the east – west airport runway. Servicing solutions to enable a range of lots sizes.	SoD Dev WA Water corporation	Short Term Priority (2026)

of lot sizes, supported by coordinated environmental, infrastructure and land-use investigations.	16. Prepare a Capital Prioritisation Request for the provision of the WWPS required to connect Coal seam Industrial Area to the wastewater system and enable expansion. See actions 32-28.	SoD Dev WA Water corporation	
	17. Request DPLH transfer of Crown Land to Development WA to streamline development and approvals processes.	SoD Dev WA DPLH	Short Term Priority (2026)
	18. Undertake planning investigations for the area including the Jurien Bay Airport ('Public Purpose – Landing Ground' Reserve), the Coalseam Industrial-zoned land, and the adjacent 'Parks & Recreation' Reserve (Yued Aboriginal Corporation) to determine the highest and best land-use outcomes for the locality. Technical investigations (ie environmental, heritage, stormwater, traffic, servicing etc) may inform amendments to the local planning scheme and subdivision designs. The investigations should consider: • The Shire of Dandaragan ***2020 Airport Masterplan***, with particular focus on recommendations relating to industrial development.	SoD DPLH Dev WA WDC Water Corporation YAC	Short Term priority (2026)

	• Review of Airport studies addressing the potential to relocate the airport • Current and future airport operational constraints, including flight paths, safety zones, noise influence areas, emergency aviation needs, and any ancillary infrastructure that may encroach upon industrial-zoned land. • Opportunities for aviation-aligned and compatible industrial uses within the Airport. • Engagement with the Yued Aboriginal Corporation to understand values, constraints, and land-use expectations within the Parks & Recreation Reserve to ensure compatibility at the airport/industrial zone interface. • The future development and timing for the Indian Ocean Drive bypass alignment, and its implications for access, movement networks, and long-term land-use function. • Servicing capacity, including utilities, access, drainage, and infrastructure requirements to support future development. • Review heritage, environmental and water quality. • Surrounding land use compatibility		
	19. Investigate the option to align the industrial zone with lot boundaries in the Coal seam	SoD YAC	

	industrial area where portion of the lots is reserved for parks and recreation. (See action 18 above)	Dev WA DPLH	
	20. Collaborate with landowners to investigate the feasibility and land-use implications of upgrading Carmella Drive and Samphire Road, with the aim of strengthening connections between the Carmella Industrial Area and the Jurien Bay Boat Harbour.	SoD, MRWA, DevWa landowners	Medium Term 2-5 years
	21. Collaborate with landowners to consider the highest and best use of land parcels adjacent to the Carmella Industrial Area and the undeveloped portions of the Jurien Bay Boat Harbour, including assessing compatibility with surrounding sensitive land uses. Review to inform the Local Planning Framework (i.e. Local Planning Strategy and Local Planning Scheme).	SoD YAC DPLH	Medium Term 2-5 years
	22. Liaise with DPLH and YAC regarding the opportunity to expand the Shire of Dandaragan works depot in the Carmella Industrial Area.	SoD YAC Water Corporation	
Investigate opportunities to support light industrial land use, in proximity to the Dandaragan and Badgingarra townsites	23. Undertake site selection studies within the 'Investigation Areas' adjacent to the Badgingarra and Dandaragan townsites identified in the Local Planning Strategy, to determine the preferred location for the 'Rural Enterprise' zone, with emphasis on the following:	SoD DWER DPIRD Western Power Water Corporation	Short term priority (1-2 years)

and to establish 'Rural Enterprise' zones,	• Areas to avoid due to environmental or agricultural significance. • Provision of road access capable of accommodating heavy vehicles and providing sufficient exposure for the businesses on site; • Power and water supply and telecommunications capacity and requirements.		
	24. Based on the outcomes of the site selection studies, collaborate with landowners within suitable areas adjacent to Badgingarra and Dandaragan townsites to consider the feasibility and planning requirements associated with rezoning land to 'Rural Enterprise.'	SoD Landowners YAC DPLH	Medium Term (2-5 years)
	24. Activate opportunities for industrial development in the Badgingarra Industrial area through servicing and land development.	SoD Dev WA WDC Water Corporation	Ongoing
Accommodate workforce	25. Prepare a housing strategy that includes identifying suitable locations and housing typologies to accommodate workforce demand associated with industrial expansion.	SoD	Short term priority (2026)
Objective 4: Economic Development, Attract Investors and Grant Funding			
Attract funding to service and release priority Industrial land	26. Support Development WA in the preparation of funding submissions for State Government funding streams.	Dev WA SoD	Ongoing

	27. Prepare applications for extension of services and subdivision development through the Regional Development Assistance Program (RDAP) for short- and medium-term industrial expansion areas.	SoD Dev WA WDC Water Corporation, Western Power	Short term (2026), then ongoing
	28. Seek RDAP support to enable subdivision of lots at Coalseam Industrial Area ongoing at a rate of between 12 -16 lots per annum.		2026
	29. Seek RDAP support to assist potential short term land release at Seville Road Industrial Area (Cervantes).		2026
	30. Build a proactive grants pipeline. Establish a grants calendar and monitoring process using WA's Grants Assistance & Programs Register.	SoD	Start 2026, review monthly
	31. Prepare and maintain grant-ready business cases for priority industrial sites.	SoD Development WA, WDC	
Coordinate infrastructure-related funding and delivery	32. Submit evidence of industrial land demand informed by the Shire of Dandaragan Industrial Land Needs Review, Growth Plan and WDC advice to DPLH to the Water Corporation to support capital planning priorities.	Water Corporation SoD Dev WA	2026
	33. Engage with the Water Corporation to determine opportunities within its works program that could support timely industrial development (e.g., headworks, upgrades, extensions). Seek to align headworks and upgrades with industrial Area staging.	SoD Dev WA Water Corporation	2026 and ongoing 2026

	34. Request Water Corporation to provide estimated capacity for the proposed 2027 water source and bore to confirm potential availability for industrial subdivision. Shire to provide details of current residential, industrial, tourism projects, estimated dwelling/lot numbers and realistic timing and staging to support Water Corporation assessment.		
	35. Investigate short-term low lot yield lot opportunities within current capacity. Liaise with Water Corporation to identify whether any industrial lots can be serviced via reticulation extensions only. Provide plans to Water Corp for assessment.		
	36. Engage with Water Corporation to escalate to the provision of 'Wastewater Pump Station D' to enable subdivision at Coalseam in the short term. Development WA to explore feasibility of Short-term lot release at Coalseam industrial Area and Proponent-led delivery of sewer pump station WWPS D. Submit an application for a Capital Prioritisation Request for the WWPS D.		
	37. Identify co-funding or program windows in the Water Corporation Works Program.	Dev WA SoD	2026 - ongoing
	38. Obtain professional advice from a registered electrical engineer to support the Industrial Lands Needs Review, to enable assessment of appropriate electricity capacity and infrastructure requirements.	SoD Western Power	As required

	with the resulting information provided to Western Power.		
Investigate alternative servicing solutions	39. Undertake studies into alternative servicing options (e.g., modular servicing, decentralised wastewater, renewable energy micro grids) to reduce upfront infrastructure costs and accelerate land readiness.	SoD Department of Health Water Corporation WDC DPLH	Ongoing
Establish mechanisms for coordinated land release	40. Form a Land Release Working Group to coordinate land supply planning, infrastructure staging, and investment attraction. The Land Release Working Group to coordinate grant bids, land assembly, approvals sequencing, and infrastructure staging.	SoD (chair) Dev WA DPLH WDC Water Corporation. Western Power Dev WA	Initiate 2026, meet quarterly
Build partnerships with industry	41. Develop partnership models with industry to support land development, shared infrastructure, investment attraction and co-funded servicing solutions.	SoD	Ongoing
	42. Support Aboriginal Economic Development & Partnerships. Partner with Yued Aboriginal Corporation and other Aboriginal partners and access relevant DPIRD/NIAA grant streams for potential land development process.	SoD YAC DPIRD NIAA	Ongoing

Appendix A: Literature Review

Appendix A: Shire of Dandaragan ILNR Literature Review

Draft Shire of Dandaragan Growth Plan – 2026

The Growth Plan outlines a clear vision for the Shire of Dandaragan to become a fully serviced, well-connected regional growth hub that supports Western Australia's population growth, renewable energy transition and economic diversification. It emphasises the need for coordinated land-use planning and infrastructure investment to unlock growth while protecting environmental and coastal assets. Through collaboration between the Shire, State agencies and the private sector, the Plan seeks to deliver sustainable, long-term economic and community outcomes.

The Growth Plan incorporates some of the preliminary findings of the ILNR and associated outcomes and confirms that the Shire of Dandaragan is increasingly important to Western Australia's coastal and renewable energy growth corridor. Its location, transport access and proximity to major energy and infrastructure projects are driving increased demand for industrial land to support construction activity, logistics, servicing, storage and long-term operations.

The report recommends a proactive approach to identifying, servicing and activating priority industrial land, supported by updates to the local planning framework and the preparation of funding-ready infrastructure proposals. These actions are critical to supporting economic diversification, job creation and long-term growth within the Shire.

Shire of Dandaragan Local Planning Strategy 2020

The Local Planning Strategy identifies Key areas for future industrial development in Jurien Bay, Cervantes, Dandaragan, and Badgingarra, with planning focused on minimizing land use conflicts and ensuring compliance with State Planning Policy 4.1. The LPS outlines key opportunities for industrial development at the following locations:

- Coalseam Road Industrial Area: There is 90 hectares of undeveloped Industrial zoned land at the Coalseam Road industrial area. Development beyond the current stage, however, is subject to environmental, infrastructure and native title assessments.
- Jurien Bay Boat Harbour: Underutilized asset with potential for marine-based industry, tourism, and recreation.
- The Turquoise Coast structure plan contains an industrial component. Structure planning has identified an indicative yield of 43 industry and light industry lots on land zoned (25 industrial and 18 light industrial lots).
- Special Development Cervantes has limited short-term demand; long-term potential north of town.
- Identified investigation areas in Badgingarra and Dandaragan may incorporate some industrial land should demand be identified. Badgingarra presents a strategic location along Brand Highway for light to general industrial uses supporting transport and rural enterprises. Dandaragan future expansion may include flexible mixed-use industry.

Appendix A: Shire of Dandaragan ILNR Literature Review

Strategic Industrial Lands Activation Plan (2025)

In November 2025 the WA State Government through the Department of Energy and Economic Diversification released the *Strategic Industrial Lands Activation Plan* which highlights that fast tracking clean energy and major industrial projects is a key priority for the WA Government, with a focus on investing to unlock Strategic Industrial Areas (SIA's) and drive economic growth to diversity and decarbonize the economy.

Western Australia's SIAs are designed for use by strategic and heavy industries that generate large investment, employment and value of productions and have been selected for proximity to large resource projects and key enabling infrastructure are and positioned to enable key strategic industries including:

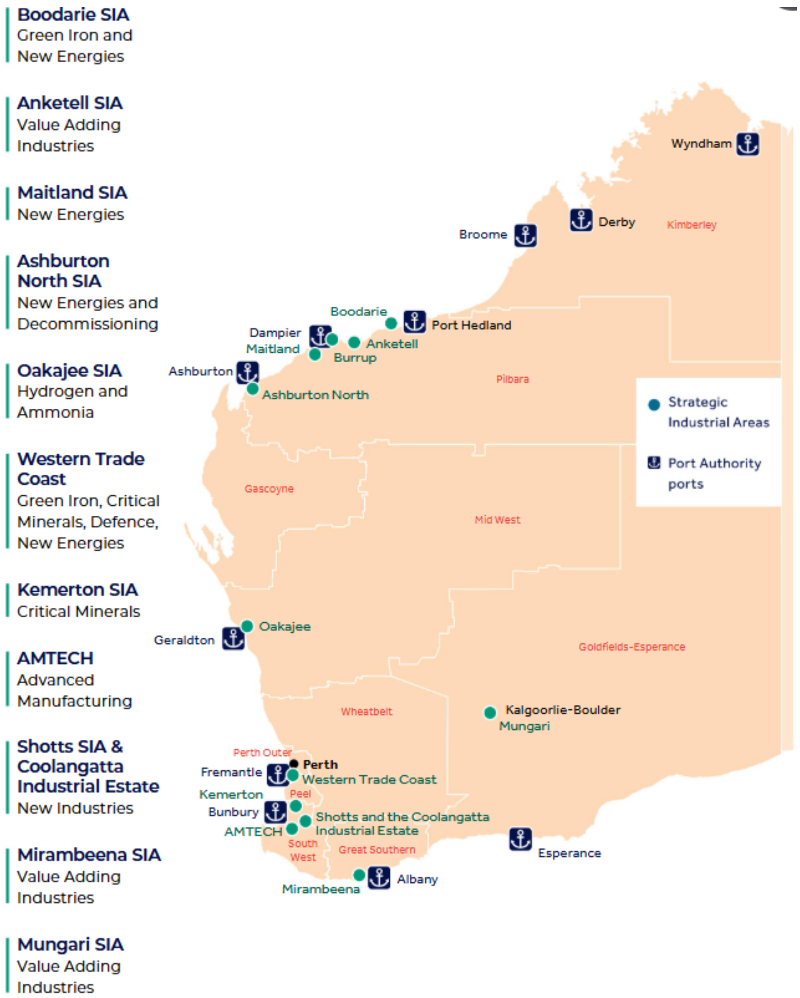
- Renewable hydrogen and ammonia
- Biofuels production
- Green iron and metals processing
- Critical minerals processing
- Shipbuilding and sustainment
- Advanced manufacturing.

The SIF 2024/25 budget focuses on activation of Strategic Industrial Areas through the assembly of industrial land and the provision of enabling infrastructure. The SIF recognises that developing SIA's and activity investment ready industrial land will require a significant and sustained investment of a number of years. The critical enablers for activation is recognized to include:

- Site works
- Energy infrastructure
- Planning and land assembly
- Transport infrastructure
- Water infrastructure

The Strategic Industrial Areas (SIAs) across Western Australia play a distinct role in driving economic impact. These include the Perth, Peel, Pilbara, Mid-West, Goldfields-Esperance, Great Southern, and Southwest regions.

Appendix A: Shire of Dandaragan ILNR Literature Review



Economic and Employment Lands Strategy (EELS) 2012

EELS was prepared to ensure adequate forward planning for general and light industrial land (non-heavy industry) in Perth and Peel over the next 20 years with the key goals to:

- Identify suitable areas for non-heavy industrial activity.
- Maintain a rolling 20-year industrial land bank to avoid shortages.
- Protect existing industrial land from competing uses (e.g., residential).
- Improve governance and coordination between State, local government, and private sector.
- Facilitate timely delivery of development-ready land and infrastructure.

Demand for heavy industrial land is derived from a different set of drivers to that of general and light industrial land, being more project dependant than other industrial land uses, therefore it has been excluded from consideration in the EELS. A finding from the study recognised that there is increasingly a move away from manufacturing operations towards transportation logistics and storage, warehousing and distribution centres. This emerging trend has resulted in an increased demand for larger lot sizes and the development of estates that can respond to and capably accommodate these larger scale uses.

Appendix A: Shire of Dandaragan ILNR Literature Review

10 Year Industrial Land Strategy June 2021 – (Industrial Land Steering Committee – Development WA

The Strategy has been developed with aim of providing recommendations on the priority infrastructure required to unlock industrial land across Western Australia over the next decade. The Strategy covers all types of industrial land — Strategic Industrial Areas (SIAs), General Industrial Areas (GIAs), and Technology Parks.

SIAs: industrial land areas designed for investment in downstream processing and other strategic industrial activities. SIAs are strategically selected for their proximity to major resource projects and key infrastructure such as roads, rail and ports. They provide project-ready land with sufficient planning, environmental and infrastructure coordination to enable project certainty for industrial proponents.

GIAs: provide for a broad range of industrial, service and storage activities and are generally sold to private proponents. An adequate supply of appropriately serviced GIAs is crucial in enabling continued economic growth. GIAs play an integral role in regional economies, as many of the State's large resource projects require supporting services usually located in GIAs.

The Strategy recommends the following in respect to Regional WA:

- Support the development of enabling physical infrastructure in regional WA to facilitate the establishment of new industries. The key issue for regional WA is on the demand side and, as a result, many regional communities are seeking to attract new industries to diversify their economies. To assist this, it is critical enabling infrastructure, such as sufficient power, water and communications, are in place to support new projects. One example is the renewable energy sector, which is seeking to establish new projects across regional WA, with several potential projects under consideration, including in solar, hydrogen and wind. These projects are expected to drive demand for industrial land but require the right enabling infrastructure.

- Continue the Regional Development Assistance Program's work, especially in the Wheatbelt, to facilitate serviced light industrial land. Small to medium enterprises play a critical role in the economies of smaller regional towns and an adequate supply of serviced light industrial land is required to ensure these businesses are sustained and have opportunities for growth. Due to low land values and the high cost of connecting and upgrading services, including power and water to greenfield sites, development by the private sector is often not viable. Through the Regional Development Assistance Program (RDAP), Development WA has worked with local governments to provide serviced light industrial land across regions' towns. The RDAP program is seen as critical in maintaining the longer-term supply of light industrial land, especially in the Wheatbelt, and should be continued.

Table 1 below provides a summary of the Industry Typology (SIA's and GIA's) and location criteria.

Appendix A: Shire of Dandaragan ILNR Literature Review

Table 1: Industrial Land Types

INDUSTRIAL TYPOLOGIES AND LOCATION CRITERIA		
INDUSTRY TYPOLOGY	**ACTIVITY**	**LOCATION CRITERIA**
1. STRATEGIC INDUSTRIAL AREAS	• Industrial activities of significant economic and strategic importance to the State • Strategic, value-adding activities such as downstream resource processing that represent new segments of key industrial value chains. • Industries likely to have off-site impacts such as major hazard risk, light, noise, odour or emissions • These industries generate significant investment and employment	• Large land areas required • On major transmission (electricity and gas) infrastructure networks • Road access by heavy vehicles • Direct port connection – via road or rail • Close to major population centre to source employees and ancillary general industrial needs • Sufficient separation distances between sensitive uses, such as residential, and industry through an established buffer
2. GENERAL INDUSTRIAL - DISTRICT ESTATES AND SPECIAL USE SITES OF LOCAL SIGNIFICANCE. ESTATES WITH SMALL TO MODERATE SIZED INDUSTRIES.	• Consumer and business orientation • Provide goods and services to regional, state and international markets • Not hazardous or offensive • Can include business parks, offices, local services, fabrication and manufacturing • Limited bulky goods showroom	• Access to key freight routes, including Over Size over Mass network as well as the freight rail network • Potable and processing water, sewer/land for waste water disposal, electricity, other energy (food and metal processing are heavy water users and may require associated recycling facilities) • Large, skilled workforce catchment • Moderate to large, relatively flat sites – any processing is land intensive • Potential for large amounts of onsite storage

Add in the other extract of warehousing and transport and logistics from page 9 of the report. – snip wasn't working at the time

The 10-year industrial strategy highlights that the Wheatbelt relies heavily on small to medium enterprises for economic activity, yet their growth is constrained by limited availability of serviced light and general industrial land. Due to low land values and the high cost of extending essential services such as power and water to greenfield sites, private sector development is generally not viable. To address this, Development WA—through the Regional Development Assistance Program (RDAP)—partners with local governments to deliver serviced light industrial land in regional townsites, helping overcome prohibitive development costs and alleviating shortages where privately developed land is limited or unavailable. The strategy also notes that there are currently **no Strategic Industrial Areas** within the Wheatbelt.

2026 Integrated System Plan (ISP)

AEMO's Integrated System Plan (ISP) is a roadmap for the transition of the National Electricity Market (NEM) power system, with a clear plan for essential infrastructure that will meet future energy needs. The ISP's optimal development path (ODP) sets out the needed generation, storage and network investments to transition to net zero by 2050 through current policy settings and deliver significant net market benefits for consumers.

The Draft 2026 ISP reaffirms that renewable energy, connected by transmission and distribution, firmed with storage and backed up by gas presents the least-cost way to supply secure and reliable electricity to consumers as coal plants retire, while meeting government policies through to 2050.

Appendix B: Industry Business Survey Outcomes

Contents

Executive Summary

The Shire of Dandaragan conducted a survey with industry businesses, landowners, and state government agencies (September–November 2025) to assess current and future industrial land requirements. The survey received 49 responses, representing approximately 30% of industry groups and associated businesses in the subregion

Key Findings:

- The majority of respondents were business owners/managers (82%), primarily operating in Agriculture, Forestry & Fishing, Construction, and Transport/Warehousing sectors. Most responding business are long-established (10+ years), small to medium-sized, and concentrated around Jurien Bay.
- Forty six percent of responding businesses plan to expand within 5–10 years, with significant demand for sites between 1,000–10,000 m^2, particularly from agriculture, construction, and mining sectors.
- Businesses rate the Shire as moderately competitive (3.56/5) and well-connected to markets (3.52/5). Economic resilience scored positively (3.47), but infrastructure (2.96) and internet connectivity (2.65) were identified as weaknesses.
- Jurien Bay is the preferred for future industrial development, followed by Badgingarra and Dandaragan.
- Major challenges for growth were identified to include employee housing shortages, limited industrial land availability, inadequate infrastructure (power, water, sewer), and poor telecommunications.
- Tourism, renewable energy, agricultural innovation, and population growth were cited as potential drivers for growth, contingent on infrastructure and housing investment.
- Affordable and serviced industrial land, improved housing, infrastructure upgrades, and incentives are critical for competitiveness and to support business needs.

1.0 Stakeholder Engagement Objectives

Objectives of the Stakeholder Engagement Communication Framework in preparation of the Shire of Dandaragan Industrial Land Needs Review are to:

- Ensure stakeholders understand their level of participation in this project, as outlined by the IAP2 framework (see Table 1).
- Identify, inform, and consult with stakeholders throughout the Industrial Land Needs Review process.
- Clearly communicate both the limitations and possibilities of the project process.
- Set clear expectations for the roles of internal stakeholders in preparing the document.
- Build community awareness of the project, including how local values and issues have been incorporated.
- Provide a framework that builds community and stakeholder confidence in the resulting document.
- Prevent misinformation and speculation by delivering clear, consistent messages about the Industrial Land Needs Review process and recommendations.
- Respect the time and resources for Stakeholders involvement and request for feedback through the process.
- Effectively engage with relevant stakeholders to collect qualitative data to support and expand on findings from quantitative data. Conduct targeted engagement with:
    - Development WA, RDAP, WDC
    - Local real estate agents, valuers, and industrial landowners
    - Major Project Proponents
    - Renewable energy proponents, agribusinesses, and logistics operators
- Document and collate stakeholder feedback to inform recommendations and study outcomes.

2.0 Stakeholder Engagement Activities

Primary research informs the Industrial Land Needs review through the following community and stakeholder engagement processes:

- Industry, Business and Landowners Survey
- Technical working group
- Liaison with State Agency/Service Agency Stakeholders

Table 1 below identifies the stakeholder groups involved in the project, their level of engagement, and the terms of reference that support the engagement activities and outcomes.

Table 1: Stakeholder Groups

	1AP2 Level of Engagement (Table 1)	Communication Methods/Terms of Reference
Decision Makers/Report Endorsement • Shire of Dandaragan Executive • Shire of Dandaragan Council	Empower	- Council Briefings/Meetings - Confirm recommendations/Actions - Report Endorsement

Shire of Dandaragan Internal Project Team
• Manager Planning and Building services
• Strategic Planning Coordinator
• Shire of Dandaragan officers:
  - Development services
  - Infrastructure services
  - Corporate services
	Collaborate	- Provide data, local knowledge and other technical information.
		- Provide information and direction for the engagement activities
		- Feedback on draft reports
		- Emails/Phone calls/Team meetings as required.

ILNR Technical Working Group • Shire of Dandaragan officers • Shire appointed Consultant • Wheatbelt Development Commission • Development WA • Department Planning Lands and Heritage	Collaborate	- Information sharing relating to respective department projects - Support in mapping, data, and Infrastructure information - Emails/ and phone calls - Teams Meeting - Document Review
State Agency/ Service Agency Stakeholders • Department of Water Environment and Regulation (DWER) • Water Corporation • Western Power • Department of Transport and Major Infrastructure (DOT) • DPLH • Department of Primary Industries and Regional Development (DPIRD) • Department of Energy and Economic Diversification (DEED)	Inform Consult	- Building awareness - Gather views/information - Emails/ and phone calls - Feedback
Industry and Business Stakeholders • Industry landowners/ratepayers • Industry businesses (all classifications) • Tourism operators • Local Interest Groups/Representatives	Inform Consult	- Gather views/information. - Targeted Survey - Shire website - Emails/phone calls - Feedback
Community stakeholders	Inform	- Shire's website

3.0 Shire of Dandaragan Industrial Land Needs Survey

The Industrial Land Needs Survey commenced on 29 September 2025 and ended on the close of business on 25 October 2025 (late submissions were accepted until 7 November 2025). Forty-nine responses were received. The survey targeted businesses and landowners involved in industrial operations, as well as other businesses that rely on the industrial sector (such as agriculture) and state agency stakeholders. Its purpose is to understand current need for Industrial land and assess additional demand. The survey sought information on industrial land needs based on twenty-one questions outlined in Table 2. The response rate for this survey represents approximately 30% of Industry groups and associated businesses with employees in the subregion.

Table 2: Business Community Survey Questions and Response Rate

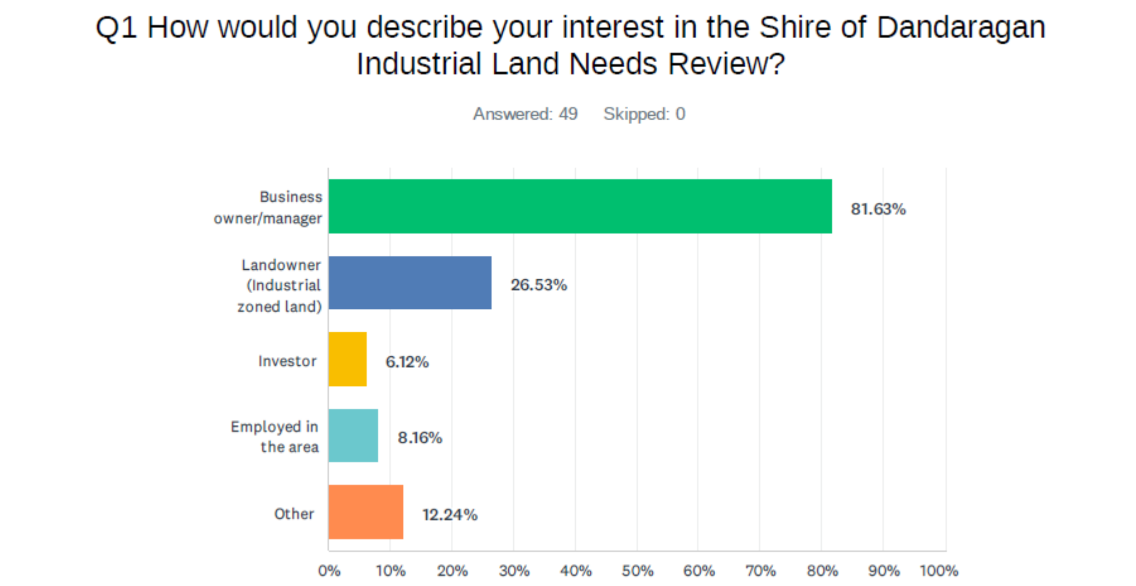
	Business Community Survey Questions	Response Rate
1	How would you describe your interest in the Shire of Dandaragan Industrial Land Needs Review?	49
2	Name of Business	24
3	What is the industry sector you are currently operating in (Choose up to 3 relevant industry sectors)	49
4	Please identify the Location (or closest town) of your business or landholding?	47
5	How long have you operated your business or owned industrial property in the Shire of Dandaragan?	47
6	Do you own your own premises or lease your own premises?	47
7	How many staff do you currently employ in the Shire of Dandaragan?	49
8	Which industries represent your major customers? (Choose up to 3 relevant industry sectors)	49
9	Where are your customers located?	48
10	If you operate a business, is your current site suitable for your operations?	48
11	If you operate a business, do you expect to expand in the next 5-10 years?	49
12	If yes to question 11, how much additional land is needed, how much would be suitable?	28
The following questions asked for a rating between fully disagree to fully agree		
13	The Shire of Dandaragan is a highly competitive location from which to run a business?	48
14	The Shire of Dandaragan is well connected to major markets and customers?	48
15	The Shire of Dandaragan is a resilient economy in the face of major economic shocks? (e.g. COVID)	47
16	The infrastructure and servicing (such as water, sewer, power, roads etc) available within the Shire of Dandaragan are of a suitable quality and sufficient capacity to support business operations into the future?	48

17	The internet and connectivity (e.g. online and telecommunications) services available within the Shire of Dandaragan are of a suitable quality and sufficient capacity to support business operations into the future?	48
18	Which locations in the LGA do you think are most suitable for future industrial development?	48
19	What are the biggest barriers and challenges that businesses face in the Shire of Dandaragan and the wider region?	41
20	What are the opportunities for businesses to grow and expand?	35
21	What would help businesses grow and remain competitive into the future?	38

3.1 Survey Participants Profile

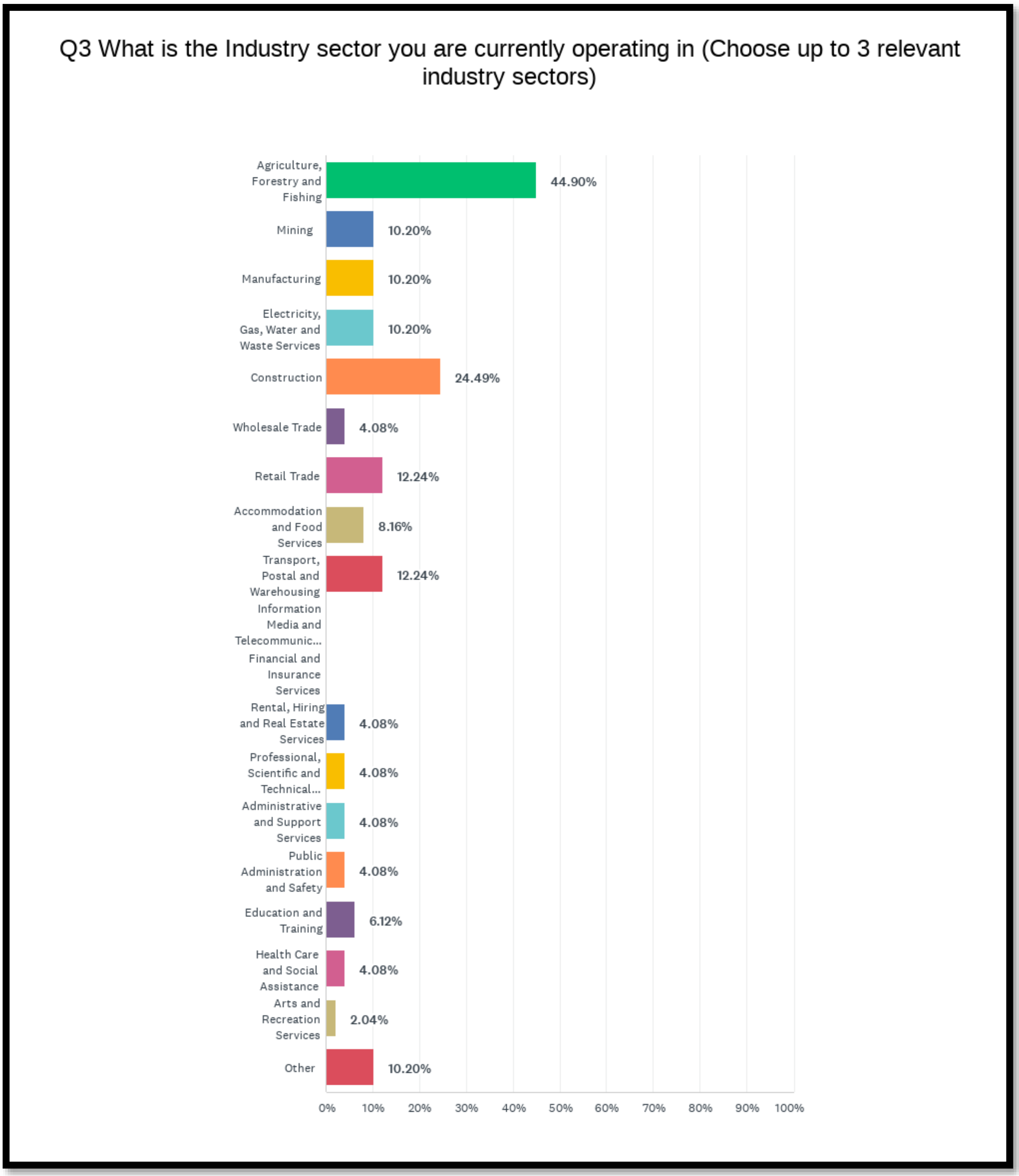
The majority of respondents to the survey were from the business owner/manager (82%). Landowners that don't operate a business comprised 26%. Investors and employees comprise 6% and 8 % of respondents (evidently respondents reported a combination of roles). Other respondents included farmers, government agencies, utility providers, board members, and non-residents of the Shire of Dandaragan (See Figure 1).

Figure 1: Respondents Land interests



ANSWER CHOICES	RESPONSES	
Business owner/manager	81.63%	40
Landowner (Industrial zoned land)	26.53%	13
Investor	6.12%	3
Employed in the area	8.16%	4
Other	12.24%	6
Total Respondents: 49		

Figure 2: Respondents Industry Sector



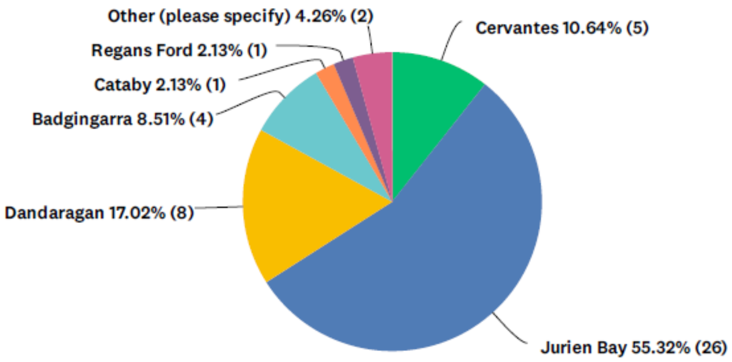
The majority of respondents to the survey represented the following Industry Sectors (See Figure 2) in order of volume of response:

- Agriculture, Forestry and Fishing
- Construction
- Transport, Postal and Warehousing,
- Retail Trade
- Mining, and Manufacturing and Electricity Gas Water and Waste Services

Figure 3: Location of Respondents

Q4 Please identify the Location (or closest town) of your business or landholding?

Answered: 47 Skipped: 2



ANSWER CHOICES	RESPONSES	
Cervantes	10.64%	5
Jurien Bay	55.32%	26
Dandaragan	17.02%	8
Badgingarra	8.51%	4
Cataby	2.13%	1
Regans Ford	2.13%	1
Other (please specify)	4.26%	2
TOTAL		47

The majority of respondents identified Jurien Bay as the closest town to the business (55%) (See Figure 3). 17% of respondents noted the town of Dandaragan as the closest, followed by Cervantes and Badgingarra. Figure 4 below indicates that most of the responses came from well-established business operating for 10 + years.

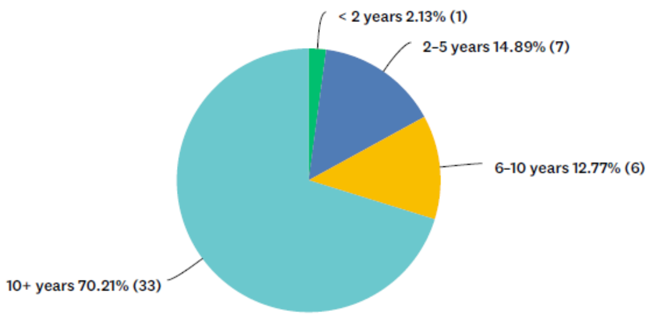
Figure 5 indicates that 66% of respondents own their own property, and 19% lease property. Other respondents both own and lease property or are prospective purchasers looking to purchase industrial land.

Figure 6 provides data that indicates that the small to medium size businesses responded to the survey, with the majority 42% having between 1-4 employees and 28% having between 5-19 employees. 18% of respondents are self-employed.

Figure 4: Business Operation Timeframe

Q5 How long have you operated your business or owned industrial property in the Shire of Dandaragan?

Answered: 47 Skipped: 2



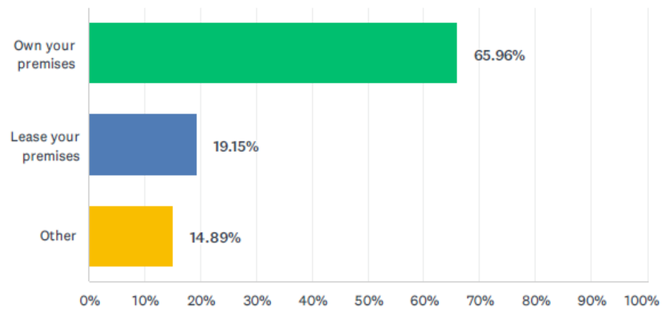
ANSWER CHOICES	RESPONSES	
< 2 years	2.13%	1
2–5 years	14.89%	7
6–10 years	12.77%	6
10+ years	70.21%	33
TOTAL		47

Figure 5: Own or lease property

Shire of Dandaragan Industrial Land Needs Survey

Q6 Do you:

Answered: 47 Skipped: 2

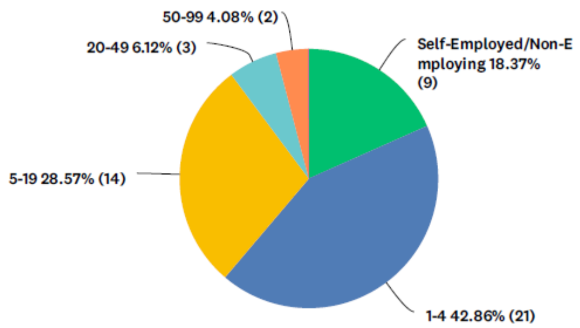


ANSWER CHOICES	RESPONSES	
Own your premises	65.96%	31
Lease your premises	19.15%	9
Other	14.89%	7
TOTAL		47

Figure 6: No of employees

Q7 How many staff do you currently employ in the Shire of Dandaragan?

Answered: 49   Skipped: 0



ANSWER CHOICES	RESPONSES	
Self-Employed/Non-Employing	18.37%	9
1-4	42.86%	21
5-19	28.57%	14
20-49	6.12%	3
50-99	4.08%	2
100-199	0.00%	0
200+	0.00%	0
TOTAL		49

Figure 7 highlights the key industry sectors that provided the customer base included:

- Agriculture, Forestry and Fishing
- Construction
- Mining
- Retail Trade
- Electricity Gas Water and Waste Services and Accommodation and Food Services

The most common sector for both business operation and customer base is 'Agriculture, Forestry and Fishing' (22 businesses operate in it; 27 businesses have major customers in it). - 'Construction' is the second most common sector for both (12 businesses operate in it; 17 businesses have major customers in it). Other sectors for business operation include 'Retail Trade', 'Transport, Postal and Warehousing', 'Mining', 'Manufacturing', and 'Electricity, Gas, Water and Waste Services'. The relevant customer industries, after agriculture and construction, include 'Mining', 'Retail Trade', and 'Other' are significant. Sectors, such as 'Accommodation and Food Services', 'Education and Training', and 'Rental, Hiring and Real Estate Services', appear in both lists but with lower counts. 'Information Media and Telecommunications' and 'Financial and Insurance Services' have very low or no representation as business sectors but do appear as customer industries. There is a strong overlap between the sectors businesses operate in and those that comprise their customers, especially in agriculture and construction. However, the customer base is slightly more diverse.

Figure 7: Which Industries represent your major Customers

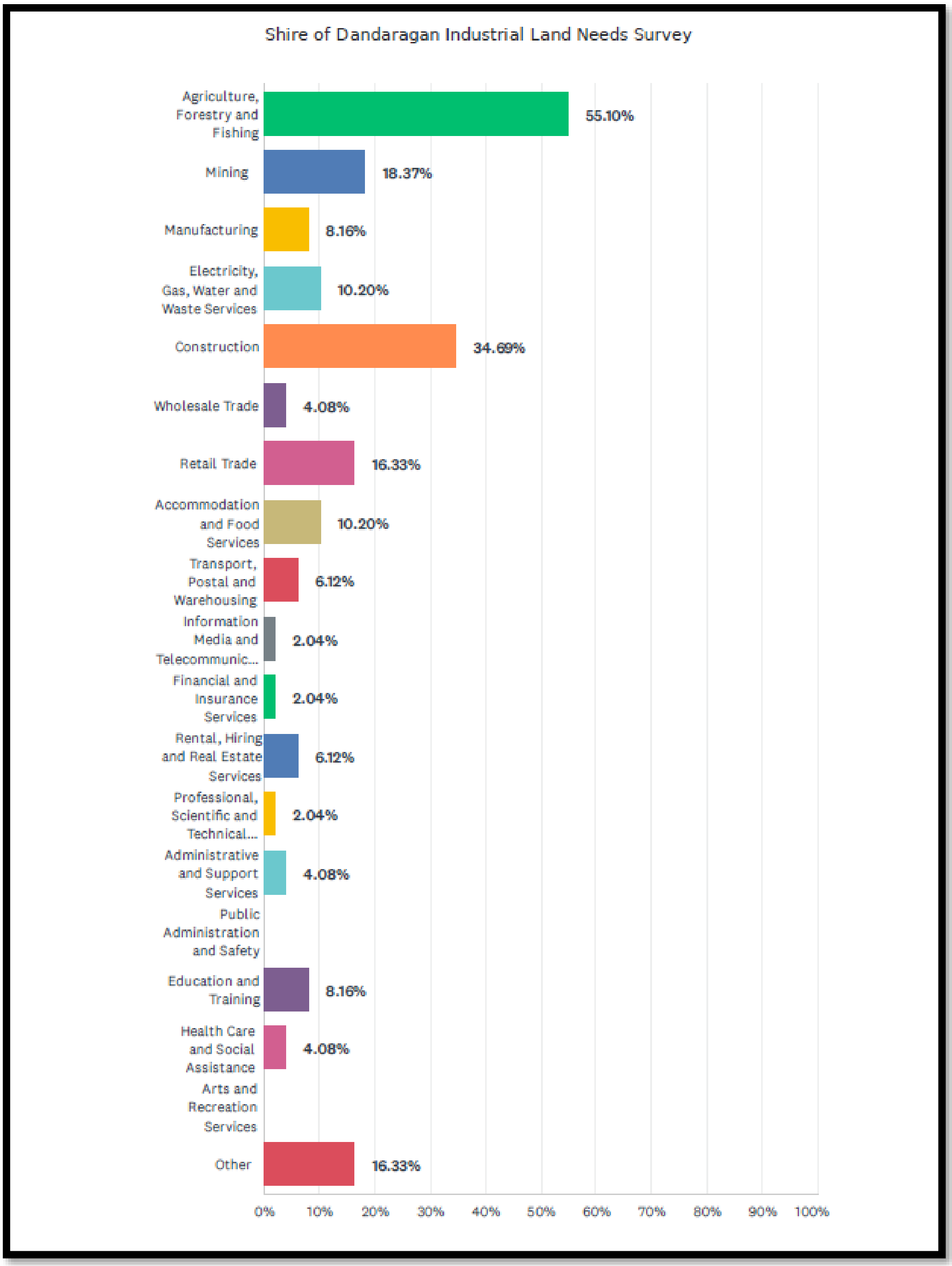
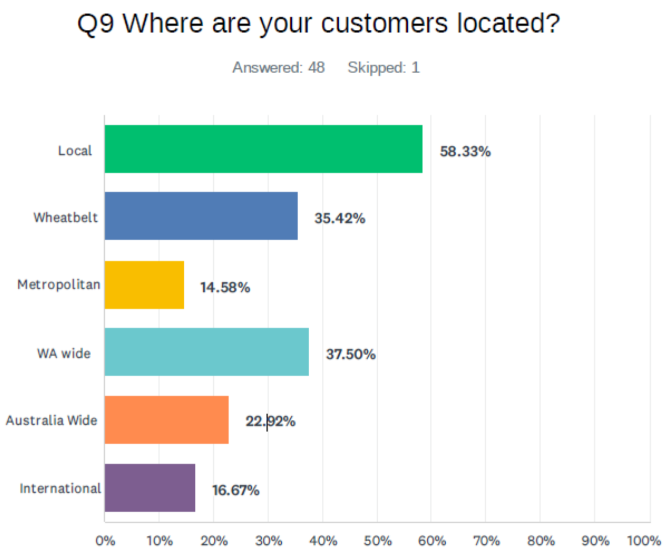


Figure 8: Customer Location



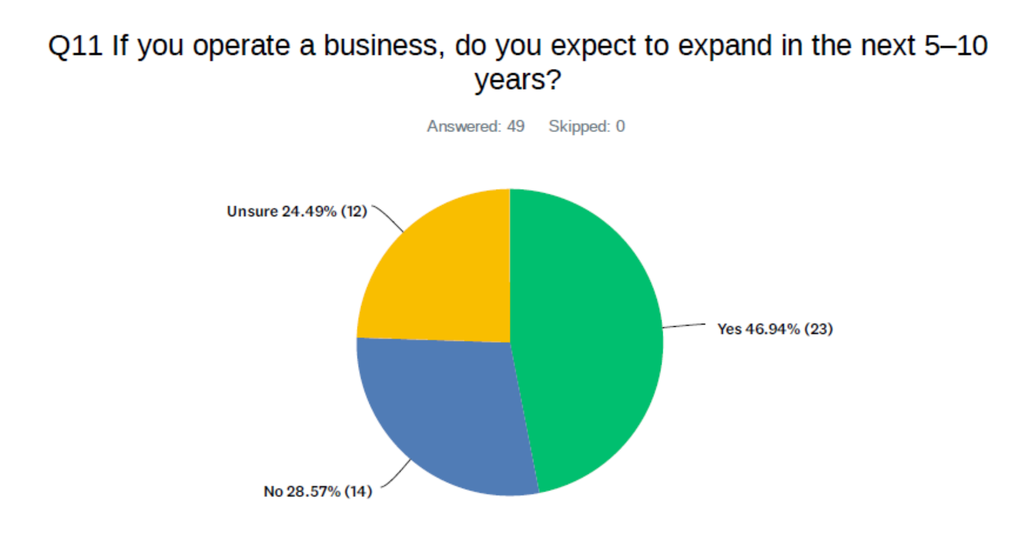
ANSWER CHOICES	RESPONSES	
Local	58.33%	28
Wheatbelt	35.42%	17
Metropolitan	14.58%	7
WA wide	37.50%	18
Australia Wide	22.92%	11
International	16.67%	8
Total Respondents: 48		

Figure 8 confirms that Local customers provide approximately 58% of the business support, with the Wheatbelt (35%) and broader WA regions also relying on industry from the Shire of Dandaragan (37%). National, Perth Metropolitan, and international customers represent 22%, 14% and 10% respectively of the business customer base according the survey outcomes.

3.2 Industry Intentions and Land use

Approximately 46% of responding businesses expect to expand operations in the next 5-10 years, with 28% of businesses not planning to expand. The remaining 25% are unsure at this stage. (See Figure 9).

Figure 9: Business Expectations – Expansion intention

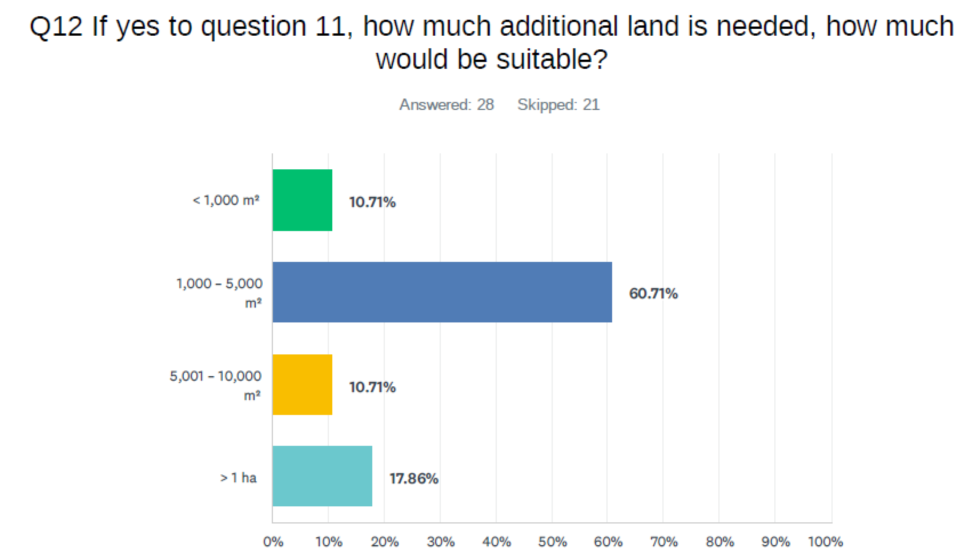


ANSWER CHOICES	RESPONSES	
Yes	46.94%	23
No	28.57%	14
Unsure	24.49%	12
TOTAL		49

According to Figure 10 below, respondents wanting larger sites (5,001–10,000 m^2 or >1 ha) operate mainly in Agriculture, Forestry and Fishing (7 respondents), followed by Construction (3), Mining (3), Transport, Postal and Warehousing (3), and smaller numbers in Retail Trade, Accommodation and Food Services, Education and Training, Electricity/Gas/Water/Waste Services, and Manufacturing.

The majority of respondents seek 1,000–5,000 m^2 sites. The industry sectors needing sites of this size include Agriculture, Forestry and Fishing (6 respondents), Construction (6), Electricity, Gas, Water and Waste Services (3), Other (3), Mining (2), Professional, Scientific and Technical Services (2), Retail Trade (2), and several other sectors (Accommodation and Food Services, Education and Training, Manufacturing, Public Administration and Safety, Transport, Wholesale Trade, Administrative and Support Services, and Arts and Recreation Services)indicate a need.

Figure 10: Additional land requirements



ANSWER CHOICES	RESPONSES	
< 1,000 m²	10.71%	3
1,000 – 5,000 m²	60.71%	17
5,001 – 10,000 m²	10.71%	3
> 1 ha	17.86%	5
TOTAL		28

3.3 Industry perspective on the Shire of Dandaragan

Questions 13–17 were presented in a Likert scale format, using a semantic scale ranging from 'Fully Disagree' to 'Fully Agree.' These questions aimed to capture the industry's perspective on business opportunities within the Shire of Dandaragan, focusing on areas such as competitive advantage, resilience, market connectivity, and the availability of essential infrastructure (including water, power, sewerage, roads, and internet).

Overall, the results indicate that respondents view market connectivity and economic resilience relatively positively, while infrastructure and especially internet/connectivity are seen less favourably. The responses to the questions asked are shown in figures as described below:

- Figure 11 - The Shire of Dandaragan is a highly competitive location from which to run a business? (Q 13)
- Figure 12 - The Shire is well connected to major markets and customers? (Q14)
- Figure 13 - The Shire is a resilient economy in the face of major economic shocks (Q15)
- Figure 14 - The infrastructure and servicing (such as water, sewer, power, roads etc) available within the Shire of Dandaragan are of a suitable quality and sufficient capacity to support business operations into the future? (Q16)

- Figure 15 - The internet and connectivity (e.g. online and telecommunications) services available within the Shire of Dandaragan are of a suitable quality and sufficient capacity to support business operations into the future? (Q17)

Figure 11: Shire of Dandaragan Competitive Location

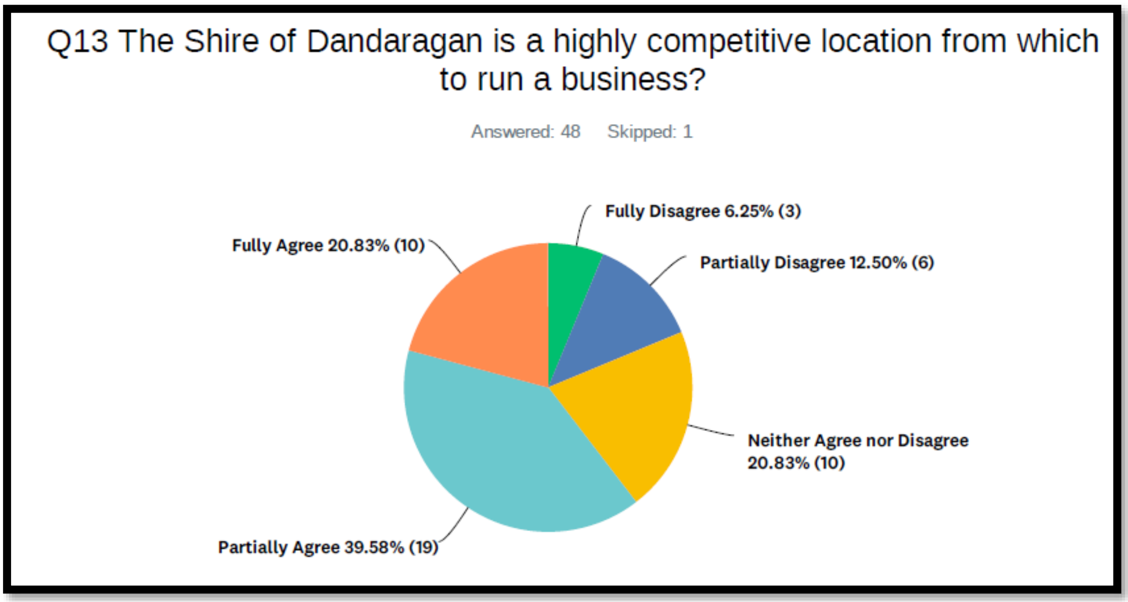


Figure 12: Shire of Dandaragan markets and customers

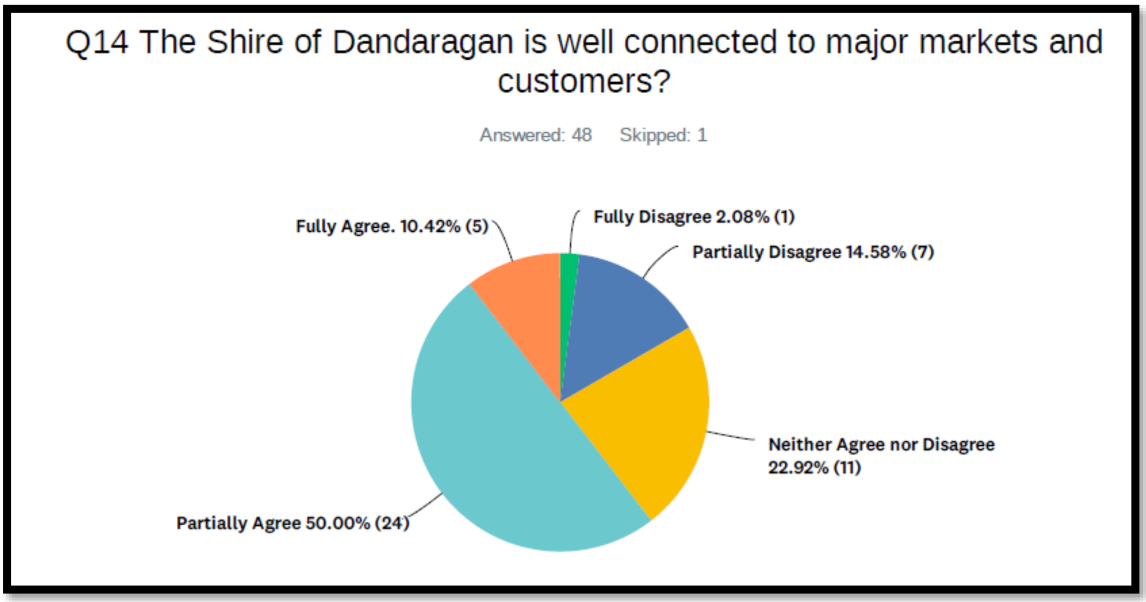


Figure 13: Shire of Dandaragan Resilient Economy

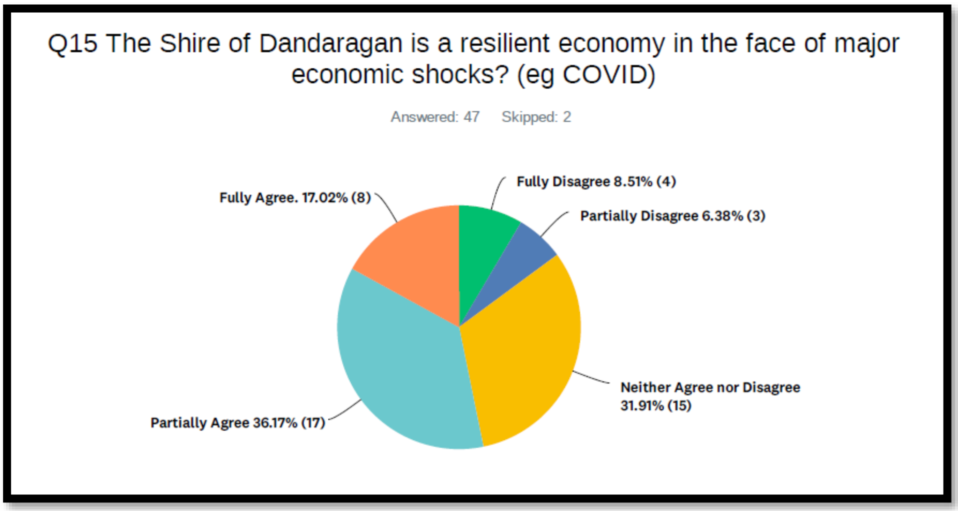


Figure 14: Infrastruture and Servicing

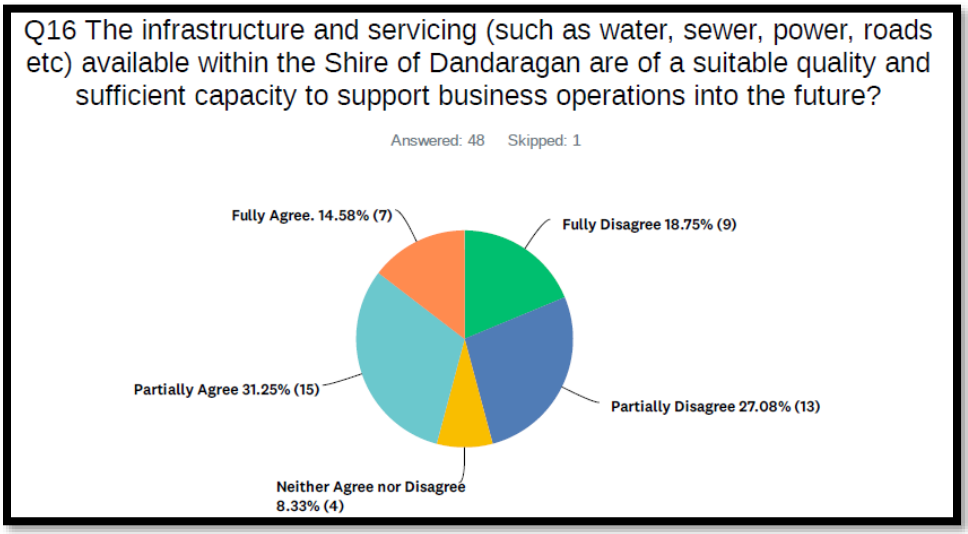
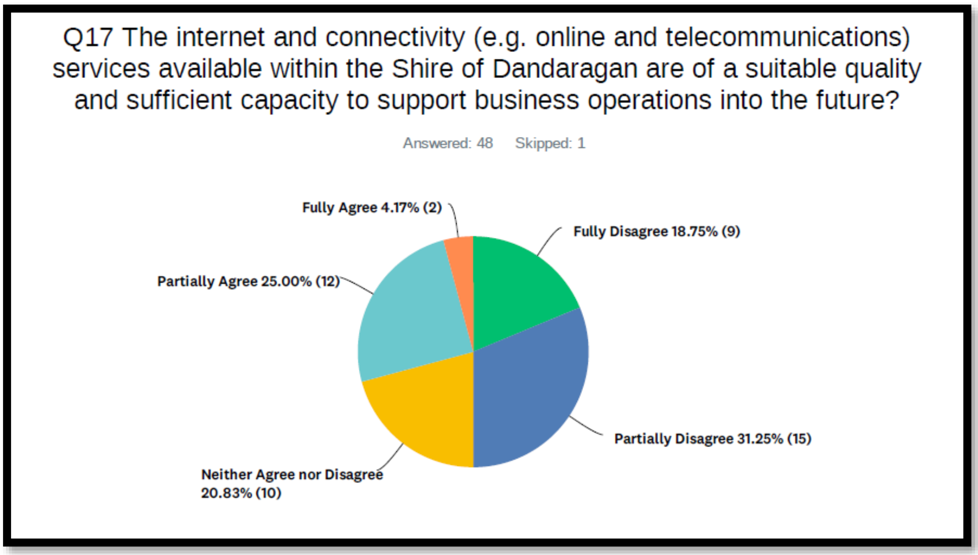
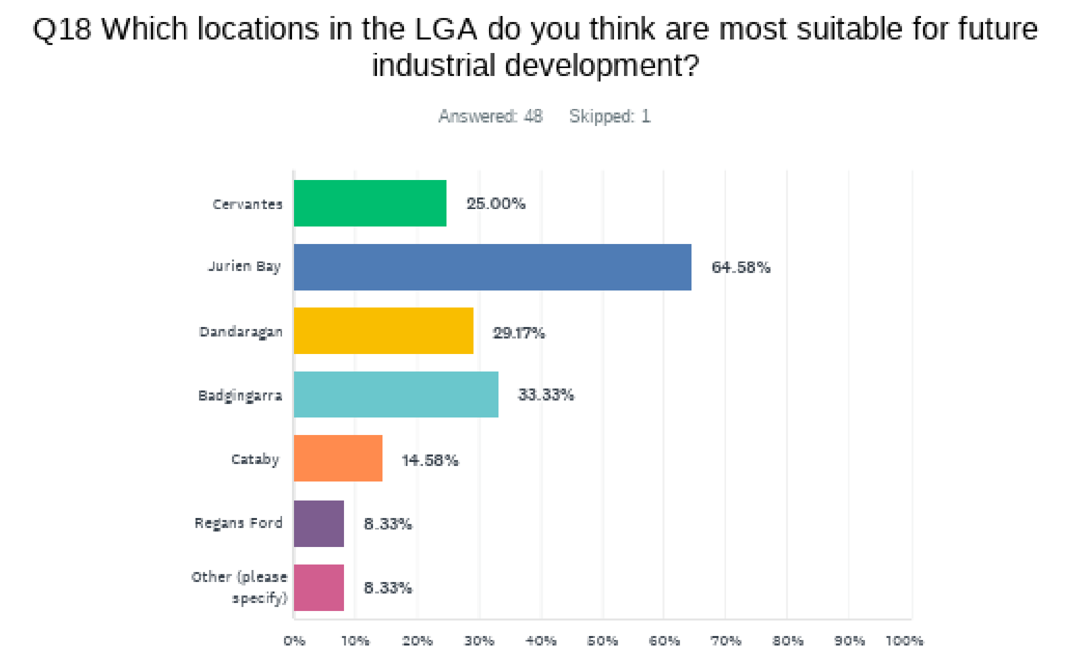


Figure15: Internet and connectivity



Analysis of the responses to the Likert questions using weighted averages provides a measure of central tendency, reflecting the overall sentiment across participants. Weighted averages give greater influence on questions with higher response counts, ensuring that the results represent the collective view more accurately. Overall, the survey results suggest that industry respondents view the Shire of Dandaragan as moderately competitive and reasonably well connected to major markets (scores of 3.56 and 3.52 respectively on a 1–5 scale (i.e. fully disagree – fully agree). Economic resilience also rated positively at 3.47. However, infrastructure quality (2.96) and internet connectivity (2.65) scored below 3.0, indicating these areas are perceived as weaknesses.

Figure 16: Suitable Industry locations



ANSWER CHOICES	RESPONSES	
Cervantes	25.00%	12
Jurien Bay	64.58%	31
Dandaragan	29.17%	14
Badgingarra	33.33%	16
Cataby	14.58%	7
Regans Ford	8.33%	4
Other (please specify)	8.33%	4
Total Respondents: 48		

Jurien Bay is considered to be most suitable location for future industrial development. Badgingarra and Dandaragan are both identified by respondents as suited to Industrial expansion as second or alternative options. Moderate support for expansion at Cervantes. Cataby and Regans Ford are also flagged as potential sites for Industrial Development.

3.4 Business Growth: Opportunities Challenges, Barriers

Questions 19-21 of the survey requested specific feedback from respondents in their own words. The information collected from these questions are included in Tables 2 -4 below

- Table 2: What are the biggest barriers and challenges that businesses face in the Shire of Dandaragan and the wider region?
- Table 3: What are the opportunities for businesses to grow and expand?
- Table 4: What would help businesses grow and remain competitive into the future?

In summary the common themes raised across all three questions highlight that respondents are most concerned with infrastructure, land/housing, and support for business growth, as well as workforce and regulatory issues, and include:
- Infrastructure (quality, development, and improvement)
- Land and housing availability and development
- Business growth and support
- Workforce and talent/housing
- Regulatory and cost-related challenges

Table 2 identifies the biggest barrier and challenges for business growth relate to lack of housing for employees. Industrial Land availability was highlighted as a reason for growth challenges. Inadequate Internet and Communication Infrastructure, and Freight and Transportation Logistics were seen as barriers to growth.

Table 3 summarises responses to the question on opportunities for business growth and expansion. Most responses were either neutral (66.67%) or negative (21.21%) in sentiment. Many comments focused on challenges impacting growth, as raised in Question 19. However, some opportunities were identified, particularly in the tourism sector and renewable energy development and agricultural innovation. Population growth was also seen as a potential driver, contingent on investment in infrastructure and adequate housing to support future demand.

Question 21: What Would Help Businesses Grow and Remain Competitive? is addressed in Table 3. All themes relate to affordability and support to start up business, support to acquire suitable, serviced Industrial land, and affordable housing options for employees.

Themes for encouraging business growth include Infrastructure Improvement Initiatives, Land Development and Access, Housing and Accommodation Access, Business Cost Reduction, Essential Services Expansion, Regulatory Streamlining, and Business Growth Support.

Table 2: Question 19: Biggest Barriers and Challenges

Key Theme	Type of comments	F
Employee and Workforce Housing	Accommodation for employees	15
	Distance, connectivity and supply chain issues are significant disadvantages for businesses together with size/scale of customer base.	
	Housing and long-term accommodation	
	Housing for future workers	
	Accommodation and rentals	
	Lack of housing for employees to rent.	
	Transport services and housing for staff	
	Lack of industrial land and more importantly lack of housing to accommodate employees, western power!	
	"Accommodation.	
	Land available to purchase "	
	Power, water, waste management and workers accommodation	
	staff and accommodation.	
	Internet remoteness employing qualified staff , accommodation	
	Lack of support and services for apprentices, land and housing availability for staff	
	Housing for staff	
Industrial Land Availability	Commercial land is bought by people that are just looking for storage and people that trying to start a Business can’t compete. Farmers are cashed up	10
	N0 land available in LIA	
	Affordable land	
	Not enough industrial land for people to expand or start new business in town need more to help grow the towns	
	Finding suitable premises to conduct business from	
	Area of land available and the zoning restrictions	
	No industrial lots available in the above locations. Makes it hard to invest substantially in a business premises to attract employees.	
	Lack of land for businesses who serve agriculture, wind and solar companies.	

	The lack of Industrial land, the state government who have no interest or concern for our towns, as was witnessed when they close Indian Ocean Dive for over 12 months to upgrade parts of the highway. Local business were not compensated for loss of income or for having to close down.	
	In the townsite of Dandaragan there is no land available for a business to start up and the land most appropriate for this purpose, as I understand it, is being considered for housing development. We need an industrial area for this town to be able to grow along with land for houses.	
Local Industry and Business Development	Reaching customers.	7
	Competition from the larger cities being in close proximity i.e.: Geraldton and Perth.	
	No industry as such, more is needed to develop infrastructure and industries to attract market share (especially tourism as is not a lot else on offer) to develop a local economy.	
	More competition in local domestic suppliers to make the town affordable to live in and more pressure on outside industry such as wind farms and mines to support local.	
	Getting enough people through the door to make the business viable	
	Transport and Advertising	
	Lack of Service & tradesman providers	
		6
Tourism Limitations	Travelling through the town site during holiday periods is atrocious.	
	"Congestion during school and other holiday periods.	
	Freight access and unloading facilities (large freight trucks)."	
	"Not enough for tourism eg. Accommodation, facilities, No shopping facilities	
	internet reception is poor and there is no septic (waste) disposal	
	Community push-back on progress, lack of accommodation (short stay and rentals).	
Freight and Transportation Logistics and Communication Infrastructure	phone coverage and condition of roads in ag region.	3
	Relightable power	
	Lack of freight and lack of reliable communications.	

Table 3: Question 20 'What are the opportunities for businesses to grow and expand?'

Opportunities for Growth: Some examples of Comments and Suggestions
Healthy communities assist business growth. A business can only grow if they can employ workers and without an attractive and vibrant community to move to it is incredibly hard to convince people to live 'remote' from the city lights.
If we could employ more people more easily, we could grow our business. Or if we could get people to come and live in Dandaragan with various contracting businesses, we could use their services.
Tourism is probably still the highest growth area, with almost endless opportunities to enhance the regions options, however, given the residential growth there is opportunity to tap into and support the building and infrastructure market.
I feel if the town doesn't grow in size and infrastructure, it restricts the ability for small businesses to grow
If the state government had any genuine interest in our towns & our region & did things like replace our septic systems with deep sewer, which was a priority to do 20 years ago as our septics are in the water table, & nothing has happened except for some money allocated to the deep sewerage as "Super Town" money. The Marina is a disgrace as international tourists hop aboard a boat in the Marina where it smells like a sewer pond & dead fish are floating on the water. When a child dies from digesting water/fish from the Marina, then something will be done. The Premier should be mad to come up & drink some water from the Marina! The Government needs to release the land between Whitlock/Aquila/Seaward/Bashford Streets for more residential land close to the centre of town & to finally release the strip of land along Bashford Street for residential strata developments so we can house people who want to be in an owner-occupied unit. That could include a few over 55yr complexes, an alternative Lifestyle Village like Moora has etc.
Provide more housing and make school a senior high school to keep families here
Growth in the shire requires growth in all sectors. There is plenty of opportunities here but housing is an issue currently
Limited due to population being on the cusp, so not a lot of staff opportunities, not enough entry level or rental accommodation for long term residents (workers) to attract more staffing options, local housing and the current size of the town which is not big enough to support more business (as evidenced by failed business in the last 12 months), but need to grow in order to grow, catch 22.
5+ acre industrial lots
Bigger local businesses to offer more services and compete with out of shire businesses.
Considered favourable.
endless if we can get land to grow and compete against the old business that won't sell product to new or emerging businesses
Everyone has the opportunities here. Hard work and dedication pay off
Increasing population
Manufacturing and storage for local and holiday makers

more people moving to the into the country
Technologies around agriculture.
The industrial land within the Jurien Bay Harbour, managed by DTMI - Maritime, is intended for maritime related industrial uses and not for general industrial uses. There is currently sufficient land zoned industry - maritime within the harbour to cater for expansion of maritime related uses together with a significant area for 'future investigation' to accommodate future growth.
We are so close to Perth- it's a great tree change

Table 4: What would help businesses grow and remain competitive into the future?

Key Theme	Type of comments	F
Business Growth Support	New innovations.	11
	More support for existing business and less push for new startups. Our Shire is well serviced in most areas (some still lacking) but adding more of the same is diluting the available work and makes it nonviable for the existing businesses. It's marketed as 'Competition' but in a rural area it's just another business, it's not making more clients or work it simply makes less income for more people. More support to businesses already established in the Shire to be active in their area. Focus on service delivered rather than cost - locals sometimes have more interest in the quality of their work.	
	local government incentives that support start ups	
	Affordability	
	We need to retain our teenagers in our town & our young families, most of them leave to put their kids into school in Perth. We desperately need a Senior High School which had been promised 20 years ago & a boarding school so inland country students can come to Jurien Bay & not have to go to the city. When this range of population is retained in Jurien Bay, it will help every business to grow & be competitive. We also need tertiary education here which will help to retain the younger generation, again, helping to grow all our businesses, & with growth, comes competitive.	
	Qualified trades people	
	Local support and Businesses in the Shire of Dandaragan will grow and remain competitive by investing in tourism, agriculture and renewable energy, improving local infrastructure and internet, supporting small business innovation, and promoting the region to attract new residents, workers and visitors.	
	That needs to be assessed on an individual basis, however, in general the costs of supporting local businesses is somewhat unfavourable.	

	I, for example, try to always make sure I have everything I will need beforehand, so there is no need to purchase from the local stores/businesses, as it's cheaper for me. More industry would assist the circular economies, help businesses support one another, and hopefully help reduce certain costs for businesses.	
	Infrastructure and local government incentives that supports start ups	
	Regulate Business -Stop back yard business that are not approved.	
Industrial Land	Land to open bigger premises.	8
	Decent sized industrial space at an affordable price	
	Available premises and accommodations	
	Land available to grow business in helping drive local economy	
	Having available land for both housing and industrial that have power available to suit the needs of the business	
	Larger blocks of industrial like Gingin rural residential lots	
	Industrial Land	
	More industrial land at a realistic price and sizes. The green light for development and more places to eat or drink with an ocean view. Still can't believe in only recent time we have a place we can get a meal or a drink and look at our beautiful bay. Needs to be more of it.	
Infrastructure	Infrastructure	8
	reduce power costs, accommodation for staff, schools to encourage staff to stay.	
	Improved services surrounding power, water, waste management and workers accommodation	
	Phone and data, road upgrades and housing availability in Dandaragan and Badgingarra.	
	Bypass road in Jurien Bay, more than one entrance to the LIA, better internet and phone coverage in the whole shire as its non-existent in areas of beach ridge, alte mare, the heights, hill river, Cervantes, sandy cape, pinnacles....	
	More demand, higher population and more local infrastructure for elderly, youth, schooling and medical, the basic essentials.	
	Improved telecommunications and network	
	Improved, more direct access/egress for heavy vehicles that avoids existing and planned residential and/or tourist focused areas.	
	Available rentals for staff	6

Housing and Accommodation	Affordable Accommodation for staff	
	Residential growth	
	More residential and commercial land to allow for an increase of population which would then help businesses grow	
	Housing	
	Main issue we find is housing. Finding work is not an issue. Keeping up with it is the issue. We have people wanting to start but no accommodation. Whoever owns that vacant land at the foreshore needs to build it's accommodation.	
Other comments	Reduction of red tape/Less red tape	4
	Council to listen more to ratepayers	
	Make it easier to subdivide small lots off farmers to create industrial lots.	
	Additional Shopping Centre	

3.5 Conclusion

The survey outcomes highlight an immediate need for strategic planning and investment to address industrial land shortages and infrastructure gaps. Key priorities include:

- Allocate and release appropriately sized, serviced lots in Jurien Bay and other suitable locations to meet projected demand.
- Improve power, water, waste management, and freight logistics; prioritize reliable internet and telecommunications.
- Facilitate residential development and affordable accommodation to attract and retain workforce.
- Streamline regulatory processes and introduce local government support for existing businesses and start-ups.
- Leverage opportunities in tourism, renewable energy, and agribusiness to strengthen resilience and competitiveness.

Proactive measures to address these issues may position the Shire as a competitive and sustainable industrial hub, and may also alleviate constraints on business growth and regional economic development.

Appendix C: Industrial Land Market Assessment

ECONISIS

DANDARAGAN INDUSTRIAL LAND MARKET ASSESSMENT

Client: Shire of Dandaragan

Title: Dandaragan Industrial Land Need Assessment

Version: FINAL

Date: Thursday, 22 January 2026

econisis.com.au

Prepared for:

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VERSION CONTROL

VERSION	PURPOSE	AUTHOR	REVIEWER	APPROVER	APPROVAL DATE
DraftA	Draft for internal review	RS/TC	MW	MW	14/11/2025
DraftB	Draft with economic value	RS/MW	EW	MW	05/12/2025
DraftC	Draft for client review	TC/MW	EW	MW	09/12/2025
Final	Final Report	JB?MW	EW	MW	22/01/2025

APPROVAL FOR ISSUE

APPROVER	CONTACT	SIGNATURE	DATE
Mark Wallace PRINCIPAL	**T**: 0431 676 254 **E**: mark.wallace@econisis.com.au		Thursday, 22 January 2026

CONTENTS

FIGURES AND TABLES

1 INTRODUCTION

This section provides an overview of the background, purpose, and scope of the report.

1.1 Background and Context

The Shire of Dandaragan is located north of Perth Metro in Western Australia and comprises the four townships of Jurien Bay, Cervantes, Badgingarra and Dandaragan. The Shire is one of 42 local government areas within the Wheatbelt and one of two LGAs in the Coastal Wheatbelt sub-region. The Shire covers approximately 6,712 square kilometres and is positioned on the Turquoise Coast, with a tourism-orientated coastal environment and inland agricultural production supporting the local economy.

Located on the Turquoise Coast, with pristine beaches ideal for swimming, snorkelling, diving, fishing and windsurfing, the Shire's landscape includes beautiful national parks with native flora and fauna, bush walks, unique Australian wildflowers and farming land.

Beyond the Shire's community-led and tourism investments, there are a number of larger commercial and resource projects — both operating and proposed — that are materially influencing economic development and industrial land demand in the Shire. These projects span three primary clusters: renewable energy, mining and agribusiness:

- Yandin Wind Farm (near Dandaragan): ~214 MW (51 turbines); large construction program and ongoing operations/maintenance contracts; significant short-term demand for contractor laydown and transport support.
- Badgingarra Wind Farm and Badgingarra Solar Farm (Hill River): co-located wind (≈130 MW) and solar (≈17.5 MW) assets, delivered 2018-2019; precedent for mixed wind/solar clustered development and associated local contract work.
- Emu Downs Wind & Emu Downs Solar: established wind and solar assets west of Badgingarra that continue to generate local O&M and logistics requirements.
- Iluka Cataby mineral sands (Cataby) and Tronox Cooljarloo operations: established mineral sands activity in the Cataby–Eneabba corridor that continue to generate ongoing supply-chain, maintenance and contractor work for the region.
- Eneabba downstream processing / rare-earths activity (regional refinery / processing investment north of the Shire): presents potential for additional feedstock and service contracts drawing on the local workforce and equipment suppliers.
- Warro gas exploration and other resource appraisal activity: exploration and appraisal phases create intermittent demand for site services, accommodation and contractor yards; commercial development would have larger long-term implications for industrial servicing.
- Westpork ("Moora") intensive piggery and associated feed/processing infrastructure: large-scale intensive livestock proposals that, when active, drive demand for feed supply logistics, waste handling, specialised maintenance, and services located on industrial land.
- Dinner Hill irrigated horticulture precinct (feasibility / water studies): a State-led water/food study that could enable significant new irrigated horticulture area; development of packing, cold-chain and value-adding infrastructure would create sustained demand for larger serviced lots suitable for cold storage, packing sheds and transport yards.

In 2020, the Department of Planning, Lands and Heritage, in partnership with the Western Australian Planning Commission, conducted a Regional Land Supply Assessment for the Shire of Dandaragan. This Assessment found:

> *"Land zoned for industrial purposes is divided into five areas/ estates at Badgingarra, Cervantes, Dandaragan and Jurien Bay. As at December 2018, there were approximately*

120 lots on land zoned for industrial purposes, covering 133 hectares. The IRIS model classified 22 hectares (16 per cent) as developed; 2 hectares (1 per cent) as undeveloped; and 109 hectares (82 per cent) as unrated. Lots classified as unrated included large parcels of Crown land located adjacent to the Seville Street and Coalseam Road industrial areas in Cervantes and Jurien Bay respectively.[1]"

1.2 Report Purpose and Structure

Econisis has been engaged by the Shire of Dandaragan to undertake an industrial land needs assessment for the Shire. This information seeks to provide the Shire with a comprehensive understanding of potential future industrial land demand scenarios as well as advice and analysis on the typology, location and strategic justification for future industrial land availability.

This report includes the following sections:

- **Introduction** – This section provides an overview of the background, purpose, and scope of the report.
- **Dandaragan Industrial Economy Profile** – This section provides an overview of the economic and social attributes of the Shire and wider sub-region that influence industrial land demand.
- **Industrial Land Trends, Drivers, Typologies And Parameters** – This section profiles industrial market trends and drivers, including the impact of emerging industrial land trends. It also provides advice on the typology/sizing and general locational parameters of industrial land required to meet forecast needs. This will consider use type as well as strategic and general industrial typologies and lot sizes.
- **Dandaragan Industrial Land Need Assessment** – This section provides a series of projections of the future need for industrial land in the Shire to 2036.
- **Economic Justification for Land Availability** – This section estimates the contribution to the Shire of additional industrial land being zoned, serviced and occupied and applies cost benefit analysis techniques to quantify this value.

1.3 Statistical Geographies

For the purpose of this assessment, the primary statistical geography is the Dandaragan (S) Local Government Area (LGA).

[1] DPLH (2020) Dandaragan Regional Land Supply Assessment accessed at https://www.wa.gov.au/system/files/2021-08/LSD-Dandaragan-Regional-Land-Supply-Assessment-2020-Report.pdf

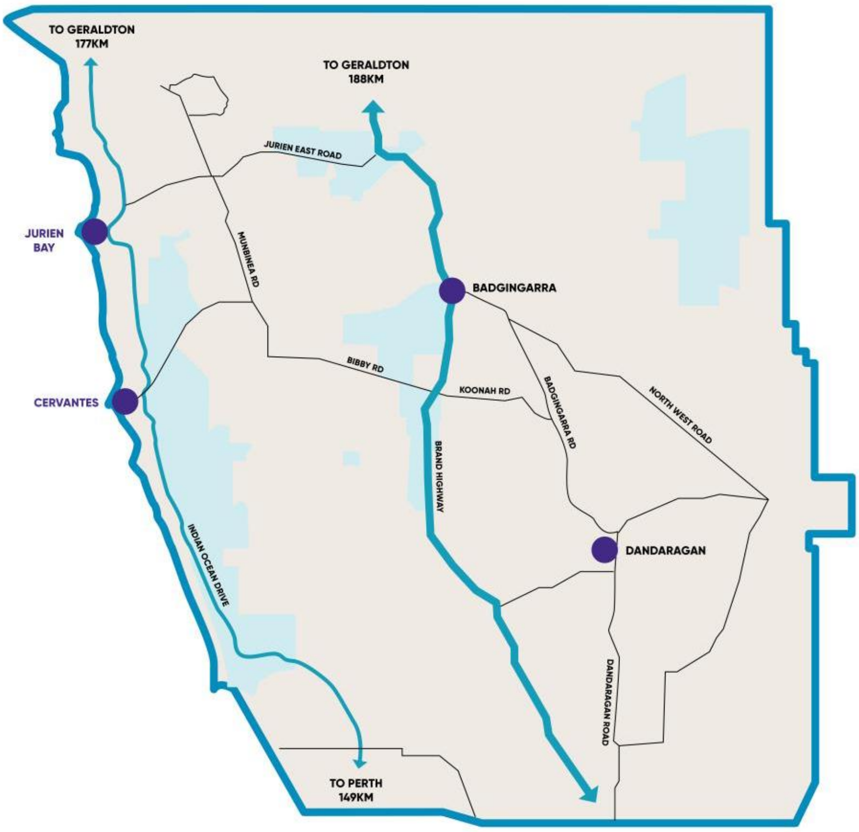

Figure 1 Dandaragan (S) LGA

A secondary study area (or sub-region), covering the Shires of Gingin, Dandaragan and Coorow has also been considered to understand local and regional industrial land demand drivers. All three LGAs are supported by major transport infrastructure corridors in the form of the Brand Highway and the Indian Ocean Drive.

1.4 Glossary and Abbreviations

The following terms and abbreviations are referenced in this report:

Table 1 Glossary and Abbreviations

Term/Abbreviation	Definition
ABS	Australian Bureau of Statistics
BCR	Benefit Cost Ratio
CAGR	Compound Annual Growth Rate
CBA	Cost Benefit Analysis
DA	Development Application/Approval
EIA	Economic Impact Assessment
GVA	Gross Value Added
LGA	Local Government Area
NPV	Net Present Value
(S)	Shire
SA2	Statistical Area 2
SQM	Square Metre
WA	Western Australia
$m	Millions of dollars

2 DANDARAGAN INDUSTRIAL ECONOMY PROFILE

This section provides an overview of the economic and social attributes of the Shire and wider sub-region that influence industrial land demand.

2.1 Socio-Economic Profile

2.1.1 Population

The residential population of the Dandaragan LGA in 2024 was approximately 4,882 people. This is up from 3,341 in 2012, representing growth of 1,541 people.

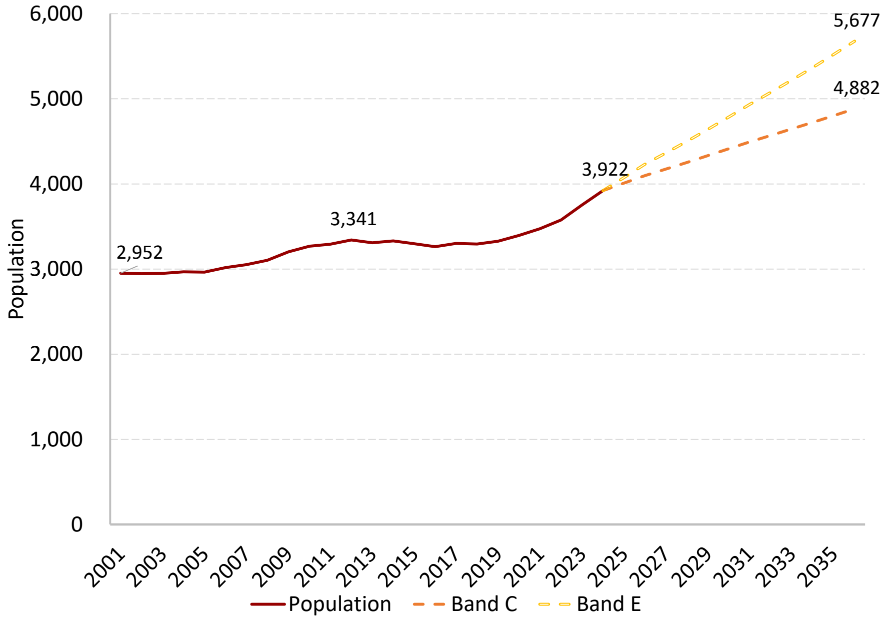

Figure 2 Population, 2001-2036, Dandaragan LGA

This growth is expected to continue. Estimates by Econisis using growth rates in the medium series population projections from the WA Tomorrow forecasts (2024), indicate the population will continue to grow at faster rates than previous years. The population of Dandaragan LGA is expected to reach 4,882 by 2036.

A population scenario was developed by Geographia for the Shire of Dandaragan Growth Plan. This scenario differs from the WAPC WA Tomorrow as it includes the impact of short-and medium term projects on the population of the Shire. This population compared with the WAPC WA Tomorrow Central and Upper Bands is illustrated below.

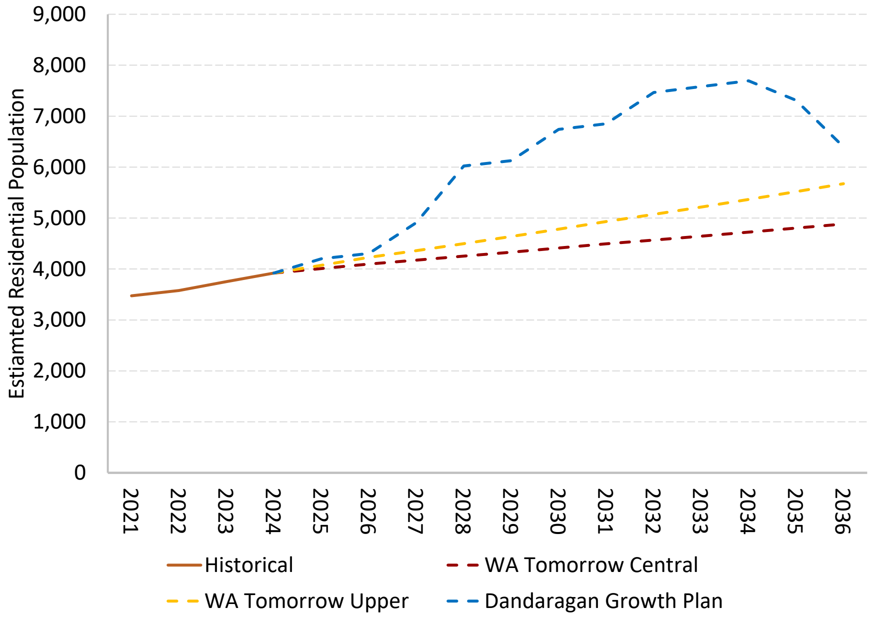

Figure 3 Population Projection Scenarios, WA Tomorrow and Geographia, 2021 to 2036

The project based nature of the Geographia profile sees population accelerate in the short to medium term well above the WA Tomorrow Upper band and reach almost 8,000 people by 2034. However, because of the project-based nature, the profile also sees the population increase then decline back down towards the WA Tomorrow scenarios, though remaining above the Upper Level at approximate 6,500 people by 2036.

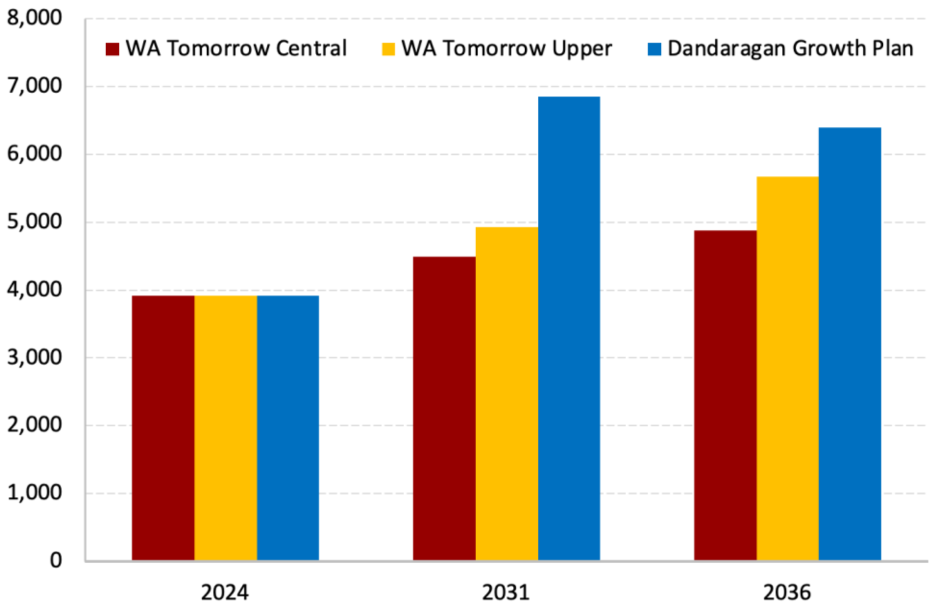

Figure 4 Population Projections, 2024-2036, Dandaragan LGA

All series start at 3,921 in 2024. By 2031 the WA Tomorrow projections reach 4,494 (central) and 4,932 (upper), while the Dandaragan Growth Plan projects 6,851, showing a markedly stronger near-term uplift. By 2036 WA Tomorrow projects 4,882/5,676, and the Growth Plan is 6,398, indicating the Growth Plan assumes a more front-loaded growth trajectory that moderates toward 2036.

2.1.2 Census Profile

A summary of key attributes of the Dandaragan LGA from the 2021 Census of Population and Housing is provided in the table below.

Table 2 Census Profile, 2021, Dandaragan, WA, Australia

Indicators	Dandaragan LGA	Western Australia	Australia
Headline			
Population	3,355	2,660,026	25,422,788
Median Age	51	38	38
Average Household Size	2.2	2.5	2.5
Share of Population 0-14 (%)	14.1%	19.0%	18.2%
Share of Population 65+ (%)	27.6%	16.1%	17.2%
Born in Australia	74.1%	62.0%	66.9%
Share of People Attending Educational Institutions			
Pre-School	42	45,452	484,185
Primary	216	222,555	2,075,224
Primary - Government	26.2%	19.3%	18.5%
Primary - Catholic	0.5%	4.5%	5.2%
Primary - other non-Government	0.4%	3.6%	2.2%
Secondary	117	175,841	1,629,624
Secondary - Government	12.8%	12.7%	12.2%
Secondary - Catholic	1.1%	4.5%	4.8%
Secondary - other non-Government	0.6%	4.6%	4.2%
Tertiary	56	172,239	1,789,994
Tertiary - Vocational education (including TAFE and private training providers)	4.2%	7.4%	7.8%
Tertiary - University of other higher education	3.3%	13.9%	15.4%
Weekly Incomes			
Personal	$710	$848	$805
Family	$1,704	$2,214	$2,120
Household	$1,305	$1,815	$1,746
Share of Household			
Couple family without children	41.6%	28.0%	27.6%
Couple family with children	20.9%	32.0%	31.1%
One parent family	6.4%	11.0%	11.3%
Other family	0.6%	1.0%	1.2%
Lone Person Households	28.3%	25.0%	25.1%
Group Households	2.3%	3.0%	3.8%
Dwelling Occupancy			
Occupied	49.3%	89.1%	89.9%
Unoccupied	50.6%	10.9%	10.1%
Dwelling Type			
Separate house	91.9%	79.7%	72.3%
Semi-detached, row or terrace house, townhouse etc	2.8%	13.0%	12.6%
Flat or apartment	0.7%	6.5%	14.2%
Other dwelling	3.8%	0.6%	0.6%
Tenure			
Owned outright	46.8%	29.2%	31.0%

Indicators	Dandaragan LGA	Western Australia	Australia
Owned with a mortgage	24.9%	40.0%	35.0%
Rented	22.1%	27.3%	30.6%
Other tenure type	4.9%	2.1%	2.0%
Tenure type not stated	1.5%	1.4%	1.5%

Key findings from the socio-economic profile include:

- Smaller shares of population aged 0-14
- Significantly older median ages in Dandaragan LGA
- Below average household sizes
- Below average personal and household incomes compared to state and national levels
- Significantly greater number of unoccupied dwellings
- Below average shares of Couple Family with Children Households

2.1.3 Unemployment Rate

Unemployment rates in Dandaragan decreased in 2021, as a combination of an increasingly strong labour market, including high job vacancies and ongoing labour shortages due to a slowing in previously strong population growth. The unemployment rate of Dandaragan has remained historically below that of the rest of the State, with WA having an unemployment at least 1% higher between 2020 and 2025.

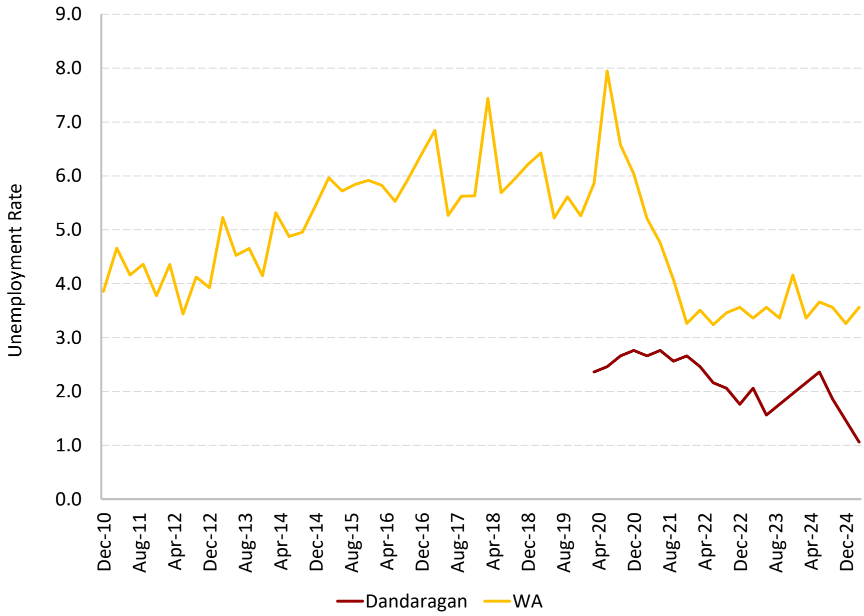

Figure 5 Unemployment Rate, Dandaragan LGA & WA, December 2010 to Mar 2025[2]

2.1.4 Employment by Industry

Agriculture, Forestry and Fishing is the clear driver with 418 jobs, followed by Mining at 243 and Construction at 230. Together these top three sectors account for 891 jobs, which is about 60 percent of all employment shown. This highlights a labour market built around primary production, resource activity and construction, with all other industries each making up only small individual shares.

[2] Department of Jobs (2023) SALM June 2022 accessed at jobs.gov.au

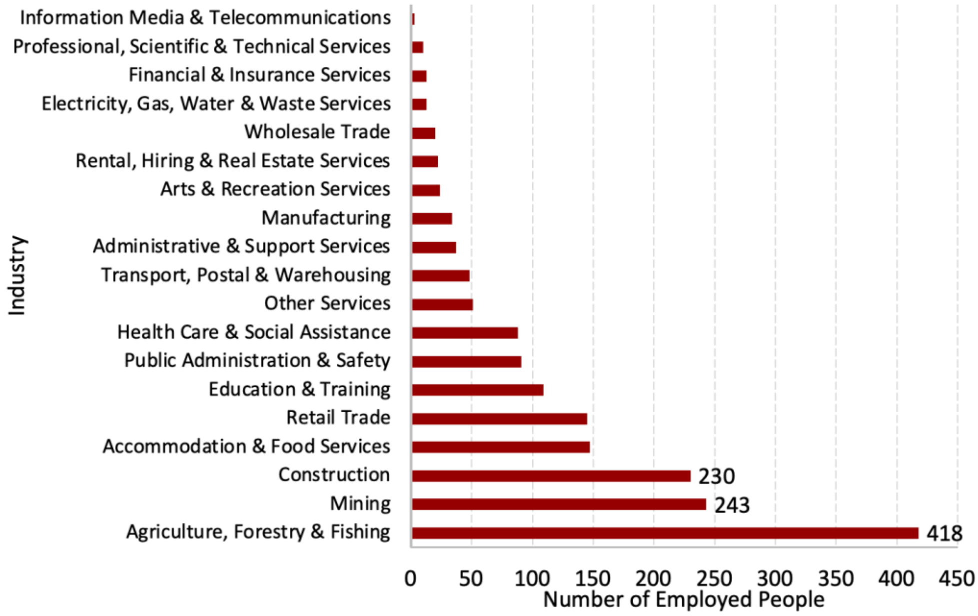

Figure 6 Number of Employed People by Industry, Dandaragan LGA, 2024[3]

2.1.5 Number of Registered Businesses

The number of registered businesses in Dandaragan LGA has shown a relatively stable increase over the past five years. In 2020, there were 515 registered businesses, which decreased slightly to 506 in 2021, most likely associated with the early phases of the COVID-19 pandemic. The following year, in 2022, the number rebounded to 531, followed by 544 in 2023 indicating a strong recovery. The number of businesses decreased slightly to 528 in 2024, but made an upturn in 2025 to 541.

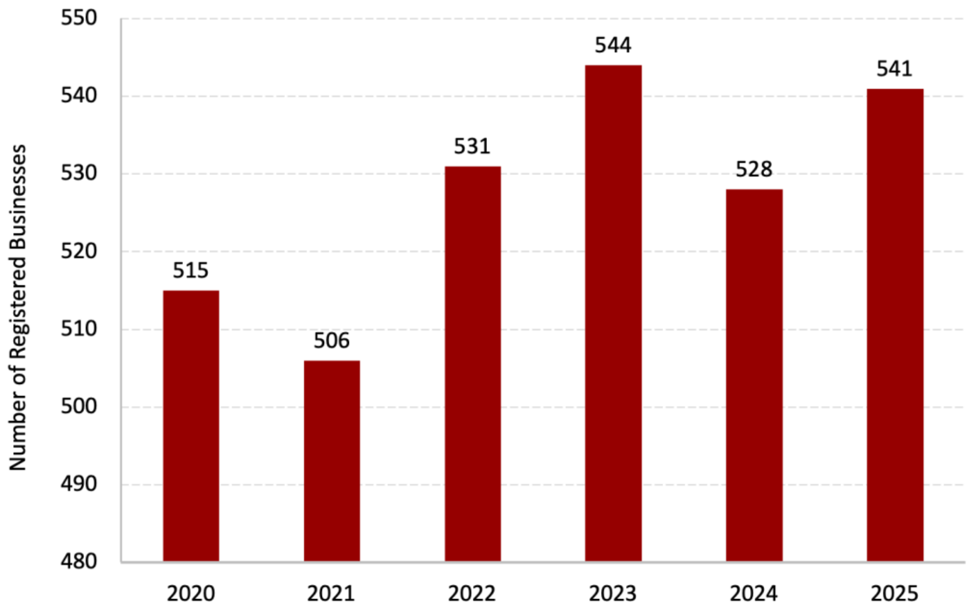

Figure 7 Number of Registered Businesses, Dandaragan LGA, 2020-2025[4]

[3] REMPLAN (2025), Economy Profile, accessed at https://app.remplan.com.au/dandaragan/economy/industries/employment
[4] ABS (2022) Counts of Business Registration, accessed at https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits

Agriculture, Forestry, and Fishing is the largest sector in the Dandaragan business community, with 218 businesses in this industry. The agricultural industry plays a crucial role in the region's economy by providing employment opportunities, contributing to local food production, and fostering rural development.

Construction follows with 61 businesses, highlighting the significance of infrastructure development in the region. Rental, Hiring, and Real Estate Services come next with 48 businesses, indicating the importance of property and housing in Dandaragan.[5] These 3 industries comprise of 62% of businesses in Dandaragan as of 2024.[6]

Figure 8 Number of Registered Businesses by Industry, Dandaragan, 2025

Industrial activity is utilized by a diverse range of industries and sectors in the economy. For this assessment, the following industries represent the main industries:

- Transport, Postal and Warehousing -35
- Manufacturing -16
- Wholesale Trade - 9

The activity of each of these industries is 100% allocated to industrial land.

Other secondary sectors for which industrial land activity is a notable share of activity include:

- Agricultural, Forestry and Fishing – including machinery and equipment storage and off farm harvest/product storage - 211
- Construction – including construction materials storage - 69
- Electricity, Gas, Water and Waste Services - 3

In 2025, 11.7% of the total registered business belong to one of the main industries in regard to industrial land activity, and 66.6% belong to a secondary sector.

[5] ABS (2022) Counts of Business Registration by Industry, accessed at https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits
[6] As Above

3 INDUSTRIAL LAND TRENDS, DRIVERS, TYPOLOGIES AND PARAMETERS

This section profiles industrial market trends and drivers, including the impact of emerging industrial land trends. It also provides advice on the typology/sizing and general locational parameters of industrial land required to meet forecast needs. This will consider use type as well as strategic and general industrial typologies and lot sizes.

3.1 Industry Market Trends and Drivers

3.1.1 National and Regional Overview

Industrial activity across Australia continues to shift in response to growth in freight movements, higher distribution volumes and changes in retail behaviour. Online shopping has grown strongly, and this has increased the need for warehousing, fulfilment centres and transport capacity. Distribution networks are expanding, and operators continue to seek land suited to truck access, storage and logistics activity.[7]

Manufacturing employment has been declining over time, but small fabrication, mechanical repairs and niche processing remain stable across most regions. Wholesale trade activity has held steady, with consistent demand for storage and distribution space. Employment in electricity, gas, water and waste services has increased as investment in renewables, grid upgrades and waste infrastructure grows.[8]

These sectors rely heavily on industrial-zoned land due to their need for workshops, depots, storage areas and larger yard-based operations.

Across regional Western Australia, industrial demand is shaped by agriculture, civil contracting, logistics and mining support. Businesses commonly require larger lot sizes to accommodate machinery storage, freight vehicles and outdoor operational areas. Many towns have limited serviced industrial land available, which restricts expansion and can increase pressure on existing precincts. Older industrial areas often face constraints such as ageing internal roads, limited power capacity and drainage issues, which influence the type of development that can occur.

Major emerging trends in industrial land demand include:

- **Growth in renewable energy construction increasing demand for staging and contractor sites** - Regional WA is experiencing a rise in wind, solar and transmission projects. These projects require large temporary laydown areas, parking for heavy vehicles, container storage, and contractor yards. This demand often exceeds what existing industrial estates can supply, especially where land is fragmented or unserviced. Rural shires near transmission corridors or coastal wind zones, such as Dandaragan, are likely to see stronger short and medium-term pressure for flexible industrial lots during construction cycles.[9]
- **Expansion of agritech, food manufacturing and cold-chain logistics** - Agricultural regions are seeing more activity in farm automation, small-scale processing, grain handling innovations, and controlled-temperature storage. These industries rely on dependable power, modern sheds, and larger blocks of industrial land that can support machinery, intake systems, and hardstand. As supply chains tighten and producers seek local value-adding, regional industrial precincts with better servicing become more attractive.[10]
- **Shift toward larger, multi-use lots for logistics and contracting firms** - Freight operators, civil contractors and machinery service businesses require more space for fleet parking, equipment storage,

[7] AusPost (2025) Australia Post eCommerce Report 2025, accessed at https://ecommerce-report.auspost.com.au
[8] Just Commercial (2022) The growing Australian e-commerce market and its impact on warehouse demand, accessed at https://justcommercial.com.au/news/the-growing-australian-e-commerce-market-and-its-impact-on-warehouse-demand/
[9] Infrastructure WA (2025) Annual Report, accessed at https://preprod-iwa-public-files.s3.ap-southeast-2.amazonaws.com/public/2025-10/IWA%20Annual%20Report%202024-25.pdf
[10] Department of Agriculture, Fisheries and Forestry (2025), Snapshot of Australian Agriculture, accessed at https://www.agriculture.gov.au/abares/products/insights/snapshot-of-australian-agriculture

and workshop operations. Regional operators often prefer lots above 5,000 sqm because small industrial units cannot accommodate vehicle movements or outdoor working areas. As freight volumes increase through online retail and inter-regional transport, these larger lots will remain in high demand.[11]

- **Concurrent demand for smaller small industrial premise for "service commercial "activity** – at the same time as demand for larger lots to meet nationally significant freight and logistics requirements is growing, there is a concurrent demand for smaller lots and industrial precincts to meet population based service commercial activity. This includes the increased demand for "warehouse-lets" – small warehouse units with mezzanine office or showrooms of 800-1,250sqm GFA as part of multi-unit developments (based on 4x 1,000sqm unites on a 8,000-10,000sqm site)[12].
- **Increased demand for serviced industrial land with adequate power, water, and road access** - Contractors, manufacturing operators and agricultural service firms increasingly need reliable three-phase power, heavy-vehicle access and water infrastructure. Older regional industrial estates can struggle to meet these needs due to ageing internal roads or limited network capacity. Well-serviced lots become more competitive, and rural shires that address these gaps attract a wider range of operators.[13]
- **Rising freight and supply-chain activity driving storage and distribution needs** - Online retail continues to lift storage requirements in regional depots, courier yards and localised distribution points. CBRE estimated that over the next five years 1.7 to 1.8 million sqm of additional e-commerce-dedicated logistics space will be required to support the growth of online sales[14]. Even small increases in throughput can generate demand for additional hardstand, warehouse space, and truck-accessible lots. This trend supports steady industrial land absorption in regional towns with good highway access.[15]
- **Regional and semi-rural industrial markets share several consistent structural characteristics that shape demand -** Regional and semi-rural areas often show large amounts of zoned industrial land on paper, but much of it is not development ready due to servicing gaps, fragmented ownership, ageing estate infrastructure and limited small to mid-sized lots. Demand tends to come from local service industries, logistics operators and contractors who need 1,000–5,000 square metre sites with reliable power, drainage and vehicle access. Growth is influenced by both steady local needs and occasional surges linked to construction, mining or renewable projects, meaning shires with one well located and properly serviced estate are better positioned to capture and retain businesses.[16]

3.1.2 Local and Regional Context

Local industry composition shows a base of land-intensive users across transport, manufacturing, wholesale trade and utilities. Although employment numbers in these sectors are modest, they generate higher land requirements because they rely on workshops, storage facilities and operational yards.

Agriculture remains the Shire's dominant economic driver and supports a range of related activities such as machinery servicing, fabrication, storage and rural supplies. Growth in regional mining and renewable energy projects is increasing demand for contractor depots, equipment storage and laydown areas. Tourism-related activity in Jurien Bay and Cervantes also supports trade businesses that commonly locate in industrial precincts.

[11] Just Commercial (2022) The growing Australian e-commerce market and its impact on warehouse demand, accessed at https://justcommercial.com.au/news/the-growing-australian-e-commerce-market-and-its-impact-on-warehouse-demand/
[12] A 0.4 plot ratio is industry standard. However, this is not the ratio between the floor space and land are net of roads and services. To convert to Gross Developable are a further 30% of land is required.
[13] JLL (2025) Global Real Estate Perspective, accessed at https://www.jll.com/en-au/insights/market-perspectives/global
[14] Property Council (2025) Logistics space needed as online sales share climbs back to pandemic peak, accessed at https://www.propertycouncil.com.au/property-australia/logistics-space-needed-as-online-sales-share-climbs-back-to-pandemic-peak
[15] CBRE (2025) Australia's online sales share climbs back to Pandemic peak , accessed at https://www.cbre.com.au/press-releases/australia-s-online-sales-share-climbs-back-to-pandemic-peak
[16] Central Goldfields Shire Council (2021) Industrial Land and Supply Assessment and Strategy, accessed at https://www.centralgoldfields.vic.gov.au/About-Us/Governance-and-Strategy/Strategies/Industrial-Land-Demand-and-Supply-Assessment-and-Strategy

Transport, manufacturing, wholesale trade and utility services are the primary drivers of industrial land demand in regional areas, and these sectors strongly influence absorption patterns in the Shire of Dandaragan. Each of these industries requires relatively high levels of land per worker due to the need for workshops, storage yards, depots and heavy vehicle access. Because of this, even modest growth in employment or business activity can translate into noticeable additional land requirements.

Freight growth, expanding regional supply chains and continued construction activity across the Wheatbelt and Mid-West contribute to steady underlying demand. These drivers point to consistent square metres or more for logistics and contracting firms.

- Servicing standards that match modern industrial needs. This includes reliable three-phase power, water supply, drainage, wide internal roads and suitable turning areas for heavy vehicles.
- Road access that links directly to Brand Highway and Indian Ocean Drive and avoids residential areas.
- Plot ratio flexibility. Lower site coverage to allow for buildings, hardstand, truck parking and laydown areas.
- Staging options for future expansion. Precincts should be laid out so additional lots can be created as demand grows, especially in the Turquoise Coast future industrial area.
- Buffers from sensitive uses. Industrial land needs separation from housing, tourism areas and coastal recreation sites to reduce conflict.
- Clearly defined lot depth and frontage to support workshop-style development, usually with front-access sheds and deep lots for storage behind the building.
- Drainage and geotechnical capacity that supports hardstand-intensive industrial uses, especially for heavy industry, transport yards/depots and machinery storage.
- Ownership patterns that allow actual market availability. Avoid reliance on large privately held estates where land is sold but not brought to market.
- Marine-related parameters for harbour land, including access to boat ramps, lifting equipment and protected water for commercial operators.

4 DANDARAGAN INDUSTRIAL LAND NEED ASSESSMENT

This section provides a series of projections of the future need for industrial land in the Shire to 2036.

4.1 Methodology

4.1.1 Approach Statement

Econisis adopted an employment-led approach to developing industrial land projections. This seeks to establish different projection profiles for industrial-land related employment and then converting these jobs into floor space and occupied land now and over the next 20 years.

Scenarios

Three scenarios formed the basis of analysis on different drivers:

- **National Industry Trends -** application of national growth rates from Jobs and Skills Australia industry and employment projections. This model reflects wider national trends in industrial employment growth, adjusted for local drivers, though it is not connected to local employment or population.
- **Population-Led** - establishment of the current ratio of core industrial-land related employment to total population and application of this ratio forward based on WAPC WA Tomorrow population projections. This profile is effective at capturing industrial land demand drivers linked to local population servicing sector but is less responsive to industry and business drivers.
- **Industrial Employment Trends** – establishment of the historical rate of growth of industrial-land related employment by place of work and a continuation of this long-term growth rate into the future. This reflects long-term structural growth in industrial employment based on over 10-15 years' worth of data from Census periods but is less reflective on potential emerging

4.1.2 Conversion to Industrial Land

Industrial employment under each of the projections will be converted to industrial land:

- The application of workspace ratios from the WAPC Land Use and Employment Surveys. No survey results are available for the Shire of Dandaragan so average rates for industrial related land use from the Perth and Peel survey for 2022-24 will be applied, adjusted for regional application using data from the Chittering and Gingin 2021 surveys. This converts employment into occupied floor space. The ratios applied include:
  - 188.1 sqm per worker for Manufacturing.
  - 570.0sqm per worker for Storage and Distribution.
  - 117.5sqm per worker for Service Industries.
  - 291.8sqm per worker for other industrial-related activities.
- Adjustments have been made for vacancies to convert to total floor space. The average across the LUES surveys analyzed was 7.5% of floor space.
- Total floor space will be converted to industrial land using plot ratios. This will be based on national averages, adjusted where possible, for local occupied industrial supply data provided by the Shire of Dandaragan. For this study, a plot ratio of 0.4 has been applied.

4.1.3 Core Industrial-Related Industries

Industrial activity is utilized by a diverse range of industries and sectors in the economy. Regional WA specific transaction tables were developed by Econisis and the transaction relationship between the secondary sectors and the main sectors formed the basis of calculating the proportion of employment in each secondary sector that is attributable to industrial land.

Together these main and secondary sectors represent core industrial related employment and floor space. However, these sectors typically account for only a portion of total industrial land activity (50-80%). Ancillary sources of demand exist across all sectors of the economy. To reflect this an up-weighting is applied to the core industrial land demand to calculate total industrial land demand.

These industries have been validated based on the feedback to the industrial business and landowner survey as well as desktop research of major industrial land tenants/occupants.

4.1.4 Key Data Sources

The following data sources will be drawn upon to inform industrial land demand projections:

- ABS Census of Population and Housing
- ABS Estimated Residential Population and Population by Age and Sex
- ABS Count of Business Registrations
- ABS Building Approvals
- REMPLAN
- WAPC LUES
- WAPC WA Tomorrow
- Jobs and Skills Australia
- Results of Shire of Dandaragan survey
- Current land supply data from the Shire of Dandaragan and other formal sources

4.1.5 Supply Validation

This section outlines all industrial zoned land across the Shire and provides a summary of lot availability, subdivision status and current take up. This land supply profile is a key input to the industrial needs assessment, as it establishes the amount of land that is available for occupation or future development.

When assessing future demand, the modelling focuses on subdivided industrial land rather than total zoned land. Total zoned land often includes large parent titles, unserviced areas, Crown land or land constrained by infrastructure and environmental factors. These areas cannot be absorbed by the market in their current form. Subdivided land represents the portion that is serviced or service-ready, in lot format, and capable of being taken up by businesses. As a result, it provides the most accurate measure of real, usable industrial supply in the short to medium term.

Current Industrial Land in the Shire includes:

- **Cervantes – Seville Industrial Area -** The Seville precinct contains 21 hectares of industrial-zoned land, of which 8 hectares have been subdivided. It includes 27 lots in total, comprising 21 industrial lots and 6 lots for industrial use within a parks and recreation reserve. Only one lot remains vacant. Lot sizes are generally around 2,000 square metres, ranging between 1,700 and 2,900 square metres. This precinct is close to full take up with limited remaining capacity.
- **Jurien Bay – Carmella Industrial Area** - The Carmella industrial area contains 10 hectares of fully subdivided industrial land across 38 lots, all of which are occupied. Typical lot sizes are around 2,000 square metres, with a range from 1,300 to 3,000 square metres. A small number of larger sites between 6,000 and 8,000 square metres provide capacity for higher-intensity uses. This area is fully absorbed with no vacant industrial lots.
- **Jurien Bay – Coalseam Industrial Area** - Coalseam is the Shire's largest industrial precinct, with 96 hectares zoned for industrial purposes and 11 hectares subdivided. The area contains 43 lots, all of which are sold. Eleven lots remain vacant but are held by private owners. Most lots are around 2,000 square metres, with two sites closer to 3,000 square metres. Four recently created lots are 1,000

square metres. Although more vacant land exists here than elsewhere, ownership patterns mean land is not currently available on the market.

- **Badgingarra Industrial Area -** The Badgingarra precinct contains 6.7 hectares of subdivided industrial land across 12 lots, of which 6 remain vacant. Lot sizes range from 2,500 to 4,200 square metres. This location provides the Shire's largest supply of unoccupied and readily developable lots.
- **Dandaragan Industrial Area -** The Dandaragan precinct comprises 5.4 hectares of subdivided industrial land over 7 lots, all of which are occupied. Five lots range between 1,300 and 2,300 square metres, which includes the Shire's works depot occupies a 1.02-hectare lot alongside an additional 1.42 hectares of Shire land. There is no vacant industrial land remaining in this precinct.
- **Turquoise Coast Industrial Area (Future) -** A future industrial precinct of approximately 24 hectares has been identified but is not yet subdivided or serviced. No lots exist at this stage. This area represents a potential medium-term industrial expansion opportunity. The area has a proposed 25 industrial lots and 18 light industrial lots

The Shire also has industrial land associated with harbour and maritime activities. These precincts are specialised in nature and are not intended to meet general industrial land demand.

- **Cervantes Marine Services Area** - This 7.2-hectare area consists of six Crown reserve allotments used for limited marine-related activity, including the sailing club. The land is zoned for marine services but has minimal industrial development.
- **Jurien Harbour Reserve** - The Jurien Harbour precinct covers 50.8 hectares, with an estimated developable footprint of around 12 hectares. The remaining land is linked to harbour operations, coastal interfaces or environmental constraints. This area provides long-term potential for marine, commercial and industrial-marine activities subject to strategic planning.

For the purpose of this assessment, data from the Shire of Dandaragan and DLPH has identified 41 hectares of occupied and vacant industrial land across the following locations in the Shire:

- Cervantes – Seville Industrial Area – 8ha
- Jurien Bay - Carmella Industrial Area – 10ha
- Jurien Bay - Coalseam Industrial Area – 11ha
- Badgingarra Industrial - 6.7ha
- Dandaragan Industrial Area - 5.4ha

There is a total of 41 ha of developed and occupied industrial land within the Shire with approximately 1.5ha of vacant industrial land across these localities in 2025. This includes 18 vacant lots, 11 of which were recently created and sold.

4.2 Industrial Employment Analysis

The primary industrial sectors across Dandaragan, Coorow and Gingin (Sub-Regional Area) include Manufacturing, Wholesale Trade and Transport, Postal and Warehousing.

Manufacturing employs 160 workers, Wholesale Trade employs 250 workers and Transport, Postal and Warehousing employs 114 workers, giving a combined total of 524 workers. This represents about 12.4 % of the total workforce in the assessment area.

Dandaragan holds a varied share of the industrial workforce in the Sub-Region accounting for 23.8% of Manufacturing jobs, a similar share of Wholesale Trade jobs at 28.8%, and a higher share of Transport, Postal and Warehousing jobs at 44.7%. In total Dandaragan accounts for 31.7% of all industrial jobs across the three LGAs. These shares show that while some industrial sectors are evenly distributed across the region, transport, postal and warehousing activity is strongly centred in Dandaragan.

Figure 9 Number of Workers by Primary Industrial Sectors, Dandaragan LGA & Sub-Region, 2021[17]

Econisis has assessed four secondary sectors because these industries also likely rely on industrial land for activities such as machinery and equipment storage, off farm product handling, construction materials storage, public works depots and essential utility operations, which link them partly to industrial land use in the region.

The secondary sectors include Agriculture, Forestry and Fishing, Electricity, Gas, Water and Waste Services, Construction and Public Administration and Safety.

Together these sectors employ 2,141 workers, which accounts for about 37.1% of all jobs in these industries across the three LGAs. Of these workers, Dandaragan accounts for 24% of Agriculture, Forestry and Fishing jobs, 55.6% of utility jobs, 51.4% of Construction jobs and 42.1% of Public Administration and Safety jobs. Overall, Dandaragan accounts for about 31.2% of these jobs across the Sub-Region.

When the primary and secondary sectors are combined, primary and secondary industrial sectors account for 2,665 jobs across the Shires of Dandaragan, Coorow and Gingin, equal to 59% or almost 6 in 10 of the total jobs. Gingin held the largest share of industrial sector jobs accounting for over 55% of jobs in the 3 LGAs, followed by Dandaragan (35.9%), and Coorow (8.9%). This shows that Dandaragan holds a larger share of industrial employment than the Coorow, but smaller than Gingin, reflecting a strong concentration of activity across both primary and secondary sectors.

[17] ABS (2021), Working Population Profile, accessed at https://www.abs.gov.au/census/find-census-data/community-profiles/2021/LGA52590

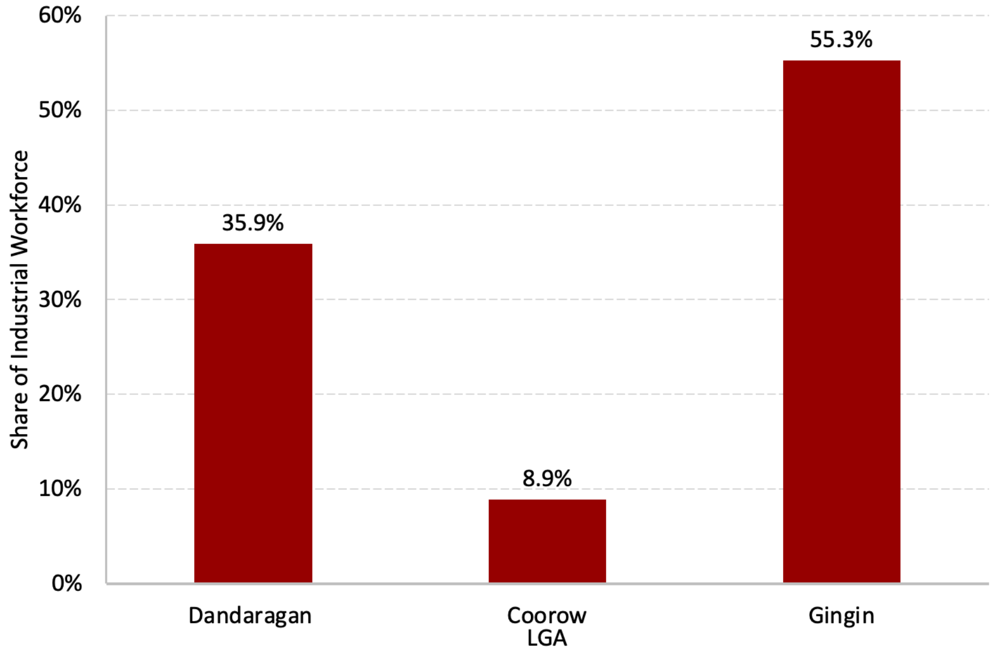

Figure 10 Share of Industrial Workforce (Primary and Secondary Sectors) by LGA, 2021[18]

4.2.1 Industrial Land Demand Scenarios

Based on the methodology outlined above, Econisis estimates that in 2025, there was demand for between 35.9ha and 39.9ha of occupied industrial land in the Shire. This is expected to grow to reach between 39.5ha and 61.8ha of industrial land demand in 2036. This is illustrated below.

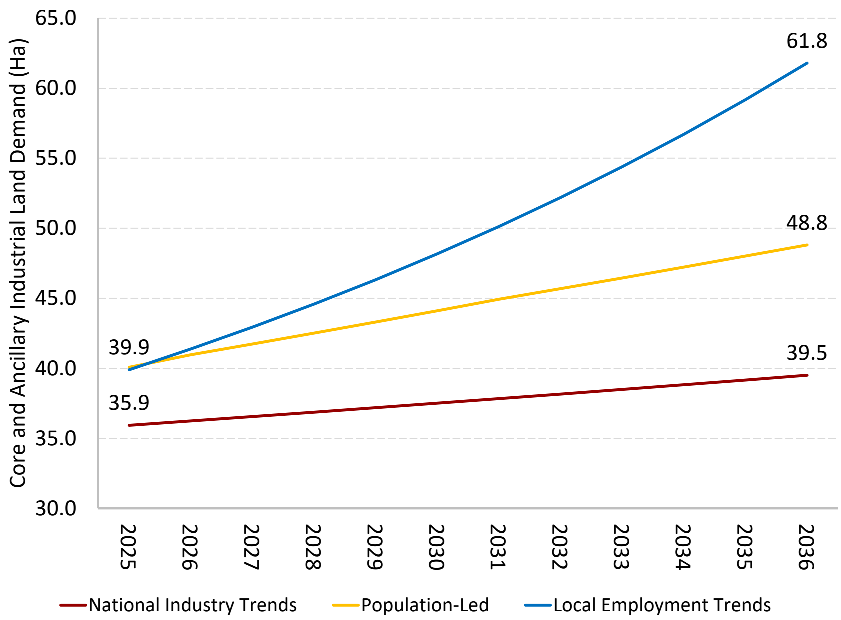

Figure 11 Core and Ancillary Industrial Land Demand (ha) by Scenario, Dandaragan (S), 2021 to 2036

In comparison to current supply in 2025/26, this these Scenario estimates are broadly in line with projected demand.

[18] As Above.

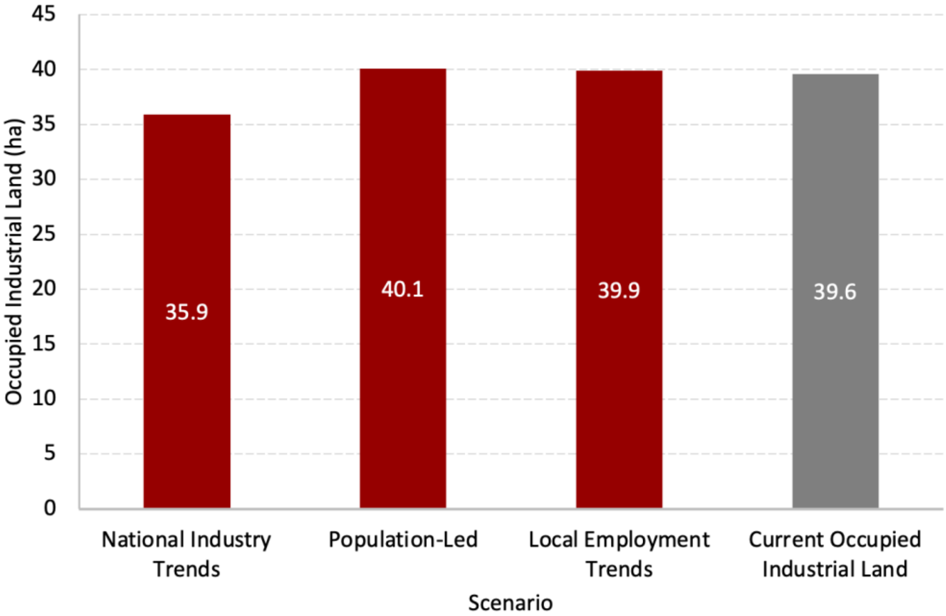

Figure 12 Industrial Land Demand Projection Scenarios and Current Occupied Land, Dandaragan (S), 2025

If growth rates are rebased to the current occupied supply of 39.6ha, then it is projected that industrial land demand will grow from current supply of 39.6ha to between 43.5ha and 61.3ha by 2036.

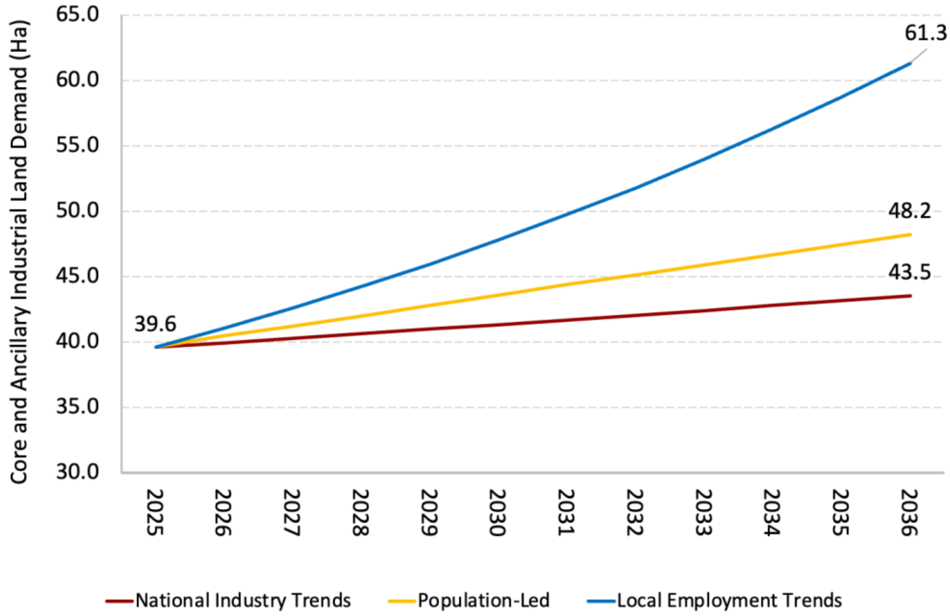

Figure 13 Rebased Industrial Land Demand Projection Scenarios, Dandaragan (S), 2025 to 2036

4.2.2 Take Up Rates

Annual take up projections based on estimated demand into the future indicate rates varying between 0.3ha per annum and 1.5ha per annum in 2026. While take up rates are projected to be consistent in the National Industries Trend and Population Led scenarios, they are expected to climb annually, under the Local Employment Trends scenario, reaching 2.4ha per annum by 2036.

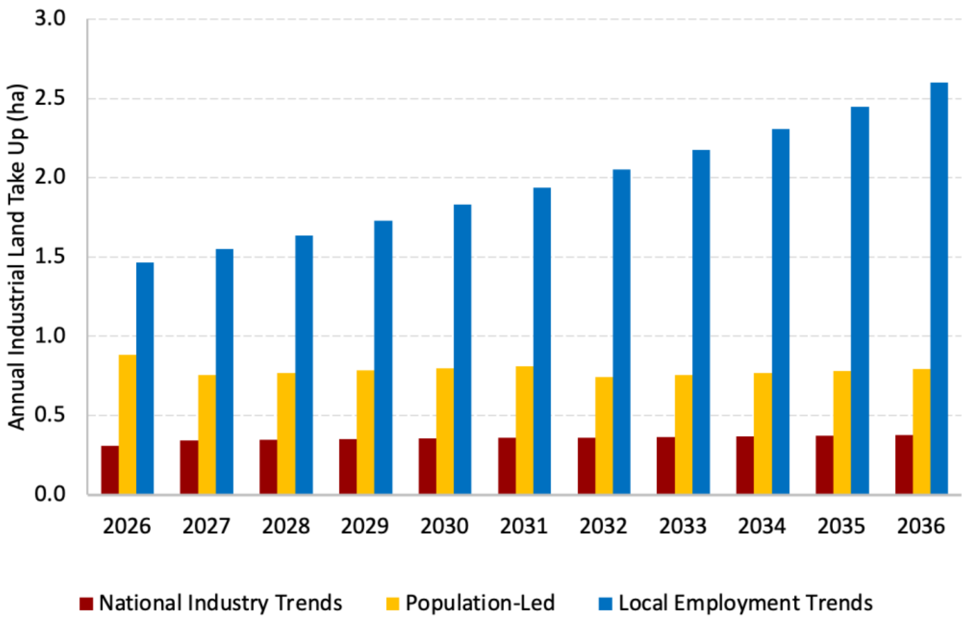

Figure 14 Annual Industrial Land Take Up Rates, by Scenario, Dandaragan (S), 2025 to 2036

The table below shows a notional allocation of a projected 2.4 hectares per annum (24,000sqm) industrial land take-up, allocated to four lot-size bands. These figures represent occupied industrial land only and are derived using representative average lot sizes informed by the local land inventory. The allocation is intended to reflect likely occupier demand patterns (strongest demand in the 2,000-5,000sqm band) while also recognising smaller workshop/trades lots and a reduced requirement for larger, land-intensive lots.

Table 3 Allocation of 2.4ha Per Annum Industrial Land Take-up

Lot size band (sqm)	Allocation (%)	Allocated area (sqm)	Representative avg lot size (sqm)	Estimated number of lots
0-1,000	20%	4,800	1,000	4.8
1,000-2,000	20%	4,800	1,500	3.2
2,000-5,000	40%	9,600	2,500	3.8
>5,000	20%	4,800	7,000	0.7
Totals	**100%**	**24,000**	**-**	**12.5**

On the basis of the representative averages used, the 2.4 ha per annum equates to approximately 12.5 lots per year.

To deliver 2.4 ha of occupied industrial land will require an estimated zoned area of 31,200sqm (3.12 ha) after allowing for an additional 30% for roads, services and buffering.

5 ECONOMIC JUSTIFICATION FOR LAND AVAILABILITY PROJECT CONTEXT

This section estimates the contribution to the Shire of additional industrial land being zoned, serviced and occupied and applies cost benefit analysis techniques to quantify this value.

5.1 Economic Valuation Method

The economic valuation method of potential new industrial land has been assessed applying a Cost Benefit Analysis methodology. This approach is in line with both the Western Australia and Australian Government techniques and is regarded as a robust evaluation of a development's economic contributions.

5.1.1 CBA Steps

A CBA is the most commonly used, and most comprehensive, of the economic evaluation techniques. Essentially, a CBA compares the monetised benefits and costs of a project or development to evaluate the value for money and net socio-economic contribution of a project.

The CBA steps include:

- Identify the quantifiable benefits that can be monetised;
- Calculate the value (in monetary terms) of the quantified incremental benefits and costs in present value (PPV) terms using the discount rates;
- Evaluate the differences between the present values of costs and benefits over the assessment period, calculating net present values (NPV), proportional differences and benefit cost ratios (BCR); and
- Undertake a sensitivity assessment and scenario testing.

For the purpose of this assessment, the present value of the economic value added is the primary focus of this approach.

5.1.2 Discount Rates

Discounting is the reverse of adding (or compounding) interest. It reduces the monetary value of future costs and benefits back to a common time dimension – the base date. Discounting satisfies the view that people prefer immediate benefits over future benefits (social time preference). Recognising the potential for multiple audiences for the business cases, real discount rates of 4, 7 and 10% have been applied. This complies with recommendations set by the Office of Impact Analysis (OIA)[19] at the Federal Government level and with the WA Government Business Case Template[20].

All values calculated are real in 2024/25 dollars.

Modelling of quantifiable benefits are developed over a 10-year timeframe to reflect the duration of projections of industrial land demand to 2036.

5.1.3 Calculating Gross Value Added

Gross Value Added is the most relevant indicator of the contribution of a business or industry to the local and regional economy. The Australian Bureau of Statistics (ABS) defines GVA as:

> *the value of output at basic prices less the value of intermediate consumption at purchasers' prices. These inputs exclude costs such as wages, salaries, superannuation payments and the cost of capital assets such as machinery and equipment[21].*

[19] OIA (2024) CBA Guidance Note accessed at https://oia.pmc.gov.au/resources/guidance-assessing-impacts/cost-benefit-analysis
[20] WA Government (2024) Business Case template accessed at https://www.wa.gov.au/government/publications/business-case
[21] ABS (2023) Intermediate Use and Output Ratios in the Australian Economy, accessed at https://www.abs.gov.au/articles/intermediate-use-and-output-ratios-australian-economy#:~:text=Gross%20Value%20Added%20(GVA)%20on,of%20intermediate%20inputs%20and%20Output.

Gross value added therefore excludes products and service inputs (the value of which are counted for the industry that produced them), showing only the share of the total production value of a business or industry that can attributed directly to the efforts of that business.

The calculated Gross Value Added that can be attributed that the occupancy by an organisation of a non-residential building, the floorspace of the building first needs to be converted into the average number of employees. This is done using measures referred to as workspace ratios – representing the number of square metres (sqm) of Gross Floor Area (GFA) that is attributed on average to an individual worker.

GVA per worker is referred to a worker productivity. Econisis has derived worker productivity estimates utilising REMPLAN data. This is summarised below for all industries.

Table 4 Worker Productivity, by Industries, Shire of Dandaragan[22]

Industry sector	GVA	Jobs	GVA per Worker
Accommodation & Food Services	$13,113,353	147	$89,206.5
Administrative & Support Services	$2,780,564	37	$75,150.4
Agriculture, Forestry & Fishing	$103,192,261	418	$246,871.4
Arts & Recreation Services	$2,610,049	24	$108,752.0
Construction	$41,334,417	230	$179,714.9
Education & Training	$13,757,264	109	$126,213.4
Electricity, Gas, Water & Waste Services	$6,953,241	13	$534,864.7
Financial & Insurance Services	$8,241,292	13	$633,945.6
Health Care & Social Assistance	$12,243,390	88	$139,129.4
Information Media & Telecommunications	$1,337,948	3	$445,982.6
Manufacturing	$6,780,700	34	$199,432.4
Mining	$168,999,651	243	$695,471.8
Other Services	$4,758,348	51	$93,300.9
Professional, Scientific & Technical Services	$1,925,158	10	$192,515.8
Public Administration & Safety	$19,353,494	91	$212,675.8
Rental, Hiring & Real Estate Services	$47,911,524	22	$2,177,796.5
Retail Trade	$14,407,572	145	$99,362.6
Transport, Postal & Warehousing	$9,073,917	48	$189,039.9
Wholesale Trade	$4,471,824	20	$223,591.2
Total	**$483,245,967**	**1,746**	**$276,773.2**
Primary and Secondary Industrial Sectors Only			**$223,840.6**

Econisis has calculated the weighted average worker productivity, based on the primary and secondary industrial sectors. This is estimated at $223,840 or approximately $53,000 less than the whole of economy worker productivity average of $276,773.

This means that each additional industrial job created and supported in the Shire of Dandaragan by new industrial land will support over $223,000 in additional Gross Value Added.

The Shire's economy is dominated by primary and resource sectors: Mining and Agriculture contribute the largest shares of gross value added and exhibit substantially higher GVA per worker than other industries. By contrast, Transport/Postal & Warehousing, Manufacturing and Wholesale Trade are the principal users of industrial land and therefore drive lot demand, even though their GVA and productivity are lower.

[22] REMPLAN (2025) Employment and Gross Value Added Data, Shire of Dandaragan accessed at https://app.remplan.com.au/dandaragan/economy/

5.2 Value Added by Scenario

Based on the 7% discount rate, Econisis has applied the worker productivity estimate to the net increase in industrial employment under each of the three scenarios and calculated the net present value over 20 years. This is based on the take up rate of industrial land, cumulative over the assessment period.

This provides an estimate of the present value of GVA that can be supported over 10 years if industrial land demand is met.

Overall, meeting industrial demand in the Shire of Dandaragan has the potential to add a further $36.61m to $173.41m over a decade to the local economy (present value at 7%), depending on the demand scenario.

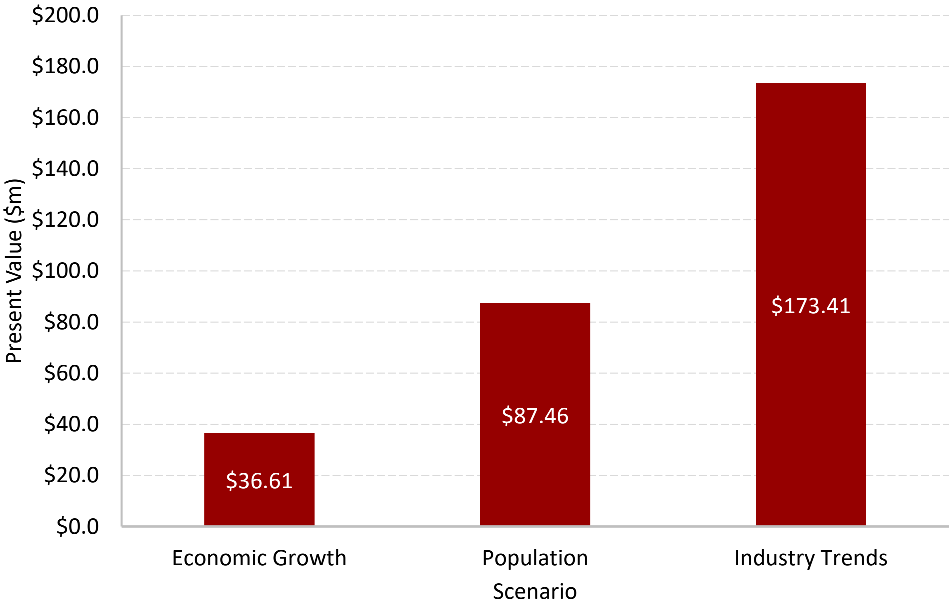

Figure 15 Present Value of GVA Contribution, by Industrial Employment Scenario

The strongest contributors to the value added

5.3 Unit Value

5.3.1 Total Economic Value per Hectare

Alternatively, the economic value contribution of additional value added can be calculated on a per hectare basis. Applying the same development assumptions as outlined in section 4.0 and average weighted workspace ratios (approximately 290sqm per worker), Econisis estimates that one hectare of industrial land can accommodate 13.7 workers. Based on this workforce, an additional hectare of industrial land in the Shire of Dandaragan can generate $24.60m in Gross Value Added for the Shire of Dandaragan economy over 10 years (present value at 7%).

5.3.2 Attribution Rate Adjusted

When applying the above values, it's important to understand the extent to which the contribution can be attributed to the development of industrial land versus the activity of the business that occupies floor space on that land.

Typically, Econisis recommends that a 25% attribution rate is applied to reflect the enabling role of industrial land creation in the generation of industrial-related economic activity. A further 25% can be attributed to the construction of built form on the land and a final 50% can be attributed to the activity of the business itself.

Based on this, Econisis estimates that the unit value of one hectare of additional industrial land (zoned, serviced and occupied) that can be attributed to the land development itself is $6.2m over 10 years (present value at 7% discount rate).

Based on this present value and allowing for the achievement of a 2.0 benefit cost ratio, this would imply a notional land development budget of $3.1m (present value at 7%) including ongoing maintenance value of 1% of capital value per annum.

APPENDIX A – PROJECT REALTED POPULATION IMPACTS

Major Projects

The Shire of Dandaragan is the focus of significant major project investments over the next 5-10 years. Data provided by the Shire indicates a diverse range of renewable energy, mining and resources, agriculture, tourism and State Government projects and investments.

A review of these project indicates that:

- 12 solar and windfarm projects
- 9 State Government infrastructure projects
- 9 Intensive Agriculture projects
- 6 Mining and Gas projects
- 5 Tourism projects

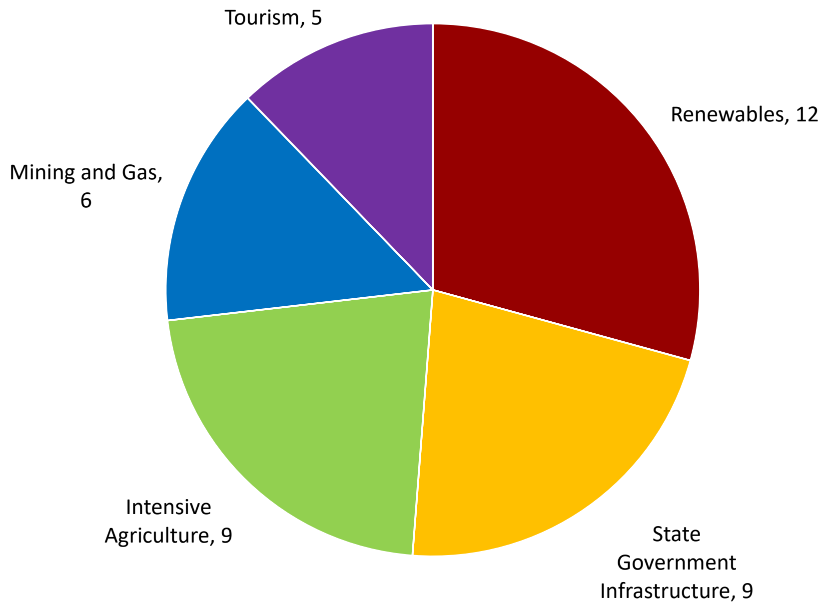

Figure 16 Major Projects, as of January 2026

Thess project vary considerably in value and include:

- Yandin Wind Farm - ~$400m
- Badgingarra Wind Farm - ~$315m
- Emu Downs Wind Farm - ~$185m
- "Clean Energy Link – North" Transmission Upgrade - ~$584m
- WA Agricultural Supply Chain Improvement Program (ASCIP) - ~$200m
- Westpork "Moora" Piggery (Agaton Farms) - ~$21-28m
- Iluka Cataby Mineral Sands Mine - ~$270m
- Jurien Bay Foreshore & Youth Precinct (Upgrade) - ~$3m

There is also major projects in the list that are not within the Shire but are expected to have an impact on the Shire's population. This includes Caravel Copper Project between Wongan Hills & Calingiri with Stage 1 valued at up to $1.5b.

These projects are expected to generate employment during both the construction and operational phase which will impact the population growth profile of the Shire in the short-to medium term.

Industrial Land Modelling.

Econisis has applied the Geographic project based population scenario to the Dandaragan Industrial Land Needs Model as described in the technical report. This has used the population centric scenario as the base and replaced the WA Tomorrow scenario with that of Geographia. No other changes were made to the model apart from the substitution of this Project-Related Population Impact Profile.

The results of the modelling are illustrated below.

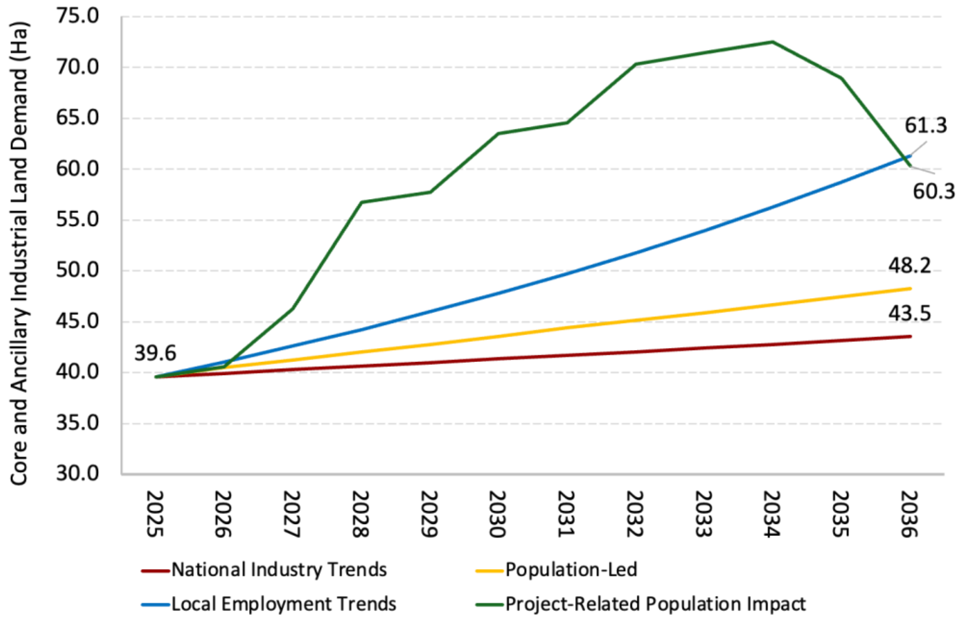

Figure 17 Rebased Industrial Land Demand Projection Scenarios, Dandaragan (S), 2025 to 2036

The growth profile of the Population-Related Project Impact scenario sees total rebased industrial land demand growth rapidly to reach approximately 73ha by 2034. However, this then declines in response to the completion of a number of major projects and the cessation of construction phases resulting in a decline in population post this time.

This results in the demand for industrial land falling to similar levels to that of the Local Employment Trends scenario at approximately 60-61ha of industrial land.

Note this is based on the net developable area and excludes roads, infrastructure and servicing. Generally a weighting of 30% is required atop that of the net developable area to estimate to gross developable area of an industrial zone.

Conclusions

The Project-Related Population Impact scenario provided by the Shire from Geographia highlights the challenge of accommodating the need for industrial land in a market where major projects and associated construction phase employment can create significant volatility. This is evident in the annual industrial land take up under the scenario.

While the take up is more rapid under the Project-Related Population Impact Scenario than the trend based scenarios, post 2034 sees a rapid vacation of occupied industrial land to levels comparable with the Local Employment Trend Scenario.

This validates the Local Employment Trend Scenario being utilized as the preferred scenario when estimating the requirement for industrial land, as it not only ends in a similar position to the project-Related Population Impact scenario, but also accommodate a larger trend based take up.

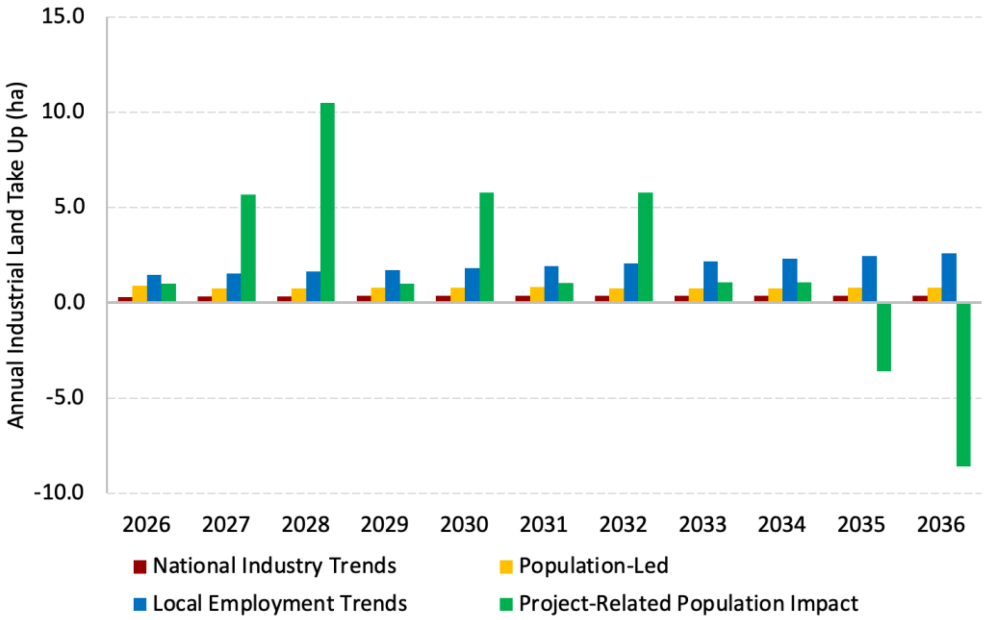

Figure 18 Annual Industrial Land Take Up Rates, by Scenario, Dandaragan (S), 2025 to 2036

Such a take up requires the availability of zoned and serviced land so that opportunities associated with major projects can be leveraged and accommodated in the short-term.

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