



BREAK O'DAY INDUSTRIAL LAND STUDY

Final Report

Break O'Day Industrial Land Study

This report has been prepared by the team at REMPLAN

July 2026

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1. EXECUTIVE SUMMARY

The Break O'Day Industrial Land Study provides Council with a local evidence base to guide the future supply, zoning, servicing and delivery of industrial and employment land. It responds to constrained industrial land supply in St Helens, limited activation of existing land in Fingal, growth pressures in Scamander / Beaumaris, and the need to align future industrial land planning with local demand, infrastructure capacity and state and regional planning directions.

The central finding is that Break O'Day does not require a single large industrial land release. Future demand is likely to be modest, incremental and place-specific. It is expected to be driven mainly by trades, storage users, repair and maintenance services, construction-related businesses, small-scale production, food and beverage activity, aquaculture support, local service businesses and niche industrial users. The priority is therefore not simply to increase the amount of zoned industrial land, but to ensure that future land is well-located, capable of being serviced, flexible in format and realistic for local businesses to occupy.

The existing industrial land supply is constrained. St Helens is the municipality's primary industrial precinct and is operating at or near functional capacity, with only a small number of vacant lots remaining and limited opportunities for expansion due to surrounding residential, environmental, flood and infrastructure constraints. Fingal contains existing industrial-zoned land, but currently functions more as a low-activity land reserve than an active industrial precinct. Scamander / Beaumaris and St Marys do not have dedicated industrial land, despite Scamander / Beaumaris being the fastest growing township area in the municipality and St Marys playing a local service role for surrounding rural areas.

Economic and employment analysis confirms that Break O'Day's economy is increasingly service-oriented, but that several locally important sectors still generate practical demand for industrial and employment land. Construction, repair and maintenance, transport and storage, food and beverage production, aquaculture, agriculture-related activity and selected manufacturing all require some combination of workshops, yards, storage, depots, servicing areas, production space or separation from sensitive uses. Employment forecasts point to stable-to-modest growth, reinforcing the need for a staged and targeted land response rather than a large-scale industrial expansion program.

Stakeholder engagement reinforced these findings. Businesses and landowners identified the need for smaller, lower-risk and development-ready premises, including small sheds, workshops, storage units, yards and flexible spaces. Infrastructure was raised as a critical barrier, particularly stormwater, digital connectivity, power reliability, servicing costs and road access. Cost, workforce availability and the difficulty of delivering industrial premises on a site-by-site basis were also identified as constraints on business growth.

A multi-criteria analysis, Council officer review and staged site filtering process identified five strategic investigation areas:

- **St Helens Industrial Estate Expansion:** the priority near-term opportunity to expand the municipality's main industrial precinct, with approximately 13.5 hectares of potentially developable land across western and eastern expansion areas.
- **Scamander Service and Industrial Precinct:** a priority future industrial precinct within a broader government-owned landholding, with an initial 5 to 10 hectare development envelope recommended for further investigation.
- **St Helens South Expansion:** a conditional opportunity for low-activity storage, depot or service uses, subject to environmental, wastewater, stormwater and access considerations.
- **St Marys:** a conditional local service option that may support small workshops, storage, trade or local enterprise uses if demand and servicing feasibility are confirmed.
- **Fingal Outer West:** a long-term strategic investigation area linked to highway, rail and energy infrastructure, to be monitored for larger or specialised industrial opportunities rather than rezoned in the near term.

The study recommends a staged and trigger-based planning pathway. The immediate priority is to progress a staged Light Industrial Zone expansion at St Helens, supported by precinct structure planning, servicing investigations and design principles. Scamander should be advanced as a future General Industrial precinct within a defined development envelope, subject to landholder agreement, technical investigations and alignment with the Scamander-Beaumaris Structure Plan. St Helens South and St Marys should be retained as conditional opportunities, while Fingal Outer West should be recognised as a long-term strategic investigation area for potential anchor uses.

Across all future industrial land, rezoning should not be relied on as the only delivery mechanism. Council should support land release with precinct design principles, servicing and funding plans, early agency engagement and coordinated stormwater, access, utility and telecommunications planning. This approach will allow Break O'Day to grow its industrial land supply in step with demand, while improving the quality, flexibility and deliverability of employment land across the municipality.

2. INTRODUCTION

2.1 Purpose

The purpose of this study is to evaluate the current and future need for industrial and employment land in the Break O'Day Local Government Area (LGA). The study provides an evidence base to guide future industrial land planning, recognising that demand is likely to be modest, incremental and place-specific rather than driven by large-scale industrial expansion. It identifies the capacity and constraints of existing industrial areas, considers the role of different townships, and assesses future land options that could support local enterprise, trades, storage, light industry, service businesses and emerging niche sectors. The findings are intended to inform future planning scheme amendments, infrastructure investigations, precinct planning and implementation priorities, ensuring industrial land supply is appropriately located, capable of being serviced, and aligned with Council's economic development, community wellbeing and land use planning objectives.

2.2 Background

The Break O'Day region is at a pivotal moment in planning for the future of its industrial land. Due to shifting economic trends, emerging opportunities, and the evolving employment landscape, Council is aiming to establish a clear evidence base to guide sustainable industrial land development in Break O'Day. This study aims to place Break O'Day LGA in the best position, to meet demand, support residents' well-being and liveability, and provide opportunities for emerging and expanding sectors and entrepreneurship, in terms of industrial land and activity.

In this context, industrial land in Break O'Day plays a vital role in accommodating a wide range of activities, including manufacturing, construction, logistics, and a growing mix of service-based businesses. While traditional industrial users remain important, there is increasing demand from smaller, more flexible operators—such as trades, repair services, and even recreational or creative enterprises—seeking affordable space with suitable access and servicing. This diversity in industrial land use underscores the need for adaptable planning frameworks that support both economic growth and evolving business models.

A forward supply of industrial land is important to ensure sufficient land is available to support expanded or new activities and incentivise diversity within industry. The region's industrial precincts, in St Helens and Fingal, support a variety of businesses, but land availability remains a key constraint in St Helens and demand is a limiting factor in Fingal. A lack of available, serviced industrial land could hinder investment and growth, especially in industries requiring flexible and scalable spaces.

2.3 Council Objectives

Break O'Day Council commissioned this study to establish a clear, evidence-based understanding of the municipality's industrial land needs and translate that understanding into practical planning guidance. Council's central objective is to ensure an adequate forward supply of appropriately zoned, serviced and developable employment land that supports business growth, economic diversification, local employment and community wellbeing.

The study responds to Council's recognition that existing industrial areas, particularly in St Helens and Fingal, face capacity, servicing and activation constraints. It also recognises that future demand may not be limited to traditional industrial activities, but may include smaller and more flexible employment uses such as trade services, storage, light manufacturing, food and beverage production, creative industries and other local enterprise activities.

The study is intended to provide Council with a defensible local evidence base to guide future planning scheme amendments, infrastructure priorities, precinct planning and engagement with regional and state-level planning processes. This is particularly important given the broader strategic context, including the statewide industrial land study and the review of the Northern Tasmania Regional Land Use Strategy.

2.4 Project Scope and Objectives

The Break O'Day Industrial Land Study has been commissioned to provide a practical evidence base to support future industrial land planning and economic development within the Break O'Day municipality. The study responds to the region's evolving economic landscape and aims to help Council manage industrial land supply, support local enterprise, facilitate employment diversification and plan for sustainable growth.

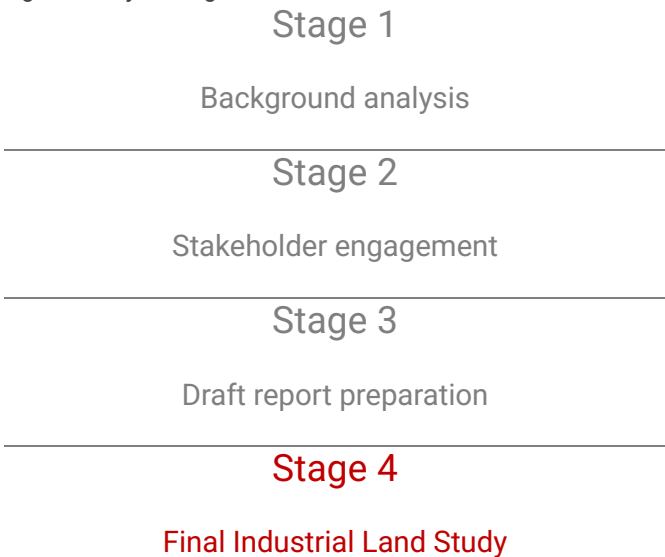
The original objectives of the project were to:

- Assess the current supply and constraints of industrial land in St Helens, Fingal and other relevant areas.
- Identify key economic trends and industries likely to influence future demand.
- Forecast future industrial land requirements across different sectors.
- Explore options for brownfield redevelopment and intensification.
- Recommend suitable areas for industrial land expansion.
- Provide advice on planning controls, infrastructure and incentives to support development.
- Align the study with broader goals around economic growth, sustainability and liveability.
- Ensure findings reflect local knowledge through targeted stakeholder engagement.

These objectives are addressed through the economic analysis, infrastructure review, industrial land audit, stakeholder engagement findings, site assessment and recommendations that follow. As the study progressed, the analysis indicated that Break

O'Day's future industrial land needs are best understood as modest, incremental and place-specific, rather than as a single quantified municipal land requirement. The report therefore focuses on identifying realistic land options, staged planning pathways and implementation actions that can support Council decision-making over time.

Figure 1 Project stages



3. STRATEGIC CONTEXT

Key Takeaways

- State and regional planning directions support a local place-specific approach, including maintaining industrial capacity in St Helens, investigating future options around Scamander/Beaumaris, and recognising constraints and longer-term opportunities around Fingal.
- Broad industrial trends such as e-commerce, advanced manufacturing, low-carbon industry and circular economy activity are relevant, but are unlikely to drive large-scale industrial land demand in Break O'Day.
- Local demand is more likely to come from trades, storage, construction services, repair and maintenance, small-scale production, tourism-supporting businesses, primary industry value-adding and other flexible local enterprises.
- Infrastructure and environmental constraints will strongly shape where future industrial land can realistically be delivered, particularly in relation to servicing, road access, stormwater, flood risk, landscape values and sensitive interfaces.

3.1 Planning and Policy Framework

Land use and development in Tasmania is guided by a statewide planning system that aims to provide consistency while allowing local conditions to be recognised. The Land Use Planning and Approvals Act 1993 provides the legislative foundation for the system, supported by the Tasmanian Planning Policies, Regional Land Use Strategies and the Tasmanian Planning Scheme.

The Tasmanian Planning Policies set high-level directions for land use planning across the state. These directions are implemented through both the Tasmanian Planning Scheme and the Regional Land Use Strategies. For Break O'Day, the key regional document is the Northern Tasmania Regional Land Use Strategy (NTRLUS), which guides land use and development across Northern Tasmania to 2032, including settlement planning, economic development, infrastructure coordination and environmental management.

The Tasmanian Planning Scheme provides the statutory planning framework for land use and development. It is made up of the State Planning Provisions, which apply consistently across Tasmania, and a Local Provisions Schedule for each municipal area. The Break O'Day Local Provisions Schedule came into effect in August 2023 and applies the planning scheme to local land use, zoning and development matters.

The NTRLUS is currently being reviewed, which means future industrial land planning in Break O'Day will need to align with an evolving regional planning framework. This study supports that process by identifying the current and future need for industrial and employment land in Break O'Day. It provides an evidence base to guide potential changes to the Local Provisions Schedule, ensuring that any new or expanded industrial land is strategically justified, capable of being serviced, compatible with surrounding land uses and responsive to local economic and infrastructure needs.

National to Local Strategies

The Tasmanian Planning Policies (TPPs) provide detailed principles that the NTRLUS must apply to land use planning for the State. TPPs direct the contents and form of the TPS. This report focuses on the TPS, NTRLUS and the following relevant strategies:

- Statewide Industrial Land Study 2025
- Tasmanian Advanced Manufacturing Action Plan 2024
- Tasmanian Integrated Freight Strategy
- Break O'Day Strategic Plan 2022
- Break O'Day Economic Development Strategy
- Break O'Day Land Use and Development Strategy
- Strategic Asset Management Plan 2020-2029
- Community Infrastructure Design Guidelines 2013
- Access and Inclusion Action Plan 2024-2026
- St Helens Township Plan 2022-2025
- Fingal Township Plan 2022-2025
- Draft Scamander-Beaumaris Structure Plan

Together, these strategies provide the broader policy context for industrial land planning in Break O'Day. They point to a consistent need for industrial land that supports economic diversification, local employment, infrastructure efficiency, land use compatibility and community and environmental values.

At the state and regional level, the Northern Tasmania Regional Land Use Strategy remains a key statutory planning reference and is currently under review, with the emerging regional framework expected to shape future Local Provisions Schedule amendments and rezoning decisions. The Statewide Industrial Land Study 2025 also provides specific direction for Break O'Day, including investigating light industrial rezoning at Scamander and Beaumaris to support population growth, addressing flood constraints at Fingal, and maintaining local industrial capacity at St Helens while balancing residential interfaces. These directions align closely with the place-specific approach taken in this study.

Local strategies reinforce this direction. The Break O'Day Economic Development Strategy supports diversification and local employment growth, the St Helens and Fingal Township Plans identify community priorities for infrastructure, servicing and local activity. This study builds on that policy context by providing a local evidence base to guide future land use decisions, infrastructure priorities and potential amendments to the Break O'Day Local Provisions Schedule.

3.2 Strategic Drivers of Industrial Land Demand

A range of broader economic, demographic, technological and environmental trends are influencing industrial land use across Australia. These include changes in manufacturing, the growth of e-commerce, the transition to low-carbon industry, increasing interest in circular economy approaches, and the continued expansion of digital and remote work. These trends are relevant to the broader context for industrial land planning, but they do not affect all regions in the same way.

In Break O'Day, the direct influence of large-scale industrial trends is moderated by the municipality's scale, settlement pattern, infrastructure capacity and distance from major freight corridors. Large-format logistics, high-volume manufacturing and major industrial precincts are unlikely to be the drivers of future demand. Instead, industrial and employment land needs are more likely to be shaped by local and regional conditions.

The key strategic drivers considered in this study are outlined below. These drivers provide the strategic lens for the analysis that follows. The subsequent sections test these issues through economic and employment trends, infrastructure assessment, industrial land supply analysis and stakeholder engagement findings.

Ageing population and local service demand

Break O'Day's older population profile is likely to influence demand for local services, including health, personal services, home maintenance, repair, vehicle servicing and trade-based activity. While many of these businesses are not traditional industrial users, they often require affordable and accessible premises such as workshops, sheds, storage areas and small service commercial spaces.

Tourism and visitor economy

Tourism is an important part of Break O'Day's economy and creates demand for a range of supporting activities. These include construction and maintenance services, food and beverage supply, equipment storage, cleaning, laundry, vehicle and boat servicing, and other back-of-house functions. Industrial land planning therefore needs to consider not only visitor-facing businesses, but also the service businesses that support the visitor economy.

Primary industry and value-adding

Agriculture, aquaculture and fishing remain important parts of the regional economy. These sectors can generate demand for industrial land through storage, handling, equipment maintenance, cold chain infrastructure, processing, packaging and other value-adding activities. There may also be longer-term opportunities linked to circular economy approaches and productive use of industry by-products, although the scale and feasibility of these opportunities would require further investigation.

Construction and trade activity

Construction and trade-based businesses are typically important industrial land users in regional municipalities. Housing demand, renovations, tourism-related investment and local infrastructure works can all support demand for builders' yards, equipment storage,

workshops, depots and building supply businesses. This form of demand is generally incremental and local-serving, but can be significant in areas with limited existing industrial land supply.

Small-scale enterprise and flexible premises

Future industrial land demand in Break O'Day is likely to include small operators, sole traders and micro-businesses. These businesses often need modest, flexible and relatively affordable spaces, including small sheds, workshops, storage units, serviced yards and shared facilities. This points to the importance of providing a range of lot sizes and tenancy formats, rather than relying only on larger industrial parcels.

Infrastructure and environmental constraints

Infrastructure capacity strongly influences the location, scale and type of industrial activity that can be supported. Road access, freight constraints, power, telecommunications, water, sewer and stormwater all affect development feasibility. Environmental and hazard constraints, including flooding, coastal exposure, bushfire risk and sensitive landscapes, also influence the suitability of land for future industrial use.

4. ECONOMIC AND EMPLOYMENT TRENDS

Key takeaways

- Break O'Day's economy is becoming more service-oriented, with employment growth concentrated in sectors such as health care, accommodation and food services, retail, professional services and administrative support. These sectors are important to the local economy, but are not all direct drivers of industrial land demand.
- The sectors most relevant to industrial land planning are those that require workshops, yards, storage, depots, production space, servicing areas or separation from sensitive uses. In Break O'Day, this includes construction, repair and maintenance, transport and storage, food and beverage production, aquaculture, agriculture-related activities and selected manufacturing.
- Future industrial land demand is likely to be incremental and local-serving rather than driven by large-scale industrial expansion. Demand is more likely to come from small operators, trades, storage users, service businesses and niche production activities than from major freight, logistics or heavy manufacturing users.
- Headline economic output does not always translate into local employment or land demand. Some high-output sectors, such as mining, have limited local employment and supply chain impacts, while sectors such as construction, agriculture, food production and repair services are more embedded in the local economy and have clearer land-use requirements.
- Overall, the economic evidence supports a targeted approach to industrial land planning. The priority is not simply to increase the amount of industrial land, but to ensure that appropriately located, serviced and flexible land is available to support local enterprise, economic diversification and the practical needs of existing and emerging businesses.

4.1 Current Strengths and Emerging Sectors

The service sector forms the backbone of Break O'Day's employment base, both in absolute job numbers and in growth over the past decade. Sectors such as health care and social assistance, accommodation & food services, and retail trade collectively represent the largest sources of local employment, driven by tourism, lifestyle migration, and the region's ageing population. While annual growth in these sectors has been modest (1–2%), their scale makes them foundational to the local economy.

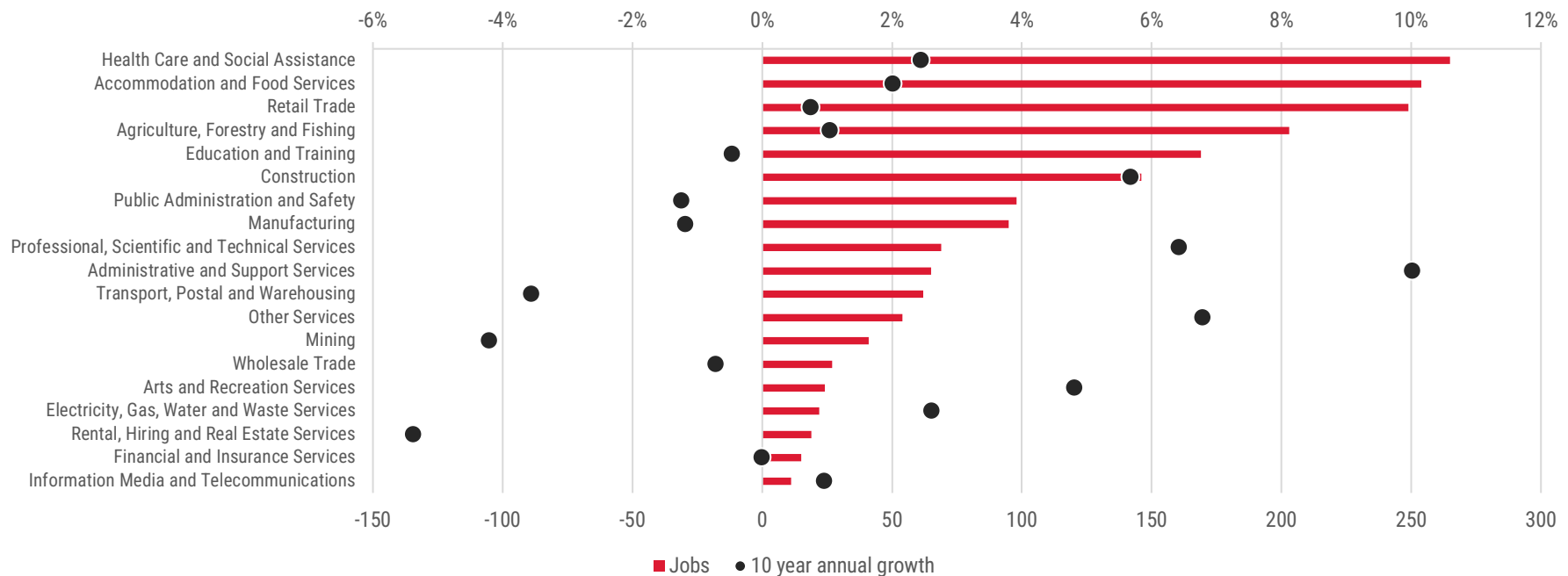
Some of the strongest growth rates were observed in smaller but important service sectors. Administrative and Support Services—which includes office administration, labour hire, building cleaning, and gardening services—grew at an impressive 10% per year, reflecting growing demand for both back-office support and property maintenance services. Similarly, other services, encompassing hairdressing, beauty therapy, and automotive repair and maintenance, grew by 7% annually, suggesting robust demand for personal and localised trade services.

Growth in professional, scientific and technical services (6% annually) and arts and recreation services (5% annually) also points to the emergence of more knowledge-based, creative, or lifestyle-oriented economic activity. These sectors may not yet account for large employment numbers but show potential for expansion, particularly in flexible, mixed-use or 'creative precinct' models that accommodate diverse business needs. These trends align with broader national shifts toward service-oriented, entrepreneurial, and digitally-enabled local economies.

While traditional industrial sectors such as manufacturing, transport and warehousing, and wholesale trade saw either flat or negative growth, construction showed solid performance with 6% annual growth, likely supported by housing activity and demand from both residents and seasonal visitors. Agriculture, forestry and fishing also recorded modest growth (1% annually), underpinned by aquaculture and fishing operations which remain important to the region's economic identity.

These trends point to a diversifying economy in Break O'Day where service delivery, care, construction, and local enterprise are increasingly important. Future industrial and employment land planning will need to support both traditional uses and emerging sectors through flexible zoning and modern infrastructure.

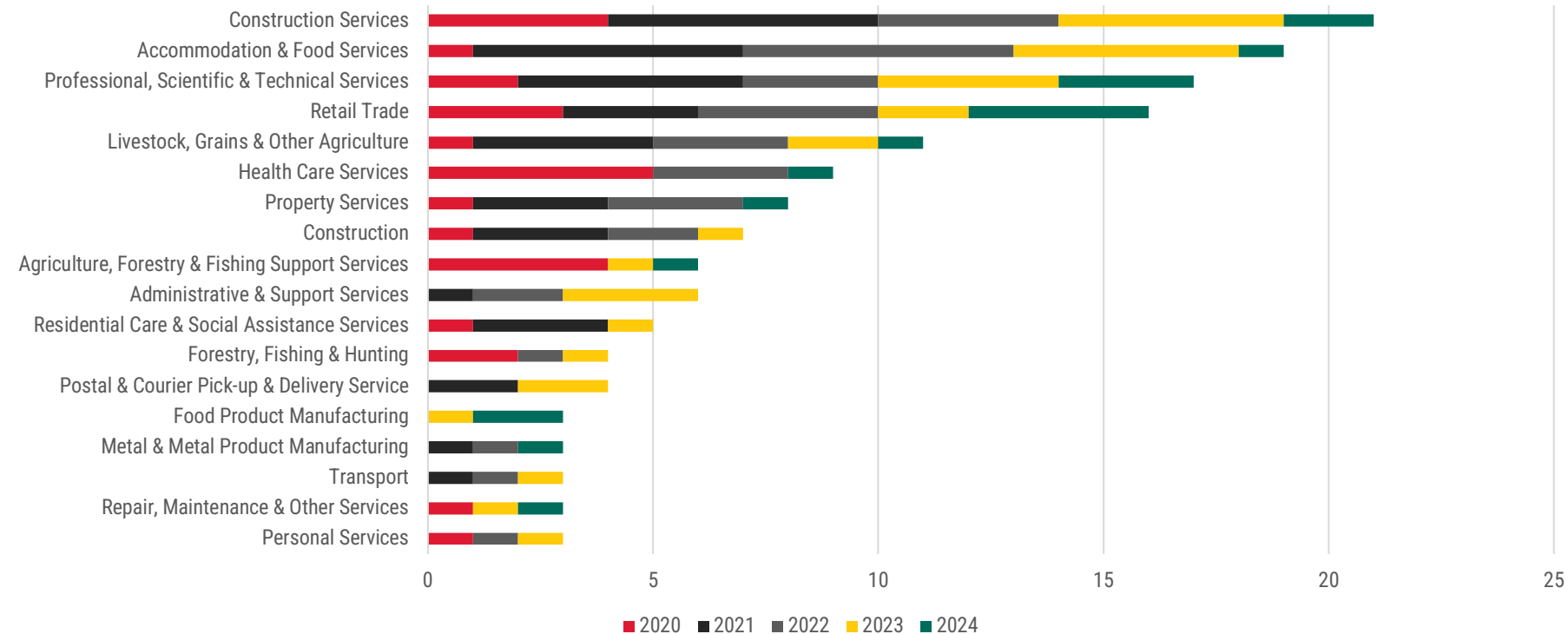
Figure 2: Employment by Industry, 2011 to 2021



Source: REMPLAN Community

Between 2020 and 2024, Break O'Day recorded over 160 business entries, with the most activity in construction services (21 entries), followed by accommodation & food services (19), professional, scientific & technical services (17), and retail trade (16) (Figure 3). Many of these sectors are known for having a high number of new entrants, often due to relatively low barriers to entry or seasonal demand. For example, professional services can be easier to establish and wind down due to lower capital requirements, while construction and hospitality often reflect local demand cycles and contractor models. Importantly, traditional industrial land uses are still visible among the top sectors for business formation. This includes new entries in food product manufacturing, repair, maintenance & other services, and transport, which typically require access to industrial-zoned land and appropriate servicing. While this data captures entries only—not survival rates or employment levels—it supports earlier findings that Break O'Day's economy is increasingly driven by service provision, local trades, and knowledge-based enterprise. These trends point to the need for adaptable industrial and mixed-use precincts that can accommodate both traditional and emerging business types.

Figure 3: Top industries ranked by number of business entries from 1 Jan 2020 to 31 Dec 2024



Source: ABR, February 2025 (compiled by REMPLAN). Includes only businesses registered for GST. Excludes certain non-trading entities.

4.1.1 Location Quotient

Location quotient (LQ) measures how concentrated an industry is in a region compared to the state average, helping to identify areas of local specialisation. LQ can be considered as:

- **1.55-2.0:** Local strengths worth supporting or expanding
- **2.0+:** Highly specialised or export-orientated
- **5.0+:** Often linked to niche or single-employer dominance

LQ should be considered alongside industry size and employment growth to identify competitive advantages, structural risks, and opportunities for strategic investment. Figure 6 presents LQ data for key industry sectors in Break O'Day, showing current LQ (2021), five-year job change (2016–21), and employment size in 2021.

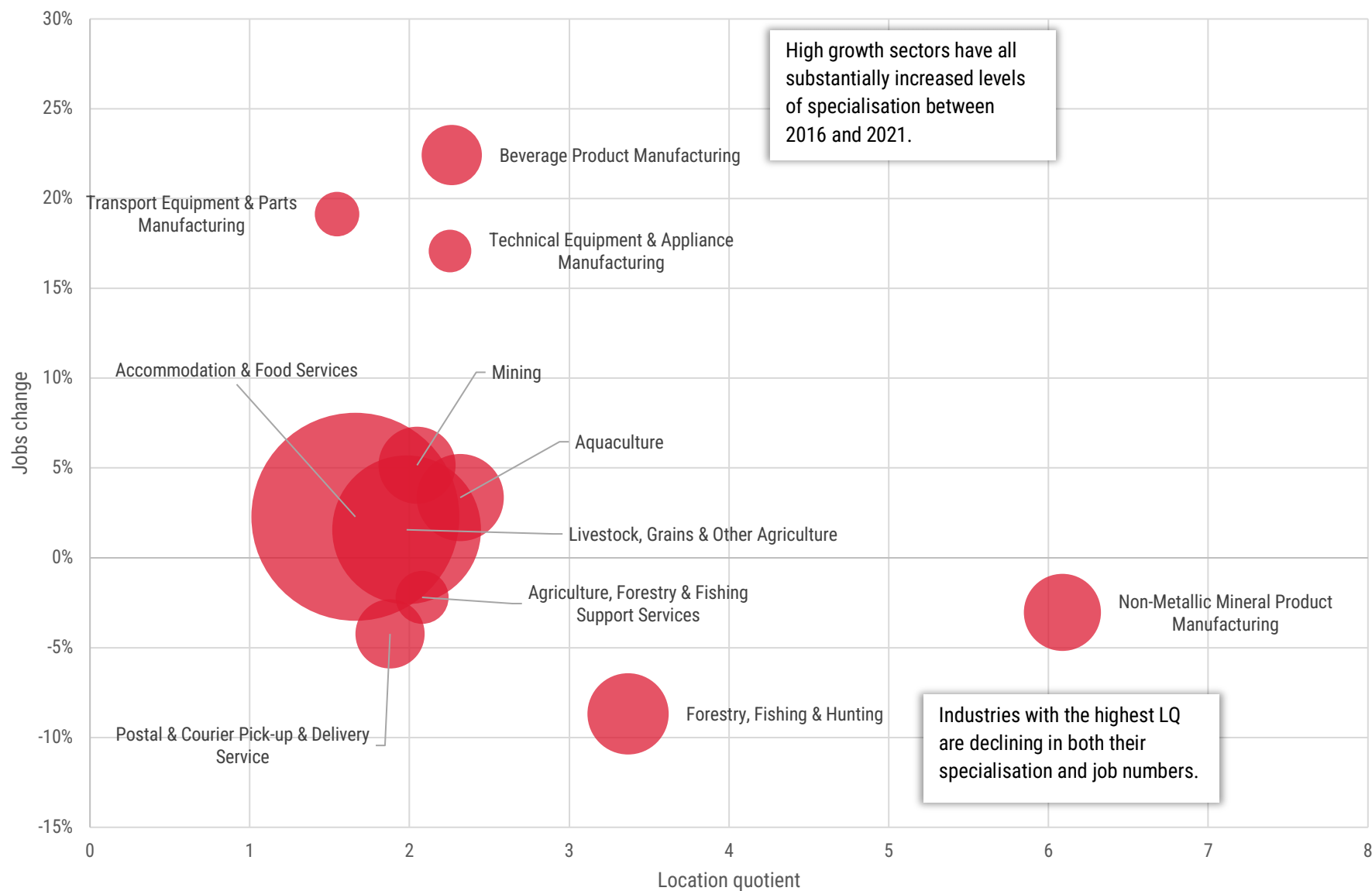
Notably, some industries have seen an increase in specialisation (e.g. beverage manufacturing, technical equipment), while others have experienced a decline in LQ despite being large employers or traditional strengths (e.g. forestry, agriculture support services).

In relation to industrial demand, many of the specialised sectors identified in Break O'Day have a direct need for industrial land or a strong operational connection to industrial activity. Industries such as beverage and equipment manufacturing require spaces for production, storage, and distribution, while mining and agriculture-related sectors often depend on logistics depots, machinery servicing, and downstream processing facilities. Even emerging or niche sectors, like aquaculture and artisanal manufacturing, rely on cold storage, packaging, and supply chain infrastructure typically located in industrial zones.

Table 1 Local specialisation industry summary

Highly Specialised or Export-Orientated	• Beverage Product Manufacturing: Niche and artisanal market. Opportunities exist to expand into premium and export-ready products. • Transport Equipment & Parts Manufacturing: Regional demand and potential synergies with local mining and construction industries. • Technical Equipment & Appliance Manufacturing: Innovation and regional supply chain needs. Could attract high-skill jobs and investment.
Local Strengths	• Aquaculture: Strategic, needs processing/logistics to add value. • Accommodation and food services: Tourism and population driven. • Livestock, Grains & Other Agriculture: Could support food manufacturing or agribusiness. • Mining: Presents opportunities for expansion and value-added downstream processing.
Specialised but Contracting	• Non-Metallic Product Manufacturing: Key industry. Could require innovation or diversification. • Postal & Courier Pick-up & Delivery Services: Facing pressure from digital disruption and changing consumer habits. Potential for e-commerce logistic adaptation. • Agriculture, Forestry & Fishing Support Services: Pressure due to shifts in primary production methods. Targeted support and innovation could help stabilise.
Declining	• Forestry, Fishing & Hunting: Driven by changing environmental regulations, market conditions, and resource constraints. Could benefit from transitioning towards other value-added uses.

Figure 4: Location quotient for Break O'Day Industry Sectors



Source: REMPLAN Economy

4.2 Economic Performance Review

Break O'Day's economy generates over \$715 million in gross revenue and supports approximately 2,000 jobs across a diverse range of sectors. Mining, construction, and property services are the largest contributors to output, collectively accounting for over half of total economic production. However, headline figures alone provide an incomplete picture of regional economic performance.

A more meaningful assessment comes from analysing the relationship between output, employment, value added, exports, and local expenditure. For example, while mining leads in gross output and exports, it contributes relatively few jobs and low local expenditure, indicating a weak local multiplier effect. In contrast, sectors like construction or agriculture provide stronger local linkages and broader benefits despite more modest output.

This multidimensional view highlights the importance of looking beyond singular metrics. It also supports a more strategic approach to industrial land use planning, one that considers where economic productivity overlaps with employment intensity, local value capture, and long-term development potential.



\$715.4 million in gross revenue



Supports around 2,000 jobs



\$332.5 million in regional exports



\$234.6 million in regional imports



\$129.1 million in local expenditure



\$351.7 million in value-added

Source: REMPLAN Economy 2024

4.3 Employment Outlook

This section reviews employment forecasts prepared for the project to inform future planning. These forecasts offer a forward-looking view of how the structure and scale of Break O'Day's economy may change over time. In the context of industrial land planning, they are especially useful for identifying long-term demand trends in sectors such as manufacturing, transport, logistics, construction, and services, all of which typically require dedicated employment land.

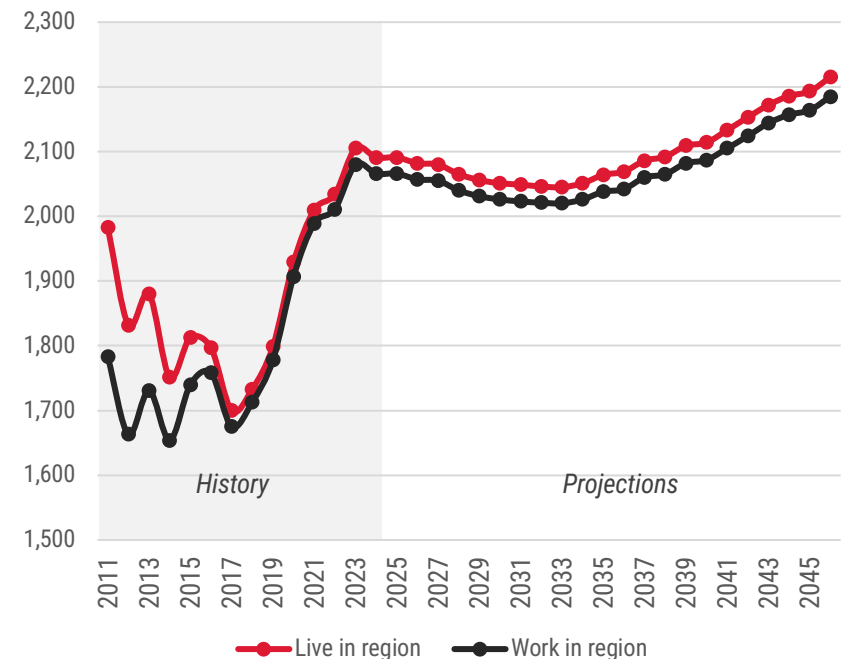
Forecasts are particularly valuable in regional areas like Break O'Day, where limited existing industrial development and constrained land supply can mask underlying demand. In these contexts, employment trends help highlight latent or emerging needs that may not be captured by recent development activity alone.

The forecasts draw on REMPLAN's employment modelling framework and consider:

- Population projections for Break O'Day and its surrounds.
- Patterns of commuting and workforce participation.
- Industry trends, including structural change post-COVID, demographic drivers, and macroeconomic conditions.
- Education, accessibility, and occupation profiles to understand local workforce capacity and sectoral alignment.

Employment outlook summary

Figure 5 Break O'Day employment projections, all industries



Source: REMPLAN

The employment outlook for Break O'Day is broadly positive over the long term, with the number of employed residents projected to grow steadily following a recovery from earlier decline (Figure 9). However, this upward trajectory masks several important structural and demographic dynamics that influence both the short-term outlook and the types of employment the region can sustain.

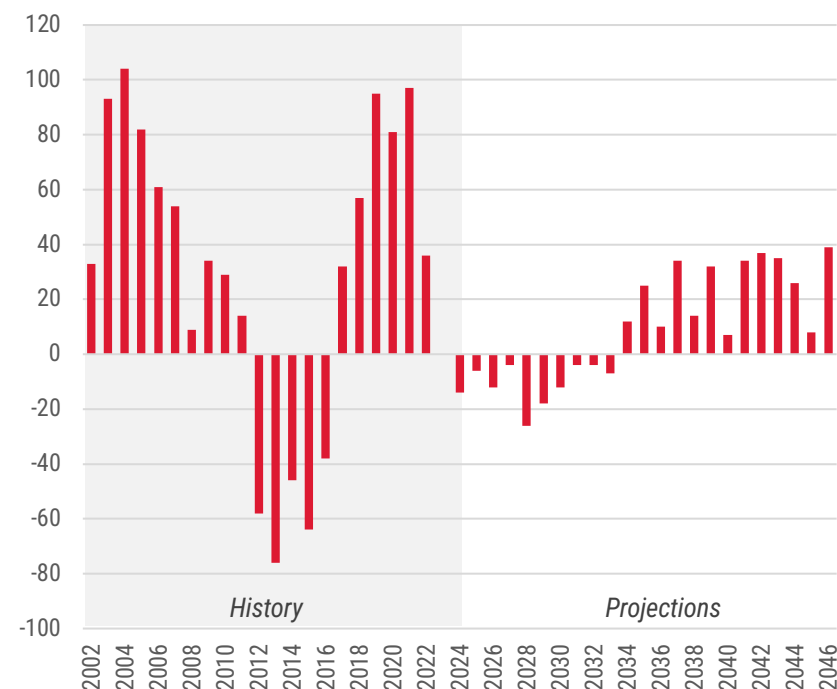
One notable period of change is the sharp decline in employment between 2011 and 2017, followed by rapid growth through to 2021. This recent growth phase coincided with a broader Tasmanian population boom, driven by a strong economy and relatively affordable housing, which saw an influx of new residents to Tasmania, including coastal and lifestyle-oriented regions such as Break O'Day. Since 2021, however, net migration has slowed sharply, and although the population continues to grow, growth rates have contracted significantly. This transition is a key reason why employment growth is expected to stabilise in the short-to-medium term, rather than continuing at the pace observed over the past decade.

At the same time, Break O'Day's ageing population is quietly reshaping the labour force. While locals may notice the arrival of new construction workers, remote professionals, and creative sector migrants, these highly visible trends are not enough to offset the steady outflow of residents into retirement. As shown in Figure 8, which charts annual change in the working-age population (15–70 years), the number of workforce participants declined through the mid-2010s, rebounded briefly, and is expected to remain subdued for the next several years. Most new arrivals are either retired or nearing retirement, and the small number of younger in-migrants is insufficient to replace those leaving the workforce, placing pressure on many local industries that rely on an accessible pool of labour.

Another critical factor illustrated in Figure 5 is the persistent gap between the number of employed residents (those living in Break O'Day) and the number of jobs located in the region (those working in Break O'Day regardless of where they live). This gap suggests a level of out-commuting and remote work, as well as a possible mismatch between local skills and available jobs. While this reflects Break O'Day's appeal as a lifestyle destination, it also

presents opportunities to expand local employment offerings, either by supporting home-based work infrastructure, encouraging the growth of local service industries, or making strategic investments in facilities or precincts that align with evolving workforce and business needs.

Figure 6 Change in working age population, Break O'Day



Source: REMPLAN

Note: Working age population here includes people aged 15-70 years old.

Employment outlook by industry

This section provides a breakdown of employment forecasts by industry, focusing on sectors relevant to industrial land demand. The figures presented reflect people living in Break O'Day, regardless of where they work, rather than jobs located within the region. While service-based industries are expected to drive overall growth, traditional industrial sectors show more varied trends, highlighting the need for targeted and flexible land use planning.

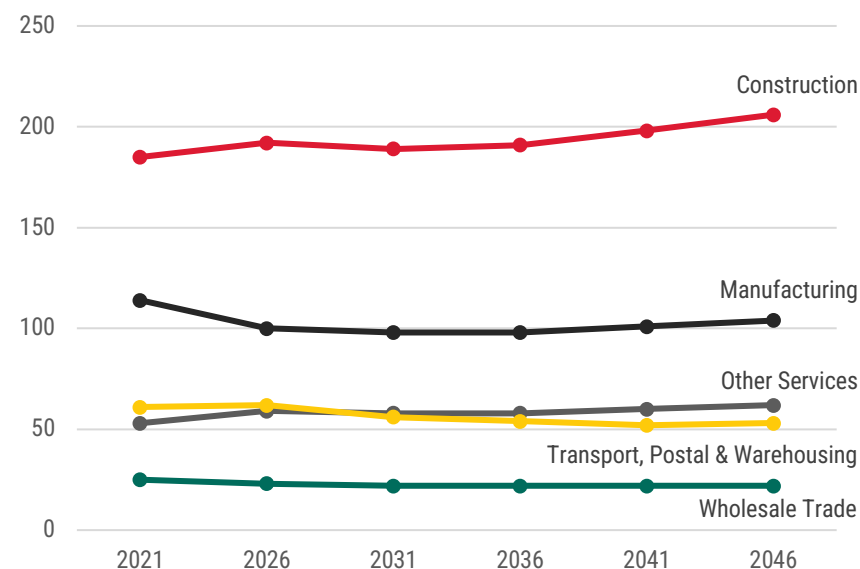
The strongest forecast employment growth in Break O'Day is in population-serving sectors, particularly accommodation and food services, health care, and retail, driven by tourism, an ageing population, and steady household demand. While these industries are not major direct users of industrial land, their expansion may reinforce demand for supporting sectors such as construction, transport, and repair services.

In contrast to the above, employment forecasts for traditional industrial sectors, such as manufacturing, construction, wholesale trade, and transport—show more varied outlooks:

- **Construction (increasing):** This remains one of the most important sectors for industrial land. It is forecast to grow steadily through to 2046, continuing its upward trend seen over the past decade. Growth may support demand for yards, workshops, storage, and trade supply services.
- **Other Services (slight increase):** While this sector includes personal services not typically associated with industrial activity, the repairs and maintenance subsector has shown consistent growth over the past decade and will likely continue to drive demand. Needs are focused on light industrial and mixed-use premises for service-based businesses.

- **Manufacturing (flat or declining):** Manufacturing in Break O'Day is small and specialised, with likely growth in food and beverage production supported by local inputs. This may be offset by declines in other subsectors, resulting in flat employment but potential opportunities for niche or value-added activity.
- **Transport, Postal & Warehousing (declining):** Forecasts suggest continued softening in this sector, likely due to centralised logistics hubs and the region's remoteness. However, targeted local infrastructure (e.g. courier depots, storage sheds) will remain important.
- **Wholesale Trade (stable):** This sector is expected to remain small and relatively flat. Demand for industrial land is typically co-located with construction and transport services rather than as standalone activity.

Figure 7 Employment forecasts, selected industrial sectors



Source: REMPLAN

4.4 Key Sector Profiles

A summary of selected industries that are either significant contributors to local economic activity, are typically demand sectors for industrial land, or potential growth industries are provided in Table 2 below.

Table 2 Selected industry economic summary

Sector	Economic role	Industrial land relevance
Mining <i>(Solely coal mining in Break O'Day)</i>	High output, limited local flow-on benefits. Highest output and exports (\$82.5M and \$81.6M respectively), with high economic value per worker (\$1.69M). Generates very low direct employment (36 jobs) and a low share of spending retained locally (5.7% of output), suggesting a large share of profits and supply chain activity may flow outside the region.	Not a direct driver of industrial land demand in the LGA. May require access to operational and maintenance infrastructure, but limited local flow-on benefits suggest it does not justify significant new industrial land provision beyond existing needs.
Construction <i>(Residential, non-residential and civil construction; excludes individual trades)</i>	Mid-sized sector with strong local links. One of the highest shares of spending retained locally (32.4%), reflecting good regional supply chain integration. Solid balance between output (\$69.9M) and employment (62 jobs).	A direct and consistent industrial land user. Supports demand for builders' yards, workshops, equipment storage, depots and trade supply premises. Well-placed to benefit from dedicated light industrial zones.
Livestock, Grains & Other Agriculture	Locally valuable, with scope to develop further. Third highest employment in the LGA (134 jobs) with high value added. Moderate local purchasing and sales (21.7% and 16.8% respectively) indicate positive supply chain links with potential to develop further.	May support demand for small-scale processing, storage, equipment servicing and value-adding facilities where linked to local producers.
Non-Metallic Mineral Product Manufacturing <i>(concrete and ceramic products)</i>	High output relative to employment. Generates \$44.0M in output with 36 jobs. Good local sales integration and some regional export activity. Reasonable share of spending retained locally (22.7%).	May require continued access to industrial land with good road access, buffers and space for materials handling. Linked to regional construction and mining supply chains.
Food Product Manufacturing	Strong local supply chain links and value-add potential. One of the highest levels of local purchasing of all industries (33.7%), with strong connections to the local agricultural sector. Moderate export exposure with potential to grow.	Supports demand for small-scale production space, cold storage, packaging and shared processing facilities. Opportunity to support emerging producers through shared or low-cost industrial premises.
Beverage Product Manufacturing	Efficient and export-oriented. Strong economic value per worker (\$222k) with moderate local spending supporting both local and external market integration. Export-oriented (3.3% of regional exports).	May support demand for small production premises, storage and visitor-facing production spaces where appropriate. Shared facilities could benefit small-scale producers.
Repair, Maintenance & Other Services	Broadly embedded in the local economy.	A direct and consistent industrial land user. Justifies provision in light industrial precincts or

<i>(vehicle and machine repair and maintenance)</i>	Purchases from and supports a wide range of local sectors, including transport, construction and agriculture. Broad demand base with strong local retention of economic activity.	mixed-use employment zones, particularly near main population centres.
Aquaculture	Small but specialised, with growth potential. Employs 46 workers with output of \$23.5M. Highly export-oriented (90.0% of output). Moderate local spending (20.2% of output).	May require access to land for storage, processing, cold chain, equipment servicing and marine support activities, subject to environmental and infrastructure constraints.
Electricity, Gas, Water & Waste Services	Capital-intensive with low direct employment. Employs 13 workers, generating \$15.09M in output. Moderate local purchasing and sales suggest some potential to support broader local economic activity.	May require specialised sites with appropriate buffers and infrastructure, particularly for waste, recycling or circular economy activities.

Note: Creative and maker-based activities (including arts, cultural and performing arts industries) may be relevant to mixed employment precincts and place-making, but are not a primary driver of industrial land demand and are not included in the table above.

5. REGIONAL INFRASTRUCTURE

Industrial growth in Break O'Day is shaped by a combination of regional infrastructure constraints and selective infrastructure assets. While St Helens and Fingal provide a modest level of local industrial land, the municipality's broader connectivity, energy and servicing limitations reduce its competitiveness for large-scale, freight-intensive or energy-intensive industrial investment. At the same time, some parts of the municipality, particularly around Fingal and the western corridor, have strategic attributes that may support longer-term opportunity-driven industrial uses.

Key regional infrastructure considerations include:

- **Limited regional road access:** Break O'Day is not connected to Tasmania's major freight corridors. Key routes, including the Esk and Tasman Highways, are classified as regional access roads with limited capacity and geometry. Sections east of St Marys are also largely excluded from the state's Higher Mass Limit (HML) network, limiting the efficiency of heavy vehicle movements.
- **St Marys Pass constraints:** St Marys Pass is a key connector between the east coast and the broader regional road network. Its narrow, winding alignment and history of closures is an identified issue with the Department of State Growth undertaking an options assessment to investigate potential upgrades or alternative routes, with findings expected in late 2026.
- **Rail corridor access in Fingal:** Fingal is located on the rail corridor associated with the Duncan Colliery. While rail access does not on its own create industrial demand, it is a strategic asset that may be relevant if a larger or specialised industrial opportunity emerges over the longer term.
- **Variable energy infrastructure:** The eastern part of the municipality is serviced by distribution-level electricity infrastructure, with an 11 kV line terminating at St Marys. Energy-intensive industries in eastern areas may require site-specific confirmation of network capacity. The Fingal corridor has access to higher-capacity electricity infrastructure, which may improve its suitability for larger or more energy-reliant industrial uses, subject to detailed servicing assessment.
- **No access to reticulated gas:** The state gas pipeline bypasses the municipality, limiting opportunities for industrial activities that rely on high-temperature processes, on-site energy generation or lower-cost fuel for continuous operations.
- **Inconsistent digital infrastructure:** Telecommunications coverage and NBN reliability remain inconsistent, with stakeholders reporting issues in both St Helens and Fingal. This can affect the viability of digitally enabled businesses, remote work, modern service industries and technology-reliant operations.

Overall, Break O'Day's infrastructure setting points to two different industrial land roles. In and around the main population centres, particularly St Helens, Scamander / Beaumaris, and St Marys, future demand is likely to be local-serving industrial activity. Around Fingal, road, rail and energy assets create a longer-term strategic opportunity for larger or specialised industrial uses if demand emerges. This distinction is considered further in the precinct audit and future land assessment sections that follow.

The road between St Marys and St Helens is restricted for Higher Mass Limit vehicles as is a large section of the Tasman Highway between St Helens and Pyrgana.

Legend:

- Gas Pipeline
- Electricity Transmission (KV)
 - 11
 - 88
 - 110
 - 220
- Towns
- Railway Lines
- LGA Boundary
- State road network
 - Other Road
 - Feeder Road
 - Regional Access Road
 - Regional Freight Road
 - Trunk Road

6. INDUSTRIAL LAND SUPPLY AND USE

St Helens



47 Total Industrial Lots (ex strata)
43 Occupied, 4 Vacant (2 with permits) - At Capacity
269,537m² of Zoned Industrial Lots



General Industrial Zoning

Surrounded by **Rural Residential, Recreational, and Environmental Management Zones**
Restrict Expansion due to Incompatibility, Environmental Sensitivity and Potential Flood Risk



Land is at Capacity

Lack of Dedicated **Utility Zoned** Land
Reliance on Rural-Standard Roads **Limits** the Potential for **Heavy Freight** or **Heavy Industrial Uses**
Industrial Expansion Options are Limited due to **Regulatory** and **Physical Constraints**

Fingal



6 Total Identified Industrial Lots
1 Single Occupied Depot (partially developed), 1 dwelling, 1 vacant lot
93,397m² of Zoned Industrial Lots



General Industrial Zoning

Adjacent to **Rural Residential** and **Rural Zones**
Fewer Surrounding Land Use Conflicts
Moderate Expansion Potential, Subject to Environmental Considerations, and Community Infrastructure Proximity



Low demand and infrastructure required

Despite a large vacant site and fewer constraints, there is minimal current activity.

6.1 Audit of Existing Precincts

6.1.1 St Helens Industrial Area

Overview

The St Helens Industrial Precinct is the primary industrial area in the Break O'Day region, comprising two distinct sub-areas.

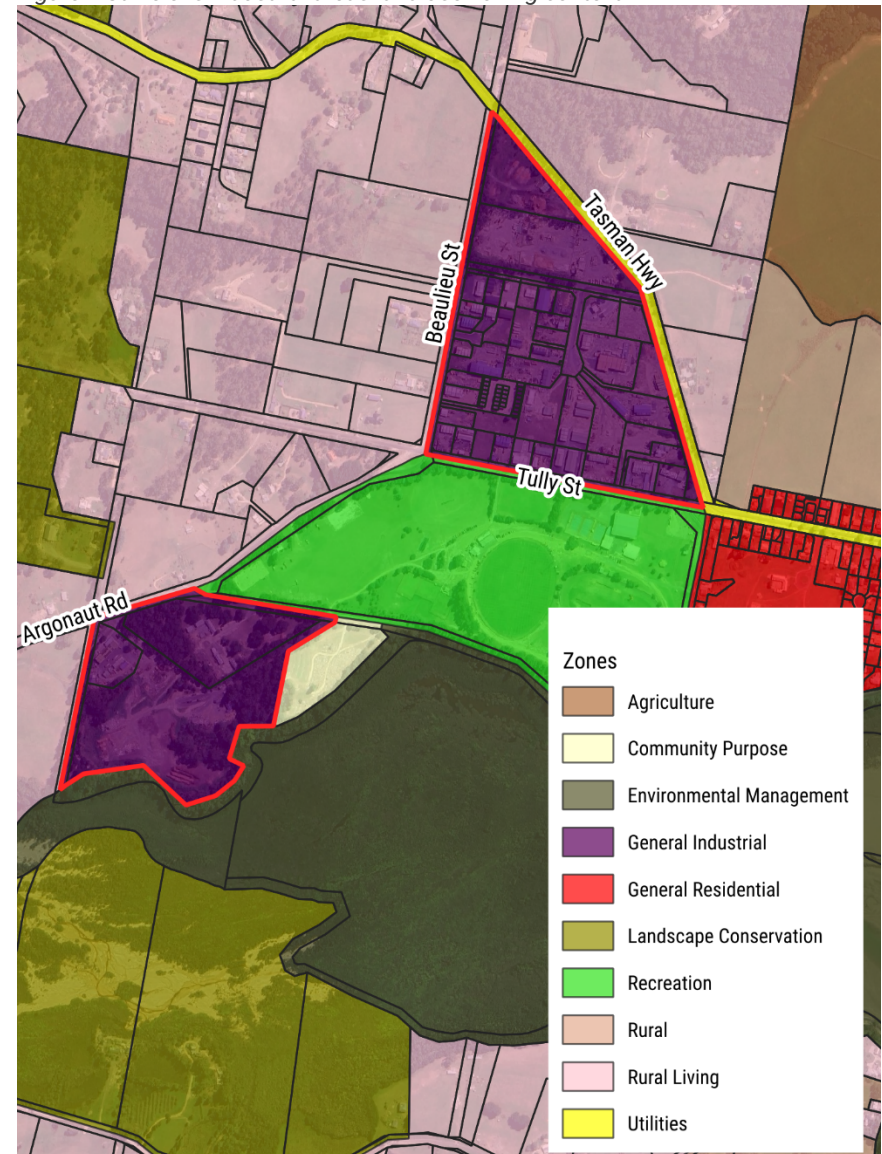
To the south, the Argonaut Road precinct is dedicated exclusively to government depot uses, including essential services and operational facilities on large, consolidated lots.

To the north, the Tully Street precinct accommodates a diverse mix of trade services, repair and maintenance, light manufacturing, and a significant concentration of warehousing and general storage uses.

Tully Street is operating near full capacity, with limited vacant land available and few opportunities for expansion due to surrounding residential and environmental constraints. This places growing pressure on the existing supply to meet future industrial and service sector needs.

- Total zoned land area: 27.0ha (excluding roads)
- Number of industrial lots: 47 (excluding strata)
- Vacant lots: 4 (2 undergoing permit assessment)
- Key uses: Warehousing/storage, manufacturing, Automotive repair and maintenance, transport.

Figure 9 St Helens industrial areas land use zoning context



Land use and vacancy

The St Helens industrial precinct comprises two areas: Tully Street, the main hub for general industrial activity, and Argonaut Road, which hosts government depots.

Tully Street is dominated by warehousing and storage, spanning 44 lots (70 including strata) over 16.6 ha. This includes identified storage businesses, primarily self-storage, and properties with no registered business but containing sheds or miscellaneous goods.

This mix highlights the informal, flexible nature of land use in the precinct, serving a range of storage and operational needs for small to medium-scale operators. Other notable land uses in Tully Street include:

- Repair and maintenance: 6 lots (~18,650 m²), mainly automotive and equipment servicing
- Manufacturing: 5 lots (~19,400 m²), generally light-scale operations
- Transport: 2 large lots (~30,950 m²), used by service operators
- Vacant: 4 lots (~12,000 m²), with 2 under current development assessment

While some sites could be redeveloped, limited vacant land means the precinct is functionally at capacity (Figure 10).

Surrounding sensitive uses

Sensitive uses are encroaching on the precinct from the north and west, constraining opportunities for outward expansion. However, there remain some parcels within the precinct that could accommodate development with appropriate setbacks, particularly for lower-intensity industrial activities. (Figure 11).

Infrastructure and servicing

While centrally located and well-used, the precinct faces notable infrastructure constraints:

- Roads: Reasonable access, but narrow widths and tight corners restrict heavy vehicles
- Water and Sewer: Reticulated services are available
- Recycled Water: Available in the township but not extended to the precinct
- Stormwater: Present but inadequate—runoff is often redirected or blocked, causing local flooding
- Electricity: High voltage is available and TasNetworks indicate distribution substations have 'Good Capacity'
- Gas: No reticulated gas
- Telecommunications: Service is patchy and inconsistent across the township

Natural constraints and built form

The precinct is constrained by natural factors and outdated design:

- Flooding: Some industrial land is prone to overland flow and local flooding
- Environmental and scenic constraints: Overlays for scenic protection, natural assets, landslip, and hazards limit expansion. A broad bushfire overlay also applies
- Built form and character: The area is functional but dated—marked by chain mesh fencing, barbed wire, minimal landscaping, and utilitarian buildings. This detracts from visual quality and creates challenges for aligning with modern design, environmental, or mixed-use standards.

Figure 10 St Helens industrial precinct context

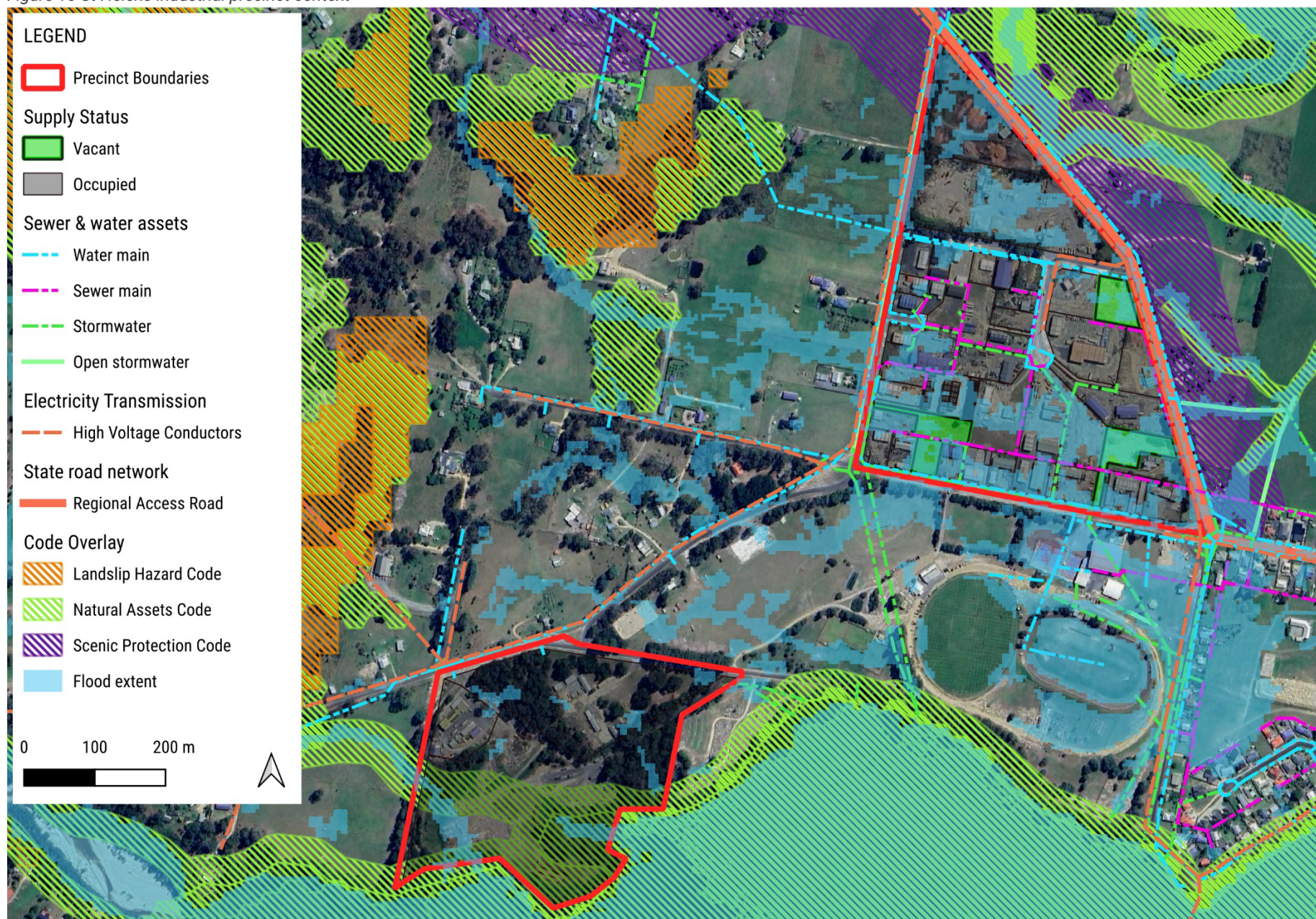
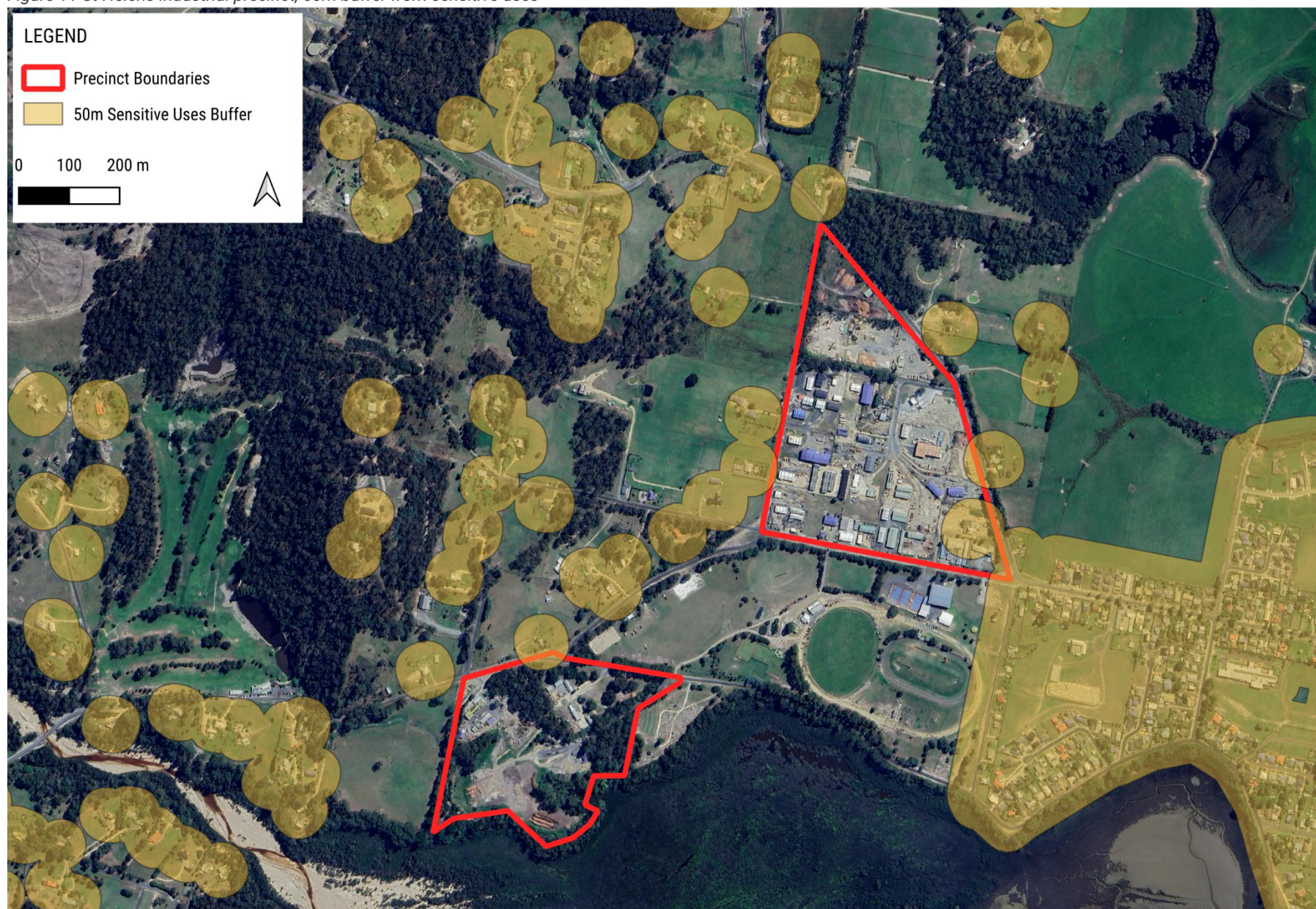


Figure 11 St Helens industrial precinct, 50m buffer from sensitive uses



Sensitive uses include General Residential Zone and isolated buildings from LIST Building Polygons 2D (Accommodation, Education Centre, Health Facility, Hospital, Residential Building)

6.1.2 Fingal Industrial Area

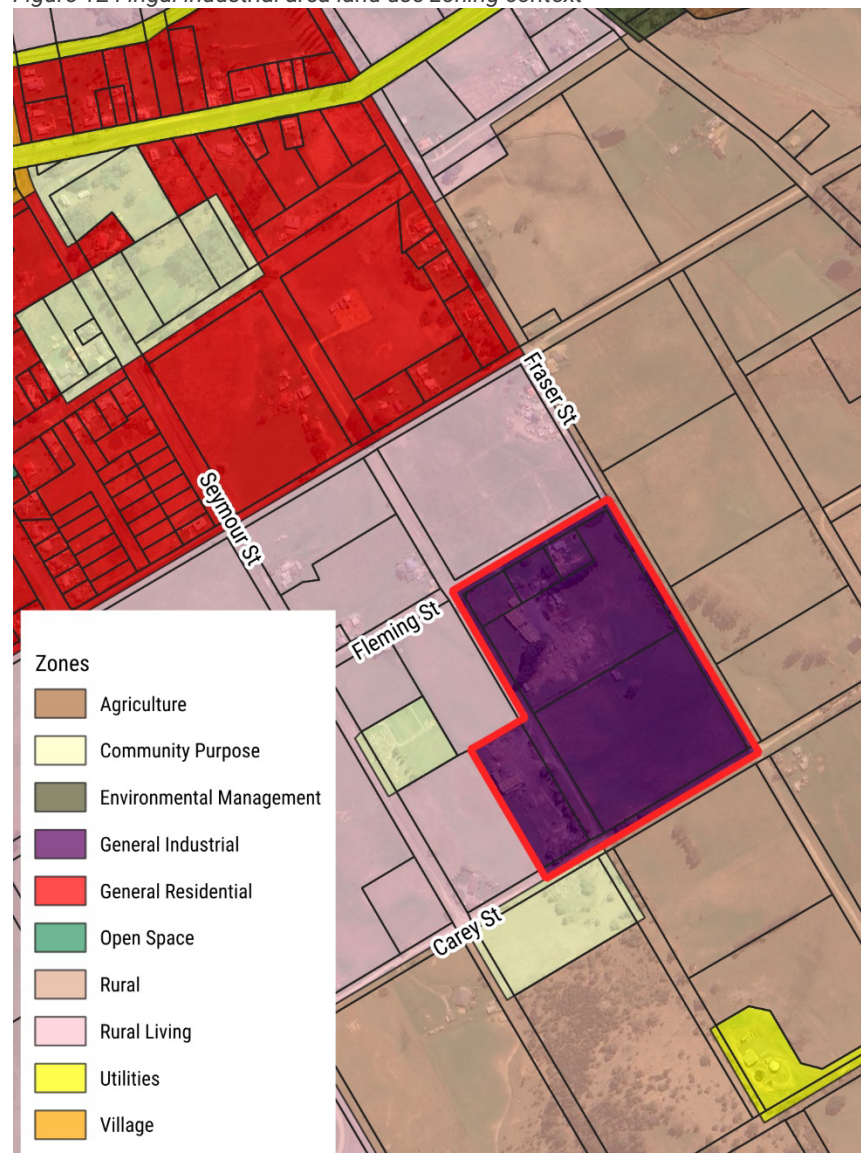
Overview

The Fingal industrial precinct is a small, low-activity area located on the edge of the township. It contains only a handful of land uses, including a government depot, a residential dwelling, and a large vacant site. Unlike St Helens, the precinct does not support a diverse mix of industrial activity and has no current commercial or manufacturing tenants. Its peripheral location, minimal infrastructure, and absence of clustering limit its function as an industrial employment area at present.

The precinct is serviced by a reticulated water supply, but lacks sewer, stormwater, gas, and high-voltage electricity, constraining its potential for expansion or attraction of new industrial users. While the vacant land offers future potential, development would be contingent not only on infrastructure upgrades, but also an increase in population and/or economic activity in the township.

- Total zoned land area: ~9.3 ha
- Number of industrial lots: 6
- Vacant lots: 1 (39,820 m²)
- Key uses: Council depot.

Figure 12 Fingal industrial area land use zoning context



Land use and vacancy

Land use within the Fingal industrial precinct is minimal and highly concentrated. A single government depot is the only active industrial use, occupying one property with a significant portion of the site remaining undeveloped. A residential dwelling is also located within the precinct boundary, which may limit future compatibility depending on the nature of surrounding development.

The balance of the precinct comprises a single large vacant lot, accounting for nearly 4 ha. While this represents a substantial landholding, it is currently unutilised and lacks supporting infrastructure or surrounding activity to drive demand.

With no other commercial, manufacturing, or service-based uses currently present, the precinct functions more as a land reserve than an active industrial area.

Surrounding sensitive uses

Development pressure from sensitive uses on the precinct in Fingal is relatively low, despite there being some isolated dwellings in the vicinity (Figure 14).

Infrastructure and servicing

The Fingal industrial precinct has limited infrastructure servicing. It is connected to the reticulated water network, but lacks access to sewer, stormwater infrastructure, and reticulated gas—factors that significantly constrain its capacity to support new or intensive industrial uses.

The Esk Highway, a regional access road, runs through Fingal however roads servicing the industrial area are narrow rural roads and not all sealed. Fingal is located at the terminus of the railway line serving the Duncan Colliery, which historically supported coal

transport. While this line is not currently leveraged for industrial use within the precinct, its presence represents a potential asset should freight activity or industrial interest increase in the future.

Natural constraints and built form

The precinct is constrained by natural factors and outdated design:

- Flooding: Some industrial land is prone to overland flow and local flooding
- Environmental and scenic constraints: A broad bushfire overlay applies and natural asset protection to the site's east. The Precinct is otherwise largely unconstrained.
- Surrounding land uses: Rural residential zones to the north and west may restrict expansion potential due to lot size, proximity, and amenity concerns
- Built form and character: The area has a distinctly rural character. Development here is sparse and functional, serving local needs rather than presenting as a formal industrial precinct. Given its scale and setting, there is unlikely to be demand for significant planning or design intervention.

Figure 13 Fingal industrial precinct context

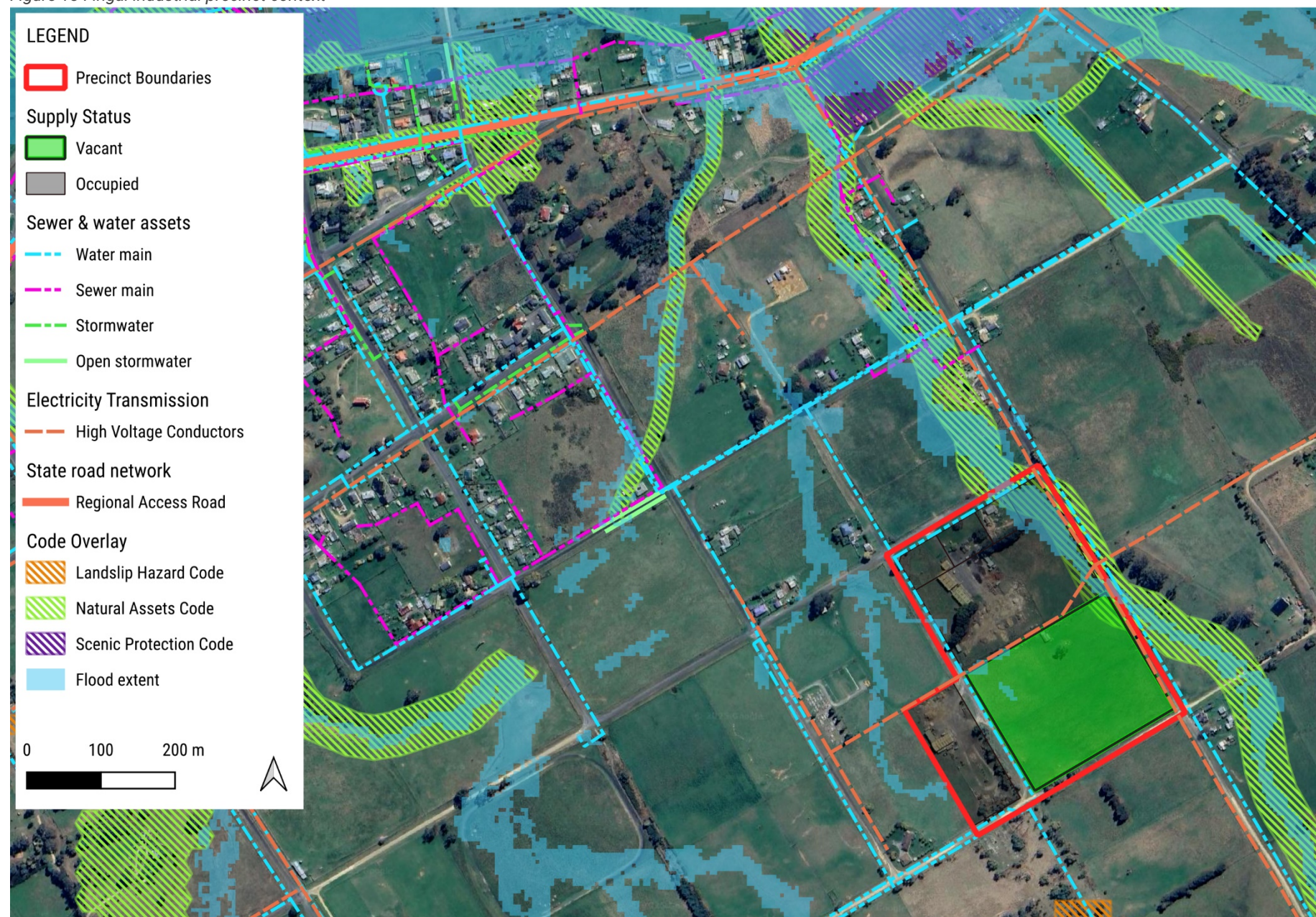
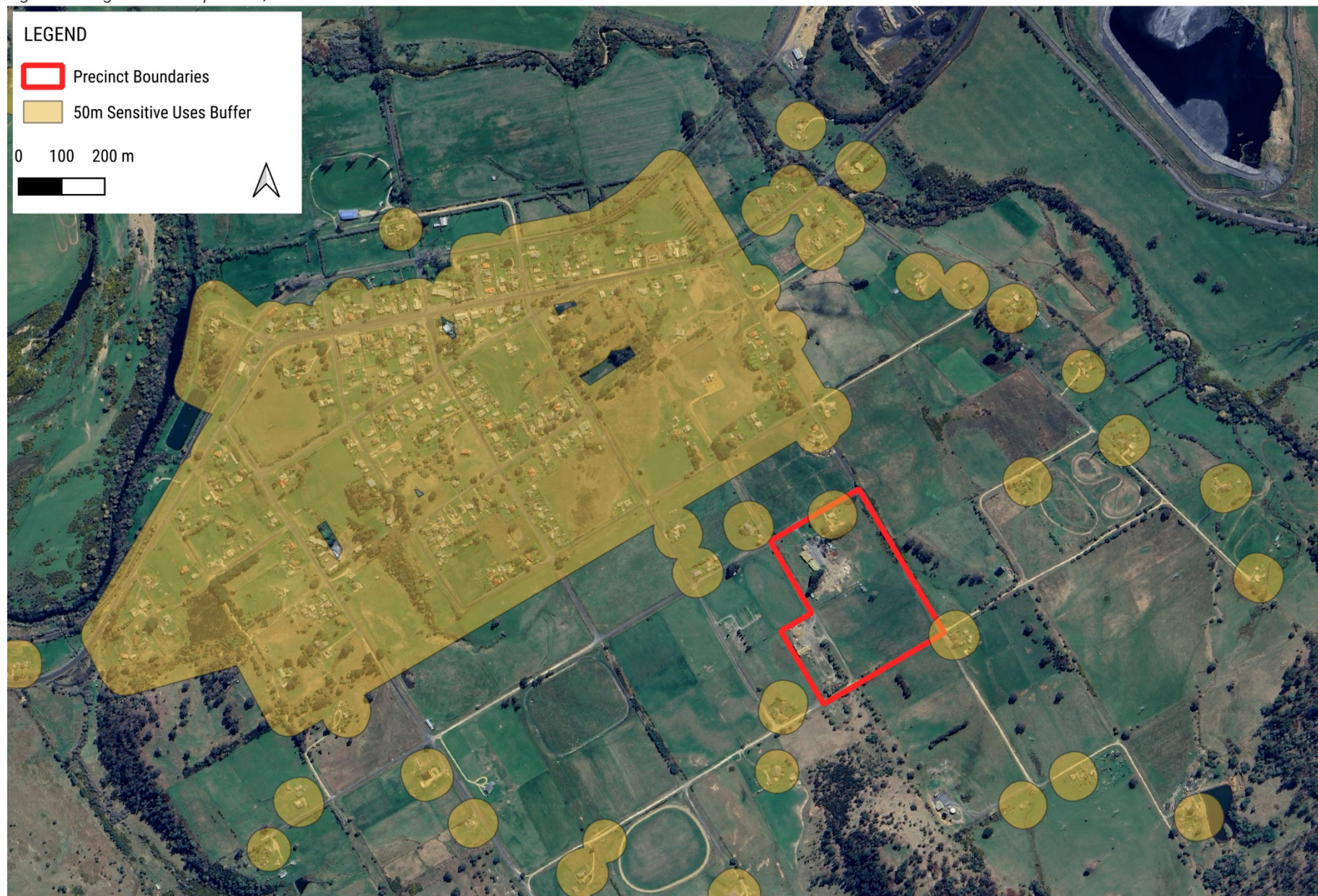


Figure 14 Fingal industrial precinct, 50m buffer from sensitive uses



Sensitive uses include General Residential Zone and isolated buildings from LIST Building Polygons 2D (Accommodation, Education Centre, Health Facility, Hospital, Residential Building)

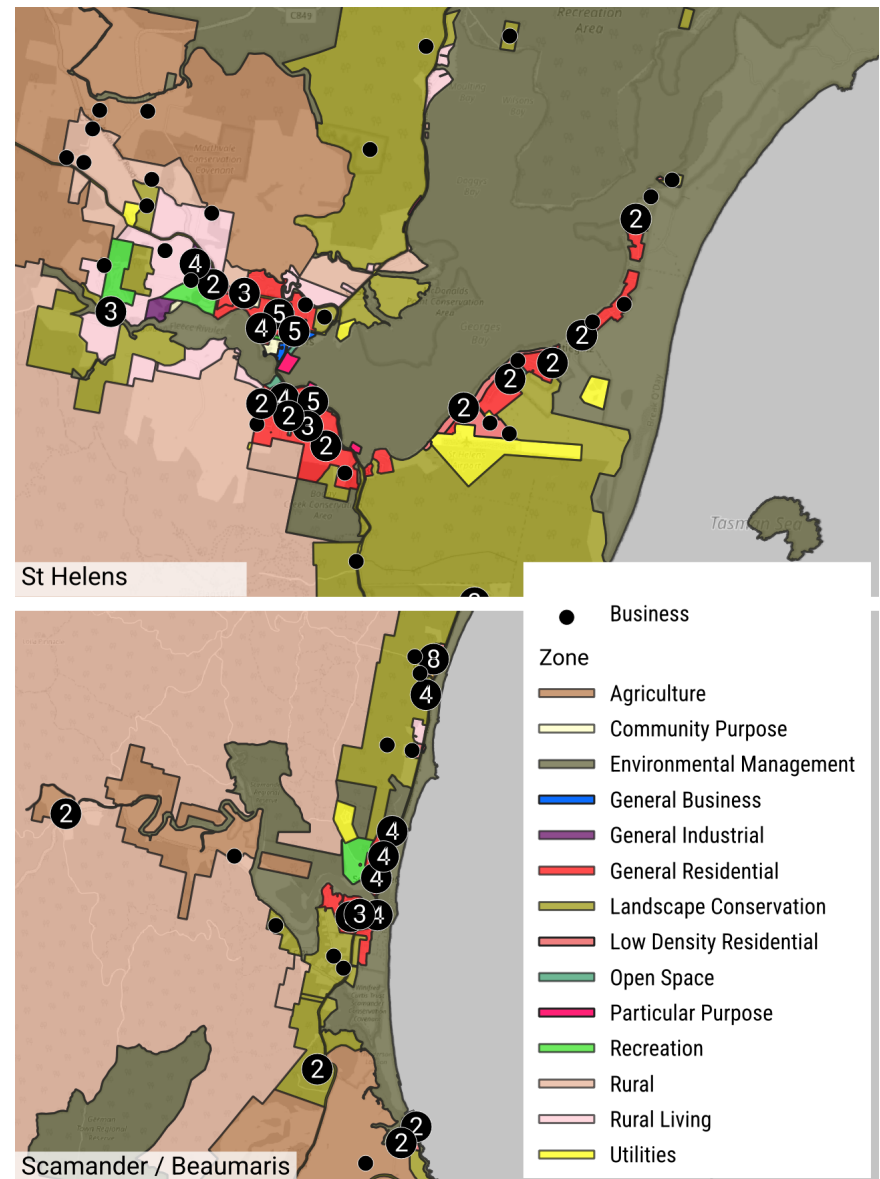
6.2 Business locations

Australian Business Register data was reviewed to understand where GST-registered businesses in industrial-demand sectors are registered. This included construction, manufacturing, transport, repair and maintenance, agriculture-related services, wholesale trade and other industrial-support activities. The data should be interpreted carefully: a registered address may be a trading location, home office, registered office or accountant's address. Registration in a residential or rural area does not mean a business is non-compliant, nor that it operates at a scale requiring industrial land.

The analysis indicates that many businesses in these sectors are registered outside existing industrial zones, including in residential and rural areas around St Helens, Scamander and other settlements. This is partly expected, particularly for construction trades, sole traders and small service businesses that often operate from home or use a non-industrial registered address.

Despite these limitations, the pattern is relevant for industrial land planning. It indicates that Break O'Day's industrial economy is not confined to existing industrial precincts and may include dispersed, home-based or informal business activity. While not all of these businesses require industrial premises, the pattern supports the case for flexible and modest-scale options such as small sheds, workshops, storage units, yards and mixed service-commercial spaces.

This aligns with stakeholder feedback that demand is strongest for modest, lower-risk premises rather than large industrial lots. Future planning should therefore consider not only the amount of zoned industrial land, but also the type, scale and affordability of premises available to small operators.



7. STAKEHOLDER ENGAGEMENT FINDINGS

7.1 Engagement Summary

Land Availability & Suitability

- Desire for development-ready industrial land (serviced, zoned, and accessible).
- Demand for small, low-risk premises (e.g. small sheds, workshops, storage units) rather than large greenfield industrial sites.
- Requests for variety in lot sizes (to support both micro-businesses and established operators).

Costs & Feasibility

- High construction and development costs making projects unattractive.
- Commercial leases seen as too inflexible and risky for small startups.
- Lack of holistic planning shifts costs onto individuals (e.g. parking, stormwater modelling).

Infrastructure Constraints

- Transport and logistics: oversize loads difficult to move through St Helens; reliance on Launceston for supplies; weak signage.
- Digital connectivity: NBN and mobile services patchy or expensive to upgrade.
- Utilities: power reliability and surges causing issues for aquaculture and manufacturing businesses.

Workforce & Skills

- Difficulty finding reliable local staff.
- Seasonal workforce doesn't match business peak needs.
- Skills shortages in trades and technical roles.

Business & Industry Opportunities

- Growth potential in light industry and construction support.
- Demand for storage facilities (self-storage, boat, small warehousing).
- Opportunities in aquaculture, food and beverage production, small-scale manufacturing.

Community & Regional Context

- St Helens seen as the central hub; smaller towns (e.g. St Marys, Fingal) viewed as less viable for large-scale industry.
- Desire for mixed-use spaces (storage + office, small commercial precincts) to nurture startups and creative industries.
- Concern about poorly planned past industrial areas – need a more strategic, long-term approach.

7.2 Engagement Process

Stakeholder engagement was undertaken to capture a range of perspectives from local businesses, landowners, community members and industry representatives. The process was designed to provide both breadth (through short and detailed surveys) and depth (through in-person conversations), ensuring that the findings reflect the diversity of voices across Break O'Day. More than 600 businesses were contacted directly by email to invite participation, and details of the project were also made available on Council's website. While workshops were originally planned, a lack of interest and availability from the people and groups contacted meant these did not proceed. As response numbers were modest, the engagement findings should be interpreted as targeted qualitative input rather than a statistically representative sample of all businesses in Break O'Day. An early online workshop was held with councillors, providing high-level perspectives that closely aligned with the issues and opportunities later raised by businesses and the community.

Engagement methods included:

- Councillor workshop: An online session with elected representatives to explore strategic issues and “big picture” opportunities for the region.
- Quick survey: A short online questionnaire to capture initial views on challenges and opportunities. 12 responses were received.
- Detailed survey: A longer-format online survey exploring land availability, infrastructure needs, and business growth opportunities. 16 responses were completed.
- One-on-one discussions: Semi-structured interviews (typically 30 minutes to 1 hour) with key stakeholders including local businesses, landowners, and service providers. 5 participants contributed through this method.

This multi-pronged approach provided both quantitative feedback on recurring issues and qualitative insights into the lived experience of operating in the region.

7.3 Directions from Engagement

The feedback gathered through surveys, interviews and the councillor workshop strongly reinforces the broader findings of this study. A number of consistent directions emerge:

- **Strategic over ad hoc planning:** Stakeholders emphasised that the costs and barriers created by piecemeal requirements (e.g. parking, stormwater, flood modelling) highlight the need for industrial land to be proactively planned and serviced. This aligns with the report's finding that future supply should be *development-ready*, with shared infrastructure provided upfront.
- **Infrastructure as a critical enabler:** Transport constraints (oversize loads, St Marys Pass), digital connectivity gaps, and unreliable utilities are seen as just as important as land supply itself. This mirrors the analysis that industrial precinct planning must integrate infrastructure investment alongside zoning.
- **Right scale, right place:** The strongest demand appears to be for smaller, flexible premises along with general demand for storage facilities in St Helens, rather than large new estates. This reflects the modelling that points to incremental, small-scale demand over the medium term.
- **Sectoral opportunities:** Aquaculture, light industry, trades, and small-scale manufacturing/food production were highlighted as growth areas. This aligns with the economic analysis of emerging sectors that could diversify the local economy if appropriately supported.
- **Workforce and skills pressure:** Difficulty in securing reliable, skilled workers is a shared concern across industries. This reinforces the report's finding that land planning cannot be isolated from the broader regional challenges of workforce attraction and housing.

Taken together, these directions suggest that Break O'Day's approach to industrial land should focus on *quality, flexibility, and enabling infrastructure*, rather than simply increasing the quantity of zoned land.

8. LOCAL OPPORTUNITIES

Key takeaway

Break O'Day's industrial land future is likely to be shaped less by large-scale industrial estates and more by small, flexible, and service-oriented uses that respond to local demand. Stakeholder feedback consistently pointed to needs such as storage facilities, small-format workshops, and trade-based services, alongside opportunities in aquaculture, food and beverage production, and light manufacturing. These opportunities depend not only on land availability but also on improvements to infrastructure (digital connectivity, reliable power, and shared services) and more enabling planning settings that reduce costs and barriers for small operators.

8.1 Economic and Sector-Based Opportunities

Industrial land in Break O'Day is best positioned to support a mix of businesses aligned with local service needs and emerging niche sectors, rather than large-scale industrial investment.

Trade-based services and workshops:

Ongoing demand exists for construction yards, equipment hire, and vehicle servicing, particularly as residential development and tourism-related activity continue to grow. Stakeholders highlighted that these uses rely on affordable, small-format spaces such as sheds and workshops, which are currently in short supply.

Storage facilities:

Engagement reinforced strong and growing demand for storage, including self-storage, boat storage, and small-scale warehousing. These uses provide a low-risk entry point for small operators and support local trades and service businesses that need secure bases in St Helens.

Food and beverage production and aquaculture:

There is clear potential for localised production and value-adding, building on the region's agricultural and aquaculture strengths. Stakeholders noted the need for cold storage, small-scale packaging, and processing facilities, particularly to support seafood exports and new artisanal food and beverage ventures.

Light manufacturing and niche production:

The region's lower-cost land and adaptable zoning create opportunities for small-scale fabrication, custom assembly, and mobile workshops. These are particularly suited to businesses seeking a flexible base outside metropolitan centres, provided reliable infrastructure and planning support are available.

8.2 Innovation and Infrastructure Opportunities

Modern industrial activity increasingly depends on digital access, energy reliability, and shared-use infrastructure. Engagement confirmed that gaps in these areas are not just future opportunities, but immediate barriers to business growth. Together, these improvements would help reposition industrial land from a constraint to an enabler of small business growth and innovation, particularly in sectors such as aquaculture, food production, light manufacturing, and trades.

Digital connectivity:

Stakeholders consistently raised concerns about patchy telecommunications and NBN reliability, especially in St Helens and Fingal. Even modest upgrades to mobile coverage, broadband performance, or Wi-Fi-ready industrial areas would directly support new business models, including home-based, hybrid, and creative enterprises that currently struggle to operate effectively.

Energy:

Recent data from TasNetworks indicates that the townships of Break O'Day have reasonable capacity within the existing network. However, some businesses highlighted unreliable electricity supply and power surges as critical issues. The growing importance of energy security and resilience means there is scope for Council to explore local renewable energy generation or microgrid solutions, particularly in new light industrial developments, to provide more reliable, sustainable, and locally managed energy for small operators.

Stormwater management:

Stakeholders and Council raised stormwater as a significant challenge in the region generally, and the St Helens industrial precinct specifically. While Specific Area Plans provide requirements for developers, these provisions tend to shift responsibility and cost onto individual businesses rather than addressing stormwater in a coordinated way. There is an opportunity for Council to take a more proactive and precinct-scale approach to stormwater management, ensuring that future industrial areas are serviced upfront and reducing both costs and risks for individual operators.

Shared-use facilities:

Stakeholders expressed support for incubator-style hubs or shared-use industrial facilities in St Helens. These could provide workshop bays, storage, secure digital access, and flexible leases, making it easier for new enterprises and trades to establish themselves and manage costs.

8.3 Place and Precinct Design Opportunities

As townships such as St Helens, Scamander, and St Marys grow, there is increasing pressure to provide appropriate employment land close to where people live. Despite this, St Helens is already at capacity, and the absence of well-located alternatives has forced some businesses to operate from residential or rural land, often in non-compliant or inefficient conditions.

Future industrial precincts should be smaller in scale, flexible in format, and designed to contemporary standards. Engagement highlighted frustration with ad hoc planning in existing areas, where inadequate stormwater and parking provision has increased costs for individual businesses. Stakeholders stressed the importance of ensuring shared infrastructure is delivered at the precinct level, rather than leaving developers to manage essential services piecemeal.

- Modern precinct design should also incorporate:
- Defined streetscapes, landscaping, and visual buffers
- High-quality, small-format buildings suited to trades, storage, and workshops
- Flexible zoning that allows a mix of employment types, including storage, light manufacturing, and service industries
- Pedestrian access, signage, and support for active transport
- Serviced lots with stormwater, utilities, and reliable digital access

This approach would improve the presentation and functionality of industrial land—helping reposition it as a positive contributor to innovation and enterprise—while also reducing risks and costs for businesses.

CASE STUDY: Byron Bay Arts and Industry Estate

The Byron Bay Arts and Industry Estate was established in the early 1970s and has transformed from a traditional industrial area into a creative and entrepreneurial hub. The Estate works closely with the Bundjalung Arakwal people, the Traditional Custodians of the land, to protect and preserve culturally significant places and the region's identity. This harmonious relationship between the natural, economic, and built environment and the spirit of the Northern Rivers Region is celebrated within the community.

Integrating Traditional Industrial Activity with Creative and Emerging Sectors

Supported by flexible land use, collaborative governance, and strategic planning, the Byron Bay Arts and Industry Estate successfully integrates industrial tools with a strong creative identity. The Estate has welcomed a mixed-use zoning strategy which integrates residential and commercial uses, providing a unique blend of activities.

While this transformation has brought energy and diversity to the Estate¹, it has introduced challenges including:

- Congestion
- Infrastructure strain
- Environmental pressures

To face these challenges, a comprehensive Precinct Plan was developed. The plan provides a long-term vision balancing growth with environmental and cultural values. Key sustainability goals include preserving Wallum vegetation, improving water management, and reducing environmental impacts through thoughtful land use. The Precinct Plan focuses on five key themes:

- Creative Economy
- Mobility and Access
- Environment and Climate
- Land Use
- Built Form, Character, and Density

Relevance to Break O'Day Industrial Study

The Byron Bay Arts and Industry Estate demonstrates how flexible, mixed-use zoning and strategic planning can successfully support economic diversification, creative industries, and sustainable development. It also outlines how creative, and heritage focused industries can deliver strong local engagement and meaningful contributions to the liveability, tourism, and regional identity of an area. The transformation from a traditional industrial area into a vibrant, environmentally conscious and culturally integrated creative estate aligns with Break O'Day's goals of supporting emerging sectors, enhancing liveability, and fostering local employment. Additionally, the focus on stakeholder engagement, environmental protection, and infrastructure upgrades provides practical insights into developing industrial land in a way that balances economic growth with community and environmental values.

Figure 15 Byron Bay Arts and Industry Estate



Source: Google Maps, 2025

¹ www.byron.nsw.gov.au

CASE STUDY: The Mill Castlemaine

By re-imagining the 1875 Castlemaine Woollen Mill into an artisan precinct, The Mill Castlemaine blended its rich industrial heritage with a dynamic and creative economy. After being purchased by Victoria Carpets in 1993, the site continued operating until 2013. The Mill was subsequently sold to its current owners in 2014.²

Integrating Traditional Industrial Activity with Creative and Emerging Sectors

When the site was purchased in 2014, the developers embraced the industrial history by preserving the original features including brick walls, steel beams, and spacious layouts. Across the site, buildings range from 1875 to 1993 due to three fires during its woollen mill history. This adaptive reuse allowed for a seamless integration of traditional structures with contemporary industries.

The Mill Castlemaine currently supports over 40 small business across food production, food and beverage, art, health and wellness, retail, other services and other manufacturing sectors. The former manufacturing site now supports artisan makers and promotes a collaborative, inclusive community that attracts locals and tourists. The Mill has become a vibrant hub that respects and honours its industrial past while building a dynamic future.

Addressing Challenges

The redevelopment of The Mill Castlemaine has faced ongoing challenges such as:

- Derelict infrastructure
- Heritage preservation constraints
- Economic uncertainty for tenants

Through strategic land use planning and community led initiatives, these challenges can be used as opportunities. The Adaptive Reuse Strategy focuses on minimal demolition and maximum preservation of industrial heritage. The gradual development process allowed The Mill to grow in response to the evolving needs of tenants and the local communities. This adaptive approach revitalised the site and provided a strong model for revitalising underutilised industrial areas in a way which honours the heritage and supports sustainable local communities.

Relevance to Break O'Day Industrial Study

The Mill Castlemaine demonstrates how adaptive reuse of industrial sites can support economic diversification, preserve the industrial heritage, and promote a vibrant, locally grounded economy. By transforming the former Castlemaine Woollen Mill into a thriving hub for artisan food, creative industries, and local services, The Mill highlights the potential to support low-output, high-engagement sectors such as food production, arts, wellness, and tourism. These sectors are increasingly significant in Break O'Day's evolving economic landscape. The Mill's emphasis on preserving the industrial heritage, flexible tenancy, and fostering collaboration between diverse small businesses aligns with Break O'Day's goals of supporting sustainable growth, place-making, and innovation. By turning challenges such as ageing infrastructure into opportunities, The Mill provides insights into how underutilised industrial land can be revitalised.

Figure 16 The Mill Castlemaine



Source: Google Maps Streetview, 2025

² millcastlemaine.com.au

9. SITE ASSESSMENT AND FUTURE OPTIONS

The preceding analysis indicates that future industrial land demand in Break O'Day is likely to be modest, incremental and place-specific. Demand is strongest in St Helens, where the existing industrial precinct is at or near capacity, reflecting its role as the largest town in the municipality. Stakeholder feedback also identified a need for smaller, flexible premises, storage and trade-based spaces. In Scamander/Beaumaris, demand is influenced by its status as the fastest growing township in the LGA, with no current industrial land supply and increasing need for local-serving industrial uses linked to population growth, tourism and trades. In St Marys, demand is expected to be more stable and local-serving, reflecting a relatively steady population and a different growth profile to Scamander/Beaumaris. In Fingal, current demand is limited, but road, rail and energy infrastructure provide longer-term strategic value if a larger or specialised industrial opportunity emerges.

On this basis, the study does not identify a single municipality-wide industrial land requirement. Instead, it identifies a staged set of future land options that respond to different township roles, infrastructure conditions and levels of demand.

To translate these findings into practical planning outcomes, a site assessment was undertaken to identify where future industrial development could realistically occur. The purpose of the site assessment is to identify a small number of realistic industrial land opportunities capable of supporting future planning scheme amendments and a long-term industrial land strategy for Break O'Day. The assessment moved from a broad initial pool of potential sites to a more focused evaluation of strategic investigation areas. Rather than assessing every parcel in

isolation, the approach groups sites into logical areas that could support future industrial development or expansion.

The site assessment is structured around the different roles of St Helens, Scamander/Beaumaris, St Marys and Fingal. These township roles informed both the site filtering process and the assessment of each investigation area. The site identification process is summarised below, with further methodological detail provided in Appendix C.



9.1 Township Industrial Land Framework

Industrial land demand and strategic roles differ across the Break O'Day municipality. The site assessment therefore considered each township in the context of its role within the local economy and settlement structure.

St Helens

St Helens is the primary employment centre in the municipality and contains the region's main industrial area. The audit of existing industrial land confirms that the St Helens industrial precinct is operating at or near capacity, with limited opportunities for additional development within the existing estate. The strategy for St Helens therefore focuses on:

- Intensification of the existing industrial estate where possible
- Logical outward expansion of the current industrial area
- Identification of secondary sites that may support specialised uses such as storage or small workshops
- Longer-term strategic land reserves that could accommodate future demand if required.

Fingal

Industrial demand in Fingal is currently limited. However, the township has several characteristics that give it potential strategic industrial value over the longer term. These include:

- The presence of the active railway corridor
- Proximity to the Duncan Colliery
- Location on the western side of St Marys Pass.

Sites identified in Fingal are therefore treated as long-term strategic opportunities, likely for larger new anchor industries rather than immediate rezoning candidates. During the filtering

process, priority was given to sites adjacent to the railway corridor where industrial activity would be most logically located.

St Marys

St Marys currently has limited industrial activity and no dedicated industrial land supply. However, its location along the Esk Highway and its role as a service centre for surrounding rural areas means that some industrial capacity may be appropriate in the future.

Given the limited demonstrated demand and the small scale of the township, greater emphasis was placed on identifying locations with reasonable proximity to existing infrastructure and continuity with the existing township boundaries. This approach helps ensure that any future industrial land is practical to service and integrated with the settlement rather than occurring as isolated sites with limited feasibility for development.

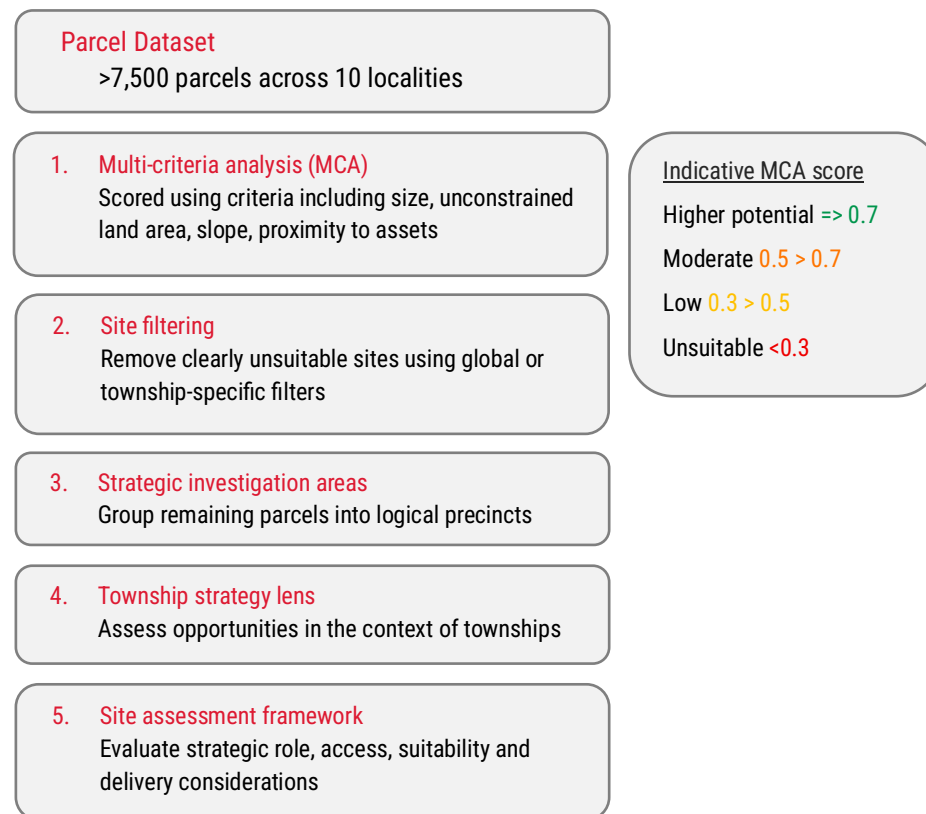
Scamander / Beaumaris

Scamander / Beaumaris are primarily residential and tourism-focused townships. However, combined they have become the second largest township in the municipality and are also the fastest growing.

The draft Scamander–Beaumaris Structure Plan identifies emerging demand for small-scale service and employment land to support the local community and tourism economy.

9.2 Site Identification and Filtering Process

The process used to identify and refine potential industrial land opportunities moved from a broad initial screening to a structured strategic assessment. The process is summarised below with detail provided in Appendix C.



Step 1 – Multi-Criteria Analysis (MCA)

A Multi-Criteria Analysis (MCA) was applied across parcels throughout the municipality to identify locations with potential industrial suitability. The analysis considered factors such as infrastructure access, land characteristics, connectivity and planning context.

Step 2 – Council Review and Refinement

Council officers reviewed the MCA results to incorporate local operational knowledge, known site constraints and practical delivery considerations that may not be fully captured in the spatial data. This helped refine the initial outputs and identify a more realistic long list of potential sites for further consideration. The final shortlisted investigation areas were then tested through the documented site filtering and assessment framework.

Step 3 – Site Filtering

The long list of sites was then filtered to remove locations that were less suitable for industrial development.

Filtering applied both global criteria and township-specific considerations informed by the township strategies outlined above. Global filtering criteria included criteria such as minimum functional (contiguous) site size, logical relationship to settlements, and reasonable proximity to higher-order roads.

Township-specific filtering criteria were also applied. For example, the focus on the railway as the core asset for Fingal meant only sites adjacent to the rail corridor were considered in the filtered list.

Step 4 – Strategic Investigation Areas

Rather than assessing individual parcels in isolation, the remaining sites were grouped into Strategic Investigation Areas within each township.

This reflects how industrial land typically functions in practice, where multiple parcels may collectively form a viable industrial precinct or expansion area. Parcels within a strategic investigation area do not need to be contiguous but should represent a logical cluster or expansion opportunity.

Step 5 – Assessment and Classification of Investigation Areas

The identified investigation areas were assessed using a consistent framework considering:

- Strategic role
- Access and connectivity
- Infrastructure servicing
- Land capability and constraints
- Industrial suitability
- Delivery and implementation considerations

Based on this assessment, investigation areas were classified into three broad categories:

- Priority Industrial Expansion Areas – suitable for near-term planning scheme amendments.
- Priority Future Industrial Precinct – new industrial area not adjacent to existing precincts.
- Conditional Opportunity Areas – sites that may become suitable depending on demand or infrastructure improvements.

- Strategic Monitor Areas – long-term opportunities that should be monitored but do not justify rezoning in the near term.

9.3 Assessment of Investigation Areas

The site assessment began with a broader pool of potential sites identified through the MCA process and Council officer review. These sites were then progressively filtered using township-specific strategy considerations, infrastructure feasibility, relationship to existing settlements, access, constraints and likely demand.

The investigation areas assessed in this section represent the shortlisted strategic opportunities considered most relevant to future industrial land planning in Break O'Day. They are not intended to represent every parcel considered through the initial screening process.

Summary of Investigation Areas

Investigation Area	Parcels	MCA result	Gross area	Potentially developable area	Indicative lots / yield	Likely role	Classification
St Helens Industrial Estate Expansion	5	0.81, 0.83, 0.80, 0.91, 0.88	21.6 ha	13.5 ha	25–45 lots	Staged precinct expansion	Priority Industrial Expansion Area
St Helens South Expansion	1	0.82	7.4 ha	2.7 ha	One or small number of larger depot/storage uses	Secondary service/storage area	Conditional Opportunity Area
Scamander	1	0.82	33.6 ha	Initial 5–10 ha envelope	10–35 lots	Future local service precinct	Priority Future Industrial Precinct
St Marys	1	0.95	4.1 ha	3.3 ha	8–12 lots	Small local service precinct	Conditional Opportunity Area
Fingal Outer West	1	0.84	277 ha	Site-specific	One or several larger users	Long-term strategic industrial reserve	Strategic Monitor Area

Investigation Area: St Helens Industrial Estate Expansion

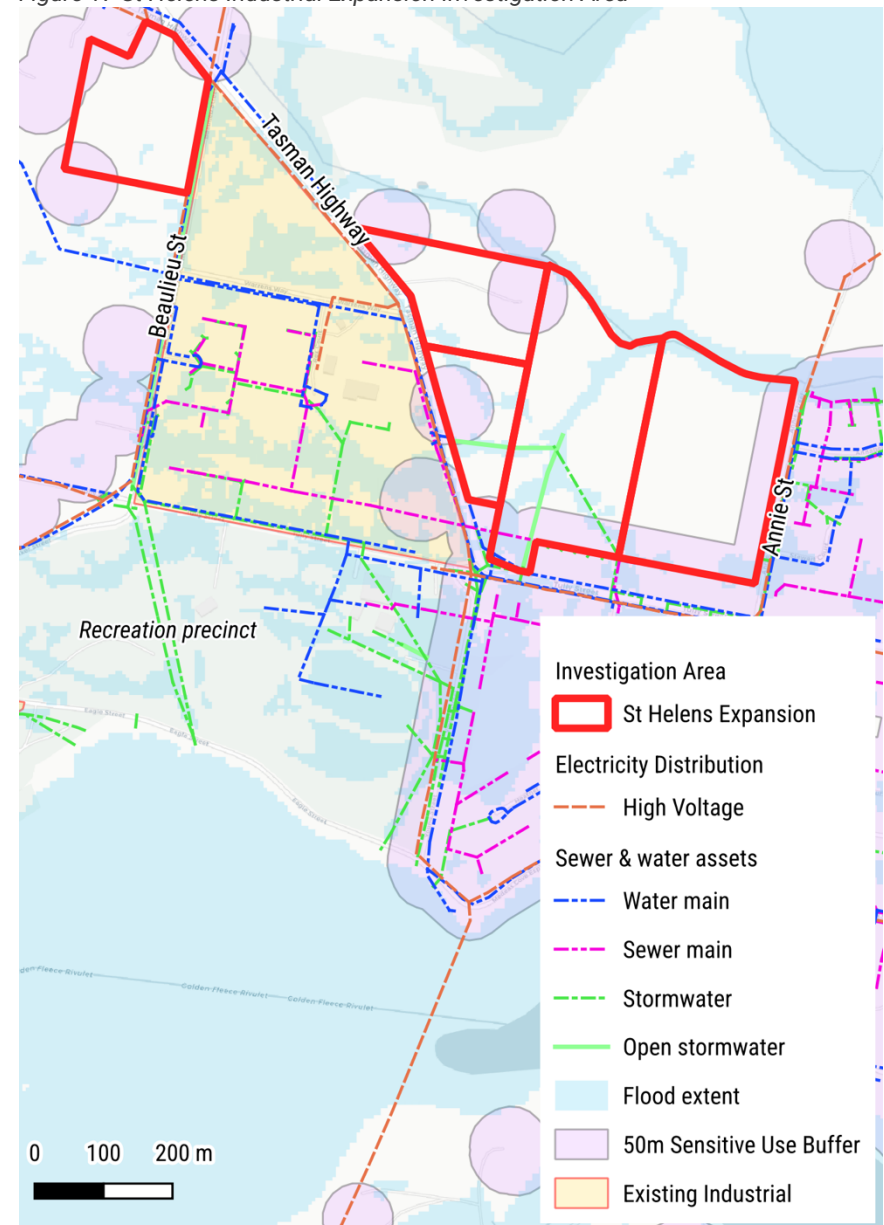
Overview:

The St Helens Industrial Estate Expansion investigation area includes land to both the west and east of the existing St Helens Industrial Estate. Together, these areas provide a staged opportunity to expand the municipality's primary industrial precinct while maintaining a direct relationship with existing infrastructure, road access and industrial activity.

The investigation area comprises two distinct components. The western parcel is a smaller vacant site of approximately 3.6 hectares with direct frontage to both the Tasman Highway and Beaulieu Street, one of the main access roads into the existing industrial estate. This parcel includes some sloping land, which may influence future layout and developable area. The eastern expansion area comprises four parcels with a combined area of approximately 18.0 hectares and provides the larger medium-to-long-term expansion opportunity.

Together, the precinct has a combined gross area of approximately 21.6 hectares. After accounting for flood-prone land and indicative 50 metre residential buffers, approximately 13.5 hectares remains potentially developable. Both areas are subject to scenic road corridor considerations along the Tasman Highway frontage, meaning future development would need to manage visual presentation and landscape interface. Overall, the area provides a substantial opportunity to accommodate future industrial growth through staged expansion of the existing estate rather than creating a new isolated industrial area.

Figure 17 St Helens Industrial Expansion Investigation Area



Site Assessment:

Strategic Role

The St Helens Industrial Estate Expansion area is intended to provide a future growth option for industrial land in Break O'Day. Consistent with the broader strategy for St Helens, the area supports the continued role of the township as the municipality's main industrial and employment hub.

The western parcel provides a smaller and more immediate expansion opportunity due to its size, vacant status, connection to Beaulieu Street, although future development would still need to address access, servicing, buffers and scenic interface considerations. The eastern expansion area provides larger medium-to-longer-term capacity and could accommodate a broader range of local-serving industrial uses, including trade services, light manufacturing, marine-related services, storage and contractor-based businesses.

Together, these areas are likely to represent the most practical expansion opportunities for the main St Helens Industrial Estate identified through this study. Further expansion options are limited by the township's recreation precinct to the south, residential land to the east, and more distant, vegetated and topographically constrained land to the north. This reinforces the importance of protecting and planning these areas carefully, as they may represent one of the last logical opportunities to expand the existing estate.

Access and Connectivity

The western parcel has frontage to both the Tasman Highway and Beaulieu Street, providing strong exposure and a direct relationship to the existing industrial estate. Access from Beaulieu Street is likely to be preferable to a new direct access point from

the Tasman Highway, as it would utilise the existing estate access road and avoid additional access/egress points on the regional road network.

The eastern expansion area is also well-located relative to the existing estate, but access arrangements would require more detailed consideration. The area is separated from the existing estate by the Tasman Highway and also has frontage to Annie Street to the east. However, access via Annie Street or Tully Street could direct industrial traffic past residential areas, so future planning should carefully consider access points, internal road layout and traffic movement to minimise impacts on surrounding residential streets.

Infrastructure Servicing

The investigation area benefits from proximity to existing water, sewer and electricity infrastructure associated with the current industrial estate and surrounding township. This improves the relative feasibility of future industrial development compared with more isolated greenfield locations, although detailed servicing capacity and connection requirements have not been assessed as part of this study.

The western parcel has direct access to existing road frontage and nearby water and electricity services, although sewer infrastructure would need to be extended to support development. Future planning should also consider local stormwater conditions, including overland flow issues identified around Beaulieu Street and the existing industrial estate.

The eastern expansion area appears to have access to nearby infrastructure, including sewer infrastructure in the vicinity of Annie Street and a pump station east of the site. Mosquito Creek to the north may provide a logical stormwater outlet, subject to detailed drainage design and environmental requirements. If

developed as a larger staged precinct, the area would require coordinated servicing, stormwater management and internal infrastructure planning. This coordinated approach will be important to avoid repeating issues experienced in the existing estate, where stormwater and flood-related requirements have often been addressed on a site-by-site basis by individual landowners.

Constraints and Suitability

There is no single unconstrained location for future industrial land expansion in St Helens. Most potential areas are affected to some degree by flooding, servicing requirements, residential interfaces, or separation from existing infrastructure. On this basis, suitability has been assessed in terms of whether constraints can be managed through planning, design and staging, rather than whether sites are entirely unconstrained.

The principal constraints affecting this precinct are flood-prone land, residential interface buffers and scenic road corridor considerations along the Tasman Highway. These constraints are more prominent in the eastern expansion area, where residential buffers and flood mapping reduce the total developable area and will influence future layout, staging and land use intensity.

The western parcel is less constrained and has a clearer relationship to the existing estate access network, although slope, sewer extension, access design and highway presentation will need to be considered. Across the broader precinct, future planning should incorporate residential buffers, stormwater management, landscaping and lower-intensity industrial activities along sensitive edges.

Indicative Yield

The combined investigation area has a gross area of approximately 21.6 hectares, comprising:

- Western parcel: approximately 3.6 hectares, with around 2.8 hectares potentially unconstrained.
- Eastern expansion area: approximately 18.0 hectares, with around 10.7 hectares potentially unconstrained.

This provides a combined potentially unconstrained area of approximately 13.5 hectares after accounting for flood-prone land and indicative 50 metre residential buffers.

Based on the existing industrial lot pattern in St Helens, this could accommodate approximately 25 to 45 industrial lots, depending on subdivision layout, servicing requirements, road design, buffers and market demand. The western parcel may provide a smaller number of near-term lots, while the eastern expansion area provides larger staged capacity over the medium to longer term. At the higher end of the indicative yield range, the precinct could almost double the current functional lot capacity of the existing industrial estate, which contains just over 40 industrial sites excluding smaller storage units.

Overall Assessment

The St Helens Industrial Estate - Precinct Expansion area represents the most logical opportunity to accommodate future industrial growth within Break O'Day. It builds directly from the existing industrial estate, benefits from proximity to infrastructure and enables land supply to be expanded progressively in response to demand.

The western parcel provides a smaller and more immediate expansion opportunity, subject to access, servicing, slope and scenic interface considerations. The eastern expansion area provides larger medium-to-longer-term capacity but would require

more coordinated planning to address access, internal roads, servicing, stormwater, flooding and residential interfaces.

While the precinct is not unconstrained, it provides a practical and strategically aligned pathway for expanding the existing estate. Importantly, it avoids the need to identify more isolated industrial land elsewhere in the municipality where servicing and activation are likely to be less feasible.

Classification

Priority Industrial Expansion Area

Investigation Area: St Helens South Expansion

Overview:

The St Helens South Expansion investigation area is located west of the existing southern industrial-zoned area on Argonaut Road, which currently accommodates Council's transfer station, Council's St Helens Depot, and a State Government Parks and Wildlife field centre. The investigation area is part of a larger parcel that is split by Argonaut Road, with an existing dwelling located on the northern portion and the vacant southern portion adjoining the existing industrial land.

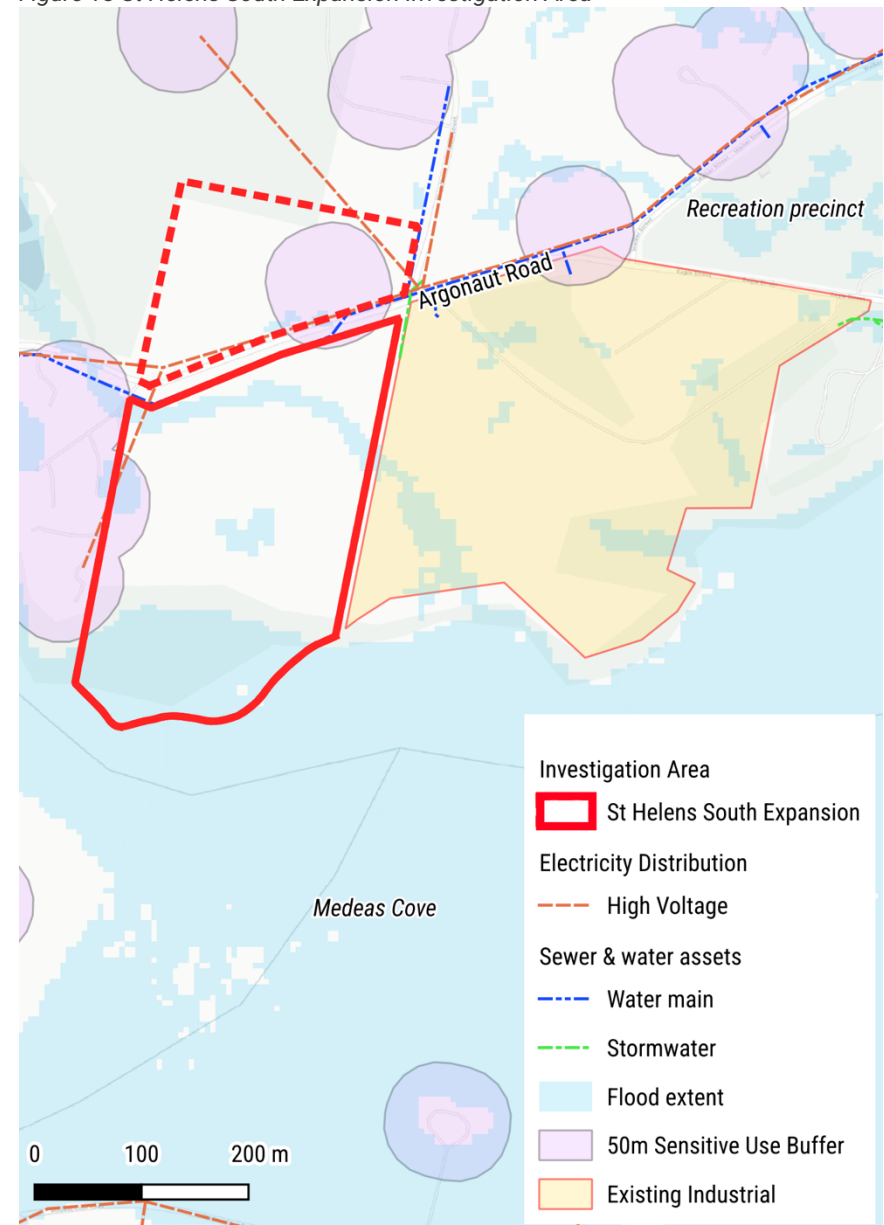
The southern portion provides a potential opportunity for a modest expansion of the existing industrial/government services precinct. However, its suitability is influenced by environmental and topographic constraints, including proximity to Medeas Cove, mapped coastal and waterway protection areas, priority vegetation, and a mapped watercourse traversing the northern part of the site.

Site Assessment:

Strategic Role

The St Helens Southern Industrial Area Western Expansion area provides a secondary industrial opportunity that is distinct from the main St Helens Industrial Estate. Its role is likely to be more specialised and limited, supporting activities that are compatible with the existing transfer station, Council depot and government service uses rather than accommodating broad-based industrial growth. The site may be suitable for depot-style uses, storage, service infrastructure or other lower-intensity industrial activities that benefit from separation from residential areas and proximity to existing industrial-zoned land.

Figure 18 St Helens South Expansion Investigation Area



Access and Connectivity

The site is accessed from Argonaut Road and has a direct relationship with the existing southern industrial/government services precinct. However, Argonaut Road is more local in character and less directly connected to the broader industrial estate network than the main St Helens Industrial Estate.

Future access arrangements would need to consider safe vehicle movement along Argonaut Road and access to the main developable area within the southern portion of the site.

Infrastructure Servicing

The site has access to water infrastructure along Argonaut Road and high-voltage electricity infrastructure near the road frontage. Reticulated sewer infrastructure is not available in this location, so future development would need to confirm whether on-site wastewater treatment is suitable for the intended use.

Given the site's proximity to Medeas Cove, stormwater management is likely to focus less on discharge availability and more on water quality, treatment and protection of the receiving environment. These matters would need to be addressed through future site planning.

Constraints and Suitability

The key constraints affecting the site are environmental, drainage and servicing related. The southern portion is located near Medeas Cove and is affected by mapped coastal, waterway and priority vegetation considerations along its southern extent. A mapped watercourse also traverses the northern part of the site and will need to be considered in future site layout, access, stormwater design and environmental management.

These constraints reduce the potentially developable area to approximately 2.7 hectares and will influence future layout, access, drainage and land use intensity. The absence of reticulated sewer further limits the suitability of the site for more intensive workshop or employment-generating activities unless appropriate wastewater solutions can be demonstrated.

On this basis, the site is best suited to lower-intensity industrial uses such as storage, depot, yard-based or service infrastructure activities that can avoid sensitive areas, manage stormwater quality and operate within a constrained developable footprint.

Indicative Yield

The southern portion of the investigation area has a total area of approximately 7.4 hectares, with around 2.7 hectares identified as potentially unconstrained after accounting for environmental overlays and buffers. Given the constrained developable area and the site's relationship to existing depot and transfer station uses, it is likely to be better suited to one or a small number of larger depot, storage or service-based uses rather than a conventional multi-lot industrial subdivision.

Overall Assessment

The St Helens Southern Industrial Area Western Expansion area provides a logical but limited opportunity to extend the existing southern industrial/government services precinct. Its relationship to the transfer station, Council depot and State Government field centre supports a potential role for depot-style, storage, yard-based or service infrastructure uses.

However, the site is constrained by environmental overlays, a mapped watercourse, proximity to Medeas Cove and the absence of reticulated sewer. These factors reduce the developable area

and make the site less suited to broad industrial subdivision or more intensive employment-generating industrial activity.

The site should therefore be considered a secondary industrial opportunity for St Helens, focused on lower-intensity uses that can operate within a constrained footprint and appropriately manage wastewater and stormwater quality.

Classification

Conditional Opportunity Area

Investigation Area: Scamander

Overview:

The Scamander investigation area is located west of Scamander along Coach Road and comprises the government-owned parcel containing the existing transfer station. The parcel has a gross area of approximately 33.6 hectares. The adjacent parcel to the north contains the town's wastewater treatment plant.

The area was identified as a long-term opportunity due to its government ownership, existing infrastructure role, proximity to water and electricity infrastructure, and relationship to the growing Scamander/Beaumaris settlement area. Scamander is the fastest growing township in Break O'Day, and the draft Scamander-Beaumaris Structure Plan identifies a need for additional employment land to support local services and reduce reliance on St Helens.

The parcel should be understood as an opportunity to identify a smaller staged development envelope within a substantial government-owned landholding, rather than as a single large industrial estate.

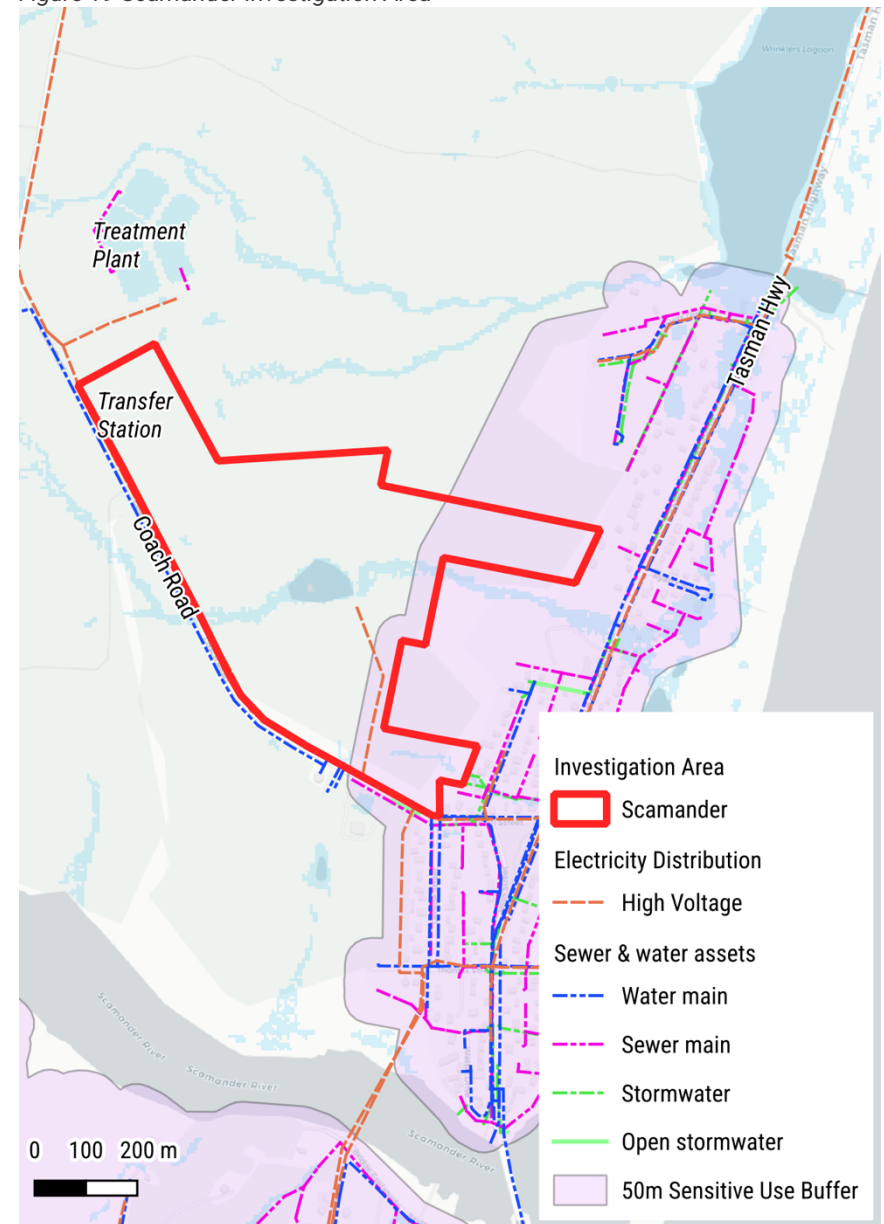
Site Assessment:

Strategic Role

The precinct could provide a future secondary industrial and service location for Scamander/Beaumaris. Its role would be to accommodate local-serving industrial, storage, trade and service-based activities that currently rely on St Helens or operate from less suitable locations.

The site's scale and ownership support staged release, with longer-term expansion retained if demand and technical assessments support further land supply.

Figure 19 Scamander Investigation Area



Access and Connectivity

The site is accessed from Coach Road, which already accommodates vehicle movements associated with the transfer station. No specific access constraints are currently known, although any future industrial expansion would need to confirm road capacity, access design and heavy vehicle movement requirements.

The location provides reasonable access to Scamander and Beaumaris and is sufficiently separated from the main residential area to accommodate activities that may require a greater degree of operational separation.

Infrastructure Servicing

The investigation area benefits from proximity to existing infrastructure, including water infrastructure along Coach Road and high-voltage electricity infrastructure. The nearby wastewater treatment plant to the north may also provide a strategic servicing context, although proximity to wastewater infrastructure does not automatically confirm servicing feasibility.

Future planning would need to confirm wastewater connection options, system capacity, any requirement for pump station or pressure sewer infrastructure, trade waste implications and TasWater requirements. Future development would also need to address stormwater quality, treatment and environmental management, particularly given the presence of mapped watercourses and the site's broader environmental setting.

Constraints and Suitability

The main constraints affecting the site are vegetation, mapped watercourses, existing transfer station operations and interfaces with nearby residential areas. The extent to which vegetation would limit development requires ecological assessment.

The existing transfer station does not necessarily preclude industrial activity and may support the site's role as a broader service and infrastructure precinct. However, future planning would need to confirm operational buffers, odour considerations, access arrangements and land use compatibility, particularly where industrial activities are proposed near existing infrastructure uses or residential areas.

Government ownership is a strategic advantage because it provides a secure long-term landholding and an opportunity for coordinated public-sector planning. However, it also introduces implementation risks, as any future release, lease, transfer or change in use would require agreement with the relevant landholding and infrastructure agencies and may be subject to Crown land or government property disposal processes.

Indicative Yield

The investigation area has a gross area of approximately 33.6 hectares. The existing transfer station occupies approximately 3.7 hectares, while indicative residential buffers affect approximately 8.0 hectares of the parcel.

After excluding these areas, approximately 21.9 hectares remains before accounting for vegetation, watercourses, internal roads, servicing requirements and other site-specific constraints.

The scale of the landholding is substantial and could provide industrial land capacity well beyond likely short-to-medium-term demand. A staged approach is therefore recommended. An initial development envelope in the order of 5 to 10 hectares may be appropriate for further testing. Based on the existing St Helens industrial lot pattern, this could accommodate approximately 10 to 35 small to medium industrial lots, depending on subdivision layout, servicing requirements, buffers and market demand.

Longer-term expansion could be retained as an option if demand is demonstrated.

Overall Assessment

The Scamander Service and Industrial Precinct investigation area provides a strong long-term opportunity to establish a secondary industrial and service precinct outside St Helens. Its government ownership, infrastructure context and proximity to the municipality's fastest growing township provide a sound basis for further investigation.

While the parcel is substantial, future industrial use would depend on resolving vegetation, servicing, wastewater, trade waste, access, watercourse and buffer considerations. These matters should be addressed through a staged planning process that identifies a suitable initial development envelope rather than assuming the full parcel would be required or available for industrial use.

Overall, the site has significant potential to support future local employment land in Scamander/Beaumaris and should be advanced as a priority future industrial precinct. It provides an important long-term option beyond St Helens, where remaining expansion opportunities are limited, and could become increasingly important if the municipality continues to grow and St Helens' available industrial land is progressively absorbed.

Classification

Priority Future Industrial Precinct

Investigation Area: St Marys

Overview:

The St Marys investigation area is located to the south of the township, adjacent to the golf course and pacing track. The site comprises a single parcel of approximately 4.1 hectares, with an estimated developable area of around 3.3 hectares. The area was identified through the site selection process due to its proximity to existing infrastructure and its logical relationship to the township boundary.

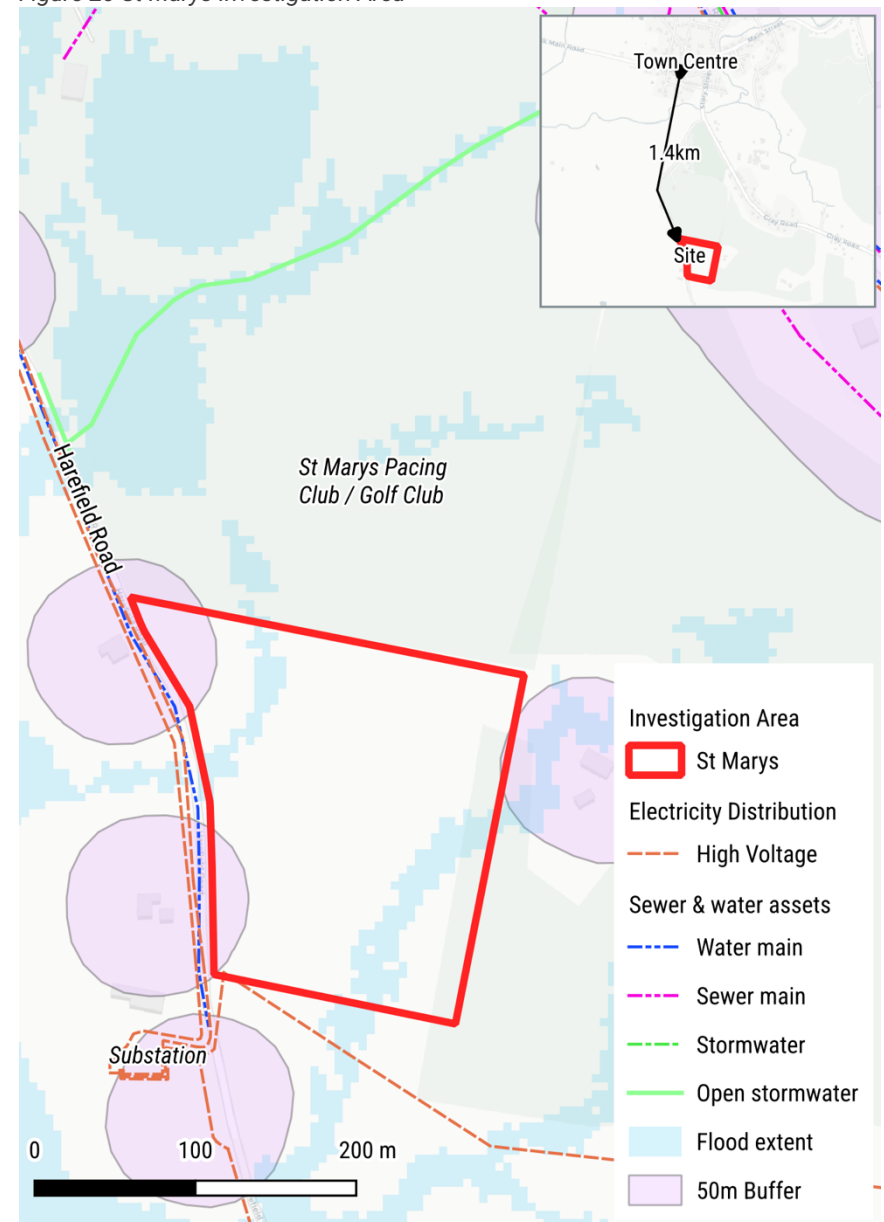
The site is located within close proximity to existing water, electricity and sewer infrastructure, including an electricity substation located opposite the site. This positioning supports the potential for small-scale industrial or service-based activities that are integrated with the township.

Site Assessment:

Strategic Role

The St Marys investigation area is intended to support small-scale industrial and service-based activities that meet local needs and complement the township's role as a rural service centre. Consistent with the broader strategy for St Marys, the site is not intended to accommodate large industrial uses, but rather to provide a modest supply of industrial land that is well-located, serviceable and integrated with the existing settlement. The site may support uses such as trade services, small workshops, storage and creative or home-based business activities.

Figure 20 St Marys Investigation Area



Access and Connectivity

The site is accessed via Harefield Road, which connects to the Esk Highway from Gray Road. While the site is relatively close to the highway, access for industrial traffic would occur through local roads, which may limit suitability for higher traffic-generating uses. The location is, however, appropriate for lower-intensity industrial and service-based activities that primarily serve the local area.

Infrastructure Servicing

The site benefits from proximity to existing infrastructure, including water and electricity services, with an electricity substation located opposite the site. Sewer infrastructure is available in the vicinity of the trotting track and may be capable of extension to service the site. These factors support the feasibility of servicing the site for small-scale industrial development which is critical in unproven or low demand settings such as regional townships.

Constraints and Suitability

Parts of the surrounding area are affected by flood-prone land; however, the majority of the investigation area is outside the primary flood extent. The site is relatively flat and unconstrained compared to other areas in and around St Marys. Its location adjacent to the township and separation from residentially zoned land, together with the ability to achieve buffers from existing dwellings supports its suitability for small-scale industrial uses.

Indicative Yield

The investigation area comprises approximately 4.1 hectares, with an estimated developable area of around 3.3 hectares. Based on typical lot sizes in regional industrial areas, the site could accommodate approximately 8–12 small industrial lots, depending on subdivision layout and servicing requirements.

Overall Assessment

The St Marys investigation area provides a practical and serviceable location for small-scale industrial development that is integrated with the township. While demand for industrial land in St Marys is currently limited, the site offers a logical and feasible opportunity to accommodate future local service and business needs. Its proximity to existing infrastructure and continuity with the settlement reduces the risk of identifying isolated industrial land that is difficult to service and remains undeveloped over the long term.

Classification

Conditional Opportunity Area

Investigation Area: Fingal Outer West

Overview:

The Fingal Outer West investigation area is located approximately 8 km west of the Fingal township along the Esk Highway. The site was identified through the site selection process due to its relatively high MCA score and its strategic location adjacent to both the Esk Highway and the Fingal rail corridor.

The investigation area comprises a single large parcel of over 277ha with direct access to road and rail infrastructure. The scale of the site and its separation from residential areas provide flexibility for larger industrial or logistics-related activities that may benefit from freight connectivity.

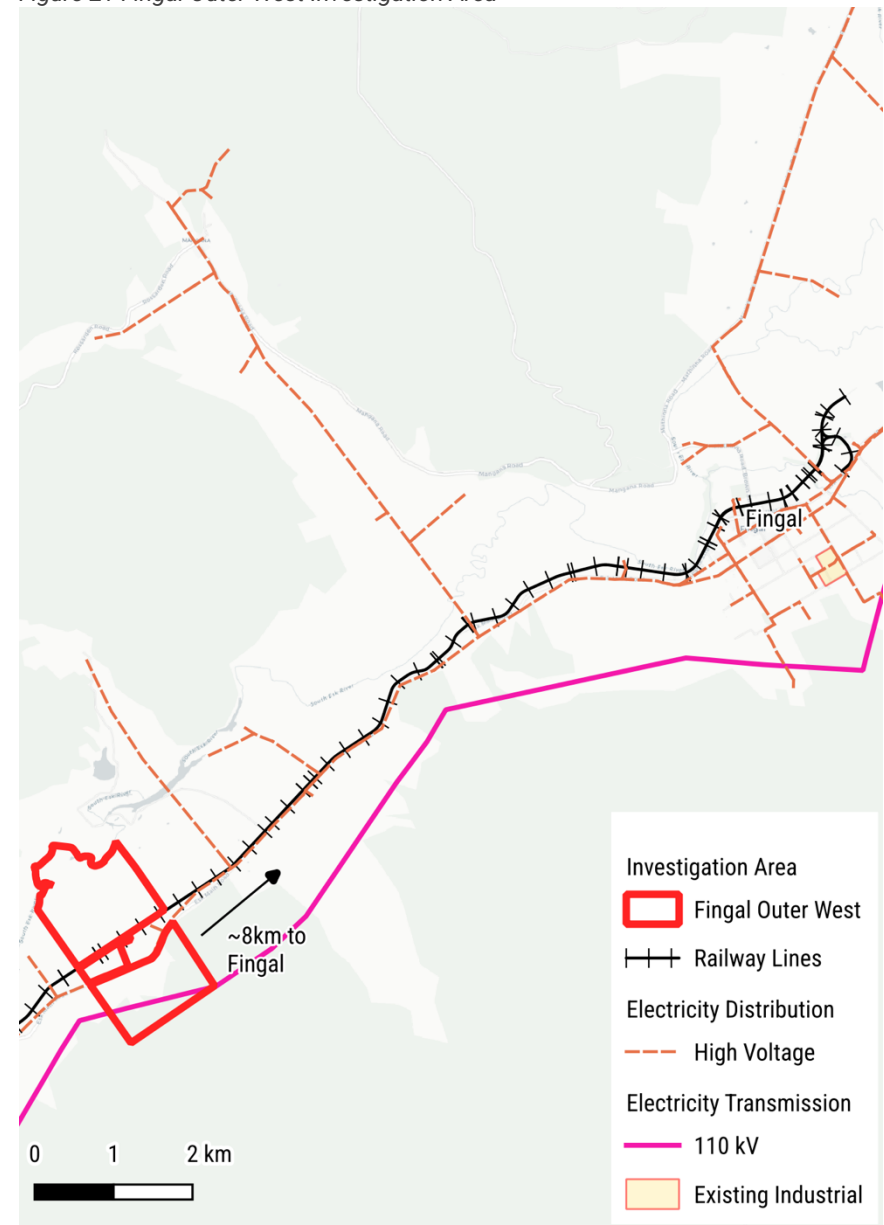
While sewer infrastructure is not currently available, the site's size and strategic transport connections mean it may represent a longer-term industrial opportunity should demand emerge for larger or transport-oriented industrial uses.

Site Assessment:

Strategic Role

The Fingal Outer West investigation area represents a long-term strategic industrial opportunity centred on its adjacency to the Fingal rail corridor and access to the Esk Highway. This combination of rail and highway infrastructure is uncommon elsewhere in the municipality and may support industrial activities that benefit from freight connectivity and larger land areas. While demand for industrial land in Fingal is currently limited, the site could accommodate larger or specialised industrial uses if they emerge, such as resource-related activities, logistics operations, or agricultural processing and bio-energy facilities.

Figure 21 Fingal Outer West Investigation Area



Access and Connectivity

The investigation area has direct frontage to the Esk Highway, providing regional connectivity between Fingal, St Marys and the broader east coast transport network. The site is also located immediately adjacent to the Fingal rail corridor. While rail freight activity is currently limited in the region, the presence of the corridor provides potential long-term freight connectivity for industrial activities that may benefit from rail access.

Infrastructure Servicing

The site is located near higher-capacity electricity infrastructure, including a 110 kV transmission line and separate high-voltage distribution infrastructure. This may provide a strategic advantage for larger or more energy-reliant users, subject to detailed network connection advice from TasNetworks. Reticulated sewer infrastructure is not currently available at the site.

Constraints and Suitability

The surrounding Esk River floodplain constrains much of the broader valley floor; however, the investigation area itself is largely outside the mapped flood extent. The size of the parcel and its separation from existing residential areas also reduce the potential for land use conflict. These characteristics support the suitability of the site for industrial activities that may require larger footprints or operational buffers.

Indicative Yield

The investigation area comprises a single parcel of approximately 277 hectares. The site could accommodate one or several larger industrial users depending on future demand and infrastructure servicing arrangements. Detailed subdivision outcomes would depend on access, servicing and operational requirements of future users.

Overall Assessment

The Fingal Outer West investigation area represents a strategically located long-term industrial opportunity associated with the rail corridor and Esk Highway. While current industrial demand in Fingal is limited and servicing constraints exist, the site provides a rare combination of large land area and transport connectivity within the municipality. The area may therefore provide a suitable location for larger or specialised industrial uses should demand emerge over the longer term.

Classification

Strategic Monitor Area

10. RECOMMENDATIONS

The findings of this study indicate that Break O'Day does not require a single municipality-wide industrial land response. Future demand is likely to be modest, incremental and place-specific, with strongest pressure in St Helens, emerging local service needs in Scamander / Beaumaris, conditional future opportunities in St Marys and St Helens South, and a longer-term strategic opportunity around Fingal.

The recommendations therefore focus on a staged planning and delivery pathway. This includes targeted rezoning where a near-term or medium-term need is evident, protection of longer-term opportunities where demand is uncertain, and coordinated servicing and design actions to ensure that future industrial land is genuinely usable and capable of supporting local business growth.

The recommendations are strategic in nature. They are intended to guide future Local Provisions Schedule amendments, precinct planning, infrastructure investigations, agency engagement and funding priorities. They do not replace the need for future technical investigations, statutory amendment documentation, detailed servicing design or development assessment processes.

Area	Recommended role	Planning pathway	Timing
St Helens Industrial Estate Expansion	Primary staged industrial expansion area for St Helens and the municipality.	Progress a staged amendment to apply the Light Industrial Zone, supported by a precinct structure plan and design / servicing framework.	Near term
Scamander	Future secondary industrial and service precinct for Scamander / Beaumaris, with capacity for larger or more flexible industrial users if demand emerges.	Confirm government landholder support and identify an initial 5 to 10 ha development envelope. Progress a General Industrial Zone amendment for the agreed envelope, subject to servicing, access, environmental and buffer investigations.	Near to medium term
St Helens South	Low-activity light industrial, storage and service area, rather than a broad industrial estate.	Retain as a Conditional Opportunity Area. Consider Light Industrial Zone only if access, wastewater, stormwater quality and environmental constraints can be resolved.	Conditional
St Marys	Small local service precinct if future demand is demonstrated.	Retain as a Conditional Opportunity Area. Consider Light Industrial Zone only where demand, servicing and delivery are confirmed.	Medium term / conditional
Fingal Outer West	Long-term strategic industrial investigation area for larger or specialised users linked to rail, highway and energy infrastructure.	Do not rezone in the near term. Identify as a Strategic Industrial Investigation Area in Council advocacy, regional planning and economic development work.	Conditional / Long term
Existing St Helens Industrial Estate	Continue as the main established industrial estate, with scope for function and presentation improvements.	Support intensification, redevelopment and operational improvements through stormwater, access, presentation and business support actions.	Ongoing

10.1 Detailed Recommendations

Recommendation 1: Progress a staged Light Industrial Zone expansion in St Helens

Council should progress the St Helens Industrial Estate Expansion as the priority near-term industrial land action. The area is the most logical expansion of the municipality's primary industrial precinct, has a direct relationship to existing industrial activity, and provides the clearest pathway for increasing serviced employment land close to the main population and business centre.

The preferred planning pathway is a staged amendment to the Break O'Day Local Provisions Schedule to apply the Light Industrial Zone to the most suitable parts of the investigation area. The Light Industrial Zone is considered the most appropriate fit because future demand in St Helens is expected to be driven by trade services, small workshops, storage, service industry, repair and maintenance, light manufacturing and smaller local enterprises rather than heavy or high-impact industrial activity.

The Light Industrial Zone would also provide a more appropriate transition around residential and scenic interfaces than an extension of General Industrial zoning. It may also allow some lower-intensity storage and trade activities to relocate from the existing General Industrial area over time, improving the function of the older estate and reserving it for activities that require a more conventional industrial setting.

Implementation actions:

- Prepare a precinct structure plan to support the rezoning, showing staging, access, internal road layout, lot mix, buffers, landscape interfaces and stormwater management.
- Prioritise the western parcel as a potential first stage, subject to access from Beaulieu Street, servicing, slope, stormwater and scenic road corridor requirements.
- Plan the eastern expansion area as a medium to longer-term stage, with particular attention to avoiding industrial traffic impacts on residential streets.
- Identify a mix of small and medium lots suitable for workshops, storage, trade services, light manufacturing and service businesses.
- Apply higher presentation and landscape expectations along the Tasman Highway and key residential interfaces.

Recommendation 2: Advance Scamander as a future General Industrial precinct

Council should advance the Scamander investigation area as a future secondary industrial and service precinct for Scamander / Beaumaris. The site has strategic advantages due to its scale, government ownership, separation from most residential areas, proximity to existing infrastructure, and relationship to the fastest growing township area in the municipality.

The recommended pathway is to identify an initial 5 to 10 hectare development envelope within the broader government-owned landholding and, subject to agency agreement and technical investigations, progress an amendment to apply the General Industrial Zone to that envelope. While the Statewide Industrial Land Study identified Scamander / Beaumaris as a potential location for light industrial rezoning, General Industrial zoning is recommended for the defined Scamander envelope because it provides the municipality with a flexible future industrial land option outside St Helens. Unlike the St Helens expansion area, where residential interfaces support a Light Industrial Zone response, the Scamander site's scale, existing infrastructure role and greater separation from the main residential area provide a more suitable setting for a broader range of industrial, service, storage, depot and infrastructure-related uses, subject to detailed precinct planning and buffers.

The recommendation does not imply that the entire 33.6 hectare parcel should be rezoned or developed for industrial purposes. The broader landholding should continue to accommodate infrastructure functions, buffers, environmental management areas and potential long-term expansion if demand is demonstrated.

Implementation actions:

- Commence discussions with the relevant government landholder and infrastructure agencies to confirm whether part of the site can be investigated for industrial release or long-term lease.
- Identify a preferred 5 to 10 hectare initial development envelope that avoids or manages vegetation, watercourses, residential buffers and transfer station interfaces.
- Confirm access requirements from Coach Road and any upgrades required to support industrial vehicle movements.
- Undertake preliminary servicing investigations for water, wastewater, trade waste, power, stormwater and telecommunications.
- Consider whether land required for the transfer station, wastewater-related infrastructure or other public infrastructure should be retained in, or transitioned to, an appropriate utilities or infrastructure planning response rather than being included in the industrial release area.
- Align the precinct planning with the Scamander-Beaumaris Structure Plan and any future regional land use strategy directions.

Recommendation 3: Treat St Helens South as a conditional low-activity Light Industrial / storage opportunity

Council should treat the St Helens South investigation area as a conditional, low-activity industrial and storage opportunity rather than as a general industrial expansion area. The site has a logical relationship to existing industrial and service infrastructure uses along Argonaut Road, but its environmental constraints, lack of reticulated sewer and limited developable area make it unsuitable for broad industrial subdivision.

If progressed, the preferred role would be a low-activity Light Industrial or storage precinct. Potential uses could include secure storage, boat and caravan storage, contractor storage, small yards, low-traffic service activities or other low-intensity industrial uses that can operate within a constrained footprint and manage stormwater and wastewater appropriately.

Implementation actions:

- Retain the site as a Conditional Opportunity Area, with no immediate rezoning unless a clear delivery pathway or defined market need emerges.
- Test whether Light Industrial zoning would be appropriate for the developable portion, subject to wastewater, access, watercourse, coastal, vegetation and stormwater quality investigations.
- Avoid positioning the site as a broad employment precinct or larger multi-lot industrial estate.
- Apply strong screening, fencing and environmental interface principles due to the site proximity to Medeads Cove and mapped environmental constraints.
- Ensure any future use is compatible with the absence of reticulated sewer or can demonstrate an acceptable wastewater solution.

Recommendation 4: Retain St Marys as a conditional local service option

Council should retain the St Marys investigation area as a conditional future local service precinct. The site is relatively logical from a settlement and servicing perspective, but current demand for industrial land in St Marys is limited and may not justify immediate rezoning or infrastructure investment.

The site should be monitored as a future option for small-scale workshops, storage, trade services, creative / maker activities or local service businesses if planning and infrastructure funding opportunities emerge. Any future rezoning should be modest in scale and should be based on a clear delivery pathway.

Implementation actions:

- Do not progress immediate rezoning unless there is a clear delivery pathway, such as grant funding, a Council-led initiative, infrastructure investigation funding, a service extension opportunity, or a specific proponent / landowner proposal.
- Protect the site from incompatible strategic planning decisions that would prevent its future use as a small local service precinct.
- Seek opportunities to package St Marys into broader township, infrastructure or economic development funding programs, particularly where planning investigations, servicing design or infrastructure extensions could be undertaken alongside other local projects.
- If progressed, consider Light Industrial zoning with village-edge design expectations, including landscape integration, modest scale, safe access, low-impact uses and confirmation of servicing feasibility.
- Review the need and opportunity for industrial land in St Marys as part of periodic industrial land monitoring, future township planning, or when relevant funding programs become available.

Recommendation 5: Identify Fingal Outer West as a Strategic Industrial Investigation Area

Council should not progress immediate rezoning of the Fingal Outer West investigation area. Current demand in Fingal is limited and the scale of the site is well beyond foreseeable local-serving industrial needs. However, the site's combination of Esk Highway frontage, rail corridor adjacency, separation from residential areas and higher-capacity electricity infrastructure gives it strategic value if a larger or specialised industrial opportunity emerges.

The recommended approach is to identify Fingal Outer West as a Strategic Industrial Investigation Area in Council's economic development, infrastructure advocacy and regional planning work. This would preserve the strategic intent without creating unrealistic expectations of near-term development or over-zoning rural land without demonstrated demand.

Implementation actions:

- Recognise the area in Council strategic documents as a long-term opportunity for larger or specialised industry, rather than a near-term rezoning candidate.
- Advocate for appropriate recognition of the Fingal corridor in regional land use, freight, energy and infrastructure planning processes.
- Monitor potential anchor uses linked to resource recovery, bioenergy, agricultural processing, energy, rail freight, mining-related services or other large-footprint industrial activities.
- Avoid supporting land use or subdivision decisions that would materially compromise the area's long-term strategic industrial potential.
- Require any future proponent-led proposal to prepare a site-specific development framework addressing access, servicing, visual impact, environmental constraints, buffers and infrastructure requirements.

Recommendation 6: Prepare precinct design principles for future industrial land

Council should prepare concise industrial precinct design principles to guide future rezoning, subdivision and development of new or expanded industrial land. The objective is not to impose detailed architectural controls, but to ensure future industrial precincts are functional, well-serviced, safe, attractive and responsive to local conditions.

This is particularly important for small-scale industrial and creative / trade-based precincts. These areas need to support practical industrial activities, but they should avoid a compound-style appearance dominated by blank walls, unmanaged hardstand, outdoor storage, barbed wire and poor street presentation. Better upfront design can improve business appeal, community acceptance and long-term precinct performance.

The design principles should address:

- Site-responsive layout, including drainage, slope, vegetation, environmental constraints, scenic interfaces and nearby sensitive uses
- Access and movement, including road connections, heavy vehicle movement, internal circulation and avoiding industrial traffic through residential streets
- Landscape and interface treatment, including buffers to residential, rural, highway, rail and environmental edges
- Built form and public presentation, including clear entries, integrated signage, screened storage/loading areas, visually softened fencing and avoidance of large blank walls to streets or key public interfaces

Design expectations should vary by precinct role:

Precinct	Design expectation
St Helens Industrial Estate Expansion	Highest standard. Focus on high-quality street and highway presentation, residential interfaces, landscape buffers, small-format building design, fencing, stormwater and active frontages where practical.
Scamander	Moderate standard. General Industrial flexibility should be retained, but with clear expectations for buffers, environmental protection, staged access, screening, internal road layout and landscape presentation.
St Helens South	Moderate standard. Focus on low visual impact, screening, fencing, stormwater quality, wastewater constraints and environmental interface management.
St Marys	Moderate village-edge standard if progressed. Focus on modest scale, landscape integration, safe access and avoiding a hard industrial edge.

Fingal Outer West	No immediate statutory design controls required. Any future anchor-use proposal should include a site-specific development framework addressing access, buffers, visual impact, servicing and environmental constraints.
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Recommendation 7: Prepare precinct servicing and funding plans before land release

Council should avoid relying on rezoning alone to deliver industrial land. For priority precincts, rezoning should be accompanied by preliminary servicing investigations and a precinct servicing and funding plan. This is critical to ensuring land is genuinely development-ready rather than being zoned but stranded by unresolved trunk infrastructure, stormwater, access or service connection costs.

This approach is particularly important because the likely users of future industrial land in Break O'Day are small businesses, trades, storage operators and local enterprises. These users are unlikely to be able to absorb major trunk infrastructure costs on an individual site-by-site basis. Where possible, shared or precinct-scale infrastructure should be planned, funded and delivered upfront or through a coordinated delivery model.

Implementation actions:

- Prepare preliminary servicing investigations for St Helens and Scamander before or alongside any LPS amendment process.
- Identify trunk infrastructure requirements for roads, stormwater, water, sewer or wastewater, power, telecommunications and digital connectivity.
- Prepare a precinct servicing and funding plan that identifies likely infrastructure items, responsible agencies, sequencing, funding opportunities and delivery responsibilities.
- Pursue State and Federal funding for enabling infrastructure where industrial land delivery supports regional economic development, local employment, circular economy, energy resilience or small business growth.
- Consider Council-led headworks, staged subdivision, landowner contribution models, government land release arrangements or public-private partnerships where appropriate.
- Prioritise precinct-scale stormwater solutions, particularly in St Helens, to avoid repeating site-by-site drainage and flood management issues experienced in existing industrial areas.
- Engage early with TasWater, TasNetworks, State Growth, telecommunications providers and relevant landholders to confirm servicing pathways and agency requirements.

Recommendation 8: Improve the function and presentation of existing industrial land

New land supply should be supported by improvements to existing industrial areas, particularly the St Helens estate. The existing estate will remain the municipality's primary industrial precinct and should continue to accommodate a range of industrial, storage, service and manufacturing activities. However, its function and presentation are constrained by limited vacant land, stormwater issues, narrow roads, sensitive interfaces and dated built form.

Council should support practical improvements that increase the effectiveness of existing industrial land, while recognising that the fragmented ownership pattern may limit the pace of change.

Implementation actions:

- Investigate precinct-scale stormwater improvements in the existing St Helens industrial estate.
- Encourage redevelopment or intensification of underutilised lots where servicing, access and amenity impacts can be managed.
- Use future Light Industrial land supply to provide relocation options for lower-intensity storage and small trade uses where this improves the function of the existing General Industrial estate.
- Encourage better fencing, landscaping, signage and frontage presentation as sites are redeveloped or expanded.
- Monitor vacancy, business turnover, permit activity and land absorption to inform future staging decisions.

10.2 Implementation priorities

The implementation of future industrial land in Break O'Day should be guided by a priority and trigger-based framework, rather than fixed delivery years. This approach recognises that implementation will depend on Council resourcing, infrastructure funding, landholder agreement, agency input, technical investigations and demonstrated market demand.

However, the framework also recognises that not all sites are equal in their urgency or readiness. St Helens is already operating at functional capacity and has the strongest demonstrated need for additional industrial land. It should therefore be treated as an immediate planning priority. Other sites should be advanced progressively as demand, infrastructure readiness and delivery conditions are met.

Priority	Site / precinct	Recommended planning position	Key triggers	Next action
Priority 1: Immediate planning focus	St Helens Industrial Estate Expansion	Progress staged rezoning to Light Industrial Zone	Existing estate remains at functional capacity; limited vacant land; demand for small workshops, trades and storage; feasible servicing pathway confirmed	Commence amendment scoping, precinct structure planning and preliminary servicing investigations
Priority 2: Priority future investigation	Scamander Service and Industrial Precinct	Identify an initial 5 to 10 ha General Industrial Zone development envelope within the broader government-owned site	Government landholder support; alignment with Scamander-Beaumaris Structure Plan; servicing and environmental constraints resolved; demand for local service / industrial land strengthens	Begin agency discussions, define development envelope and undertake technical investigations
Priority 3: Conditional opportunity	St Helens South	Investigate as a low-activity Light Industrial / storage precinct, not a broad industrial estate	Specific demand for storage, yard-based or low-activity service uses; wastewater and stormwater quality issues can be managed; environmental constraints resolved	Retain as a conditional option and test further only if a defined use or delivery opportunity emerges
Priority 4: Demand-triggered local option	St Marys	Retain as a future Light Industrial Zone option for small local service uses	Local demand emerges; proponent interest; Council identifies need for local trades / storage land; servicing feasibility confirmed	Monitor demand and avoid rezoning until there is a clearer delivery pathway
Priority 5: Strategic monitor area	Fingal Outer West	Do not rezone now. Identify as a long-term strategic industrial investigation area	Major anchor industry, rail-related freight, energy, resource recovery, agricultural processing or circular economy proposal emerges	Include in Council's long-term industrial land register and regional advocacy, but take no statutory action now

APPENDIX A

Appendix 1: Planning and Policy Framework

Planning Policy	Policy Framework	Strategic Alignment
Tasmanian Planning Scheme	The Tasmanian Planning Scheme (TPS) outlines the requirements for use or development of land in accordance with the Land Use Planning and Approvals Act 1993. The TPS includes two parts: 1. The State Planning Provisions (SPPs); and 2. The Local Provisions Schedules (LPS). The TPS establishes consistent statewide land use rules through SPPs and LPS. ³	This study supports the TPS by informing potential amendments to the LPS to accommodate industrial land, ensuring consistency with statewide planning provisions.
Local Provision Schedule	The LPS applies the TPS to each municipal area and includes zone and overlay maps, local area objectives, code lists, particular purpose zones, specific area plans, and any site-specific qualifications. ⁴	This report will inform the LPS for Break O'Day, ensuring future industrial land is appropriately zoned and strategically located.
Northern Tasmania Regional Land Use Strategy	The Regional Land Use Strategy is the statutory regional plan for Northern Tasmania. The NTRLUS determines the strategy and policy basis to facilitate and manage change, growth and development to 2032. The NTRLUS also guides the regional land use and identifies industrial land as essential for economic development and land protection. ⁵	This report aligns with NTRLUS by identifying industrial land in a way that supports regional economic development, protects industrial land from conflicting uses, and considers infrastructure access.
Statewide Industrial Land Study 2025	The Statewide Industrial Land Study (SGS Economics and Planning, 2025) assesses industrial land supply and demand across all Tasmanian local government areas. It identifies locally significant industrial land directions for each council, including investigating light industrial rezoning at Scamander and Beaumaris, addressing flood constraints at Fingal, and maintaining local industrial capacity at St Helens while balancing residential interfaces.	This study responds directly to the Statewide Study's directions for Break O'Day, providing the local evidence base to progress place-specific industrial land planning across St Helens, Scamander and Beaumaris, St Marys and Fingal.
Tasmanian Advanced Manufacturing Action Plan 2024	The Tasmanian Advanced Manufacturing Action Plan provides a framework of actions that the Tasmanian Government will undertake to provide support to the state's advanced manufacturing sector to enable the industry to grow its capability and to become more successful and sustainable. ⁶	This project enables land use planning to support emerging manufacturing needs, ensuring the availability of land suitable for high-value industry and innovation.
Strategic Asset Management Plan 2020-2029	This Strategic Asset Management Plan takes the organisational objectives in our Strategic Plan, develops the asset management objectives, principles, framework and strategies required to achieve our	Ensures that future industrial land planning aligns with infrastructure capacity and

³ Planning Scheme Viewer

⁴ Planning Scheme Viewer

⁵ Northern Tasmania Regional Land Use Strategy

⁶ Final-Report-Advanced-Manufacturing-Action-Plan-2024.pdf

	organisational objectives. The Plan also guides efficient and sustainable management of public infrastructure and assets. ⁷	supports sustainable investment in local assets.
Community Infrastructure Design Guidelines 2013	The Community Infrastructure Design Guidelines establishes a manual for the selection and placement of urban infrastructure within the different townships of Break O'Day. ⁸	This study supports quality design and integration of industrial land into the broader community infrastructure network. Encourages compatible development.
Access and Inclusion Action Plan 2024-2026	The Access and Inclusion Action Plan is a strategic commitment by the Council to foster a more inclusive, accessible, and equitable community for people of all abilities. The plan recognises disability in its broadest sense and seeks to eliminate barriers that prevent participation in the community. ⁹	This study supports equitable access to industrial employment and services by considering inclusive infrastructure design and transport options in industrial land planning.
St Helens Township Plan 2022-2025	The St Helens Township Plan is used to guide development and land use decisions within the St Helens area to support local growth, amenities, and sustainable development. This plan highlights a strong community focus on improving infrastructure accessibility. ¹⁰	This study aligns with this plan as it focuses on aligning industrial land planning with local priorities for growth and economic development in St Helens, ensuring compatibility with surrounding land uses.
Fingal Township Plan 2022-2025	The Fingal Township Plan outlines a collaborative strategy between the local council and the community to help guide development and improvement efforts over a three-year period. The plan outlines the goals for the social, economic, and environmental development of Fingal, focusing on sustainable community growth. ¹¹	This study ensures that industrial land considerations are consistent with the Fingal development goals outlined in the plan, enhancing the local employment opportunities and infrastructure use.

⁷ [Strategic-Asset-Management-Plan-2020-2029.pdf](#)

⁸ [bodc.tas.gov.au/wp-content/uploads/2018/06/Final.BOD_MMP_Community-Infrastructure-May-2013-1.pdf](#)

⁹ [Access-and-Inclusion-Action-Plan-2024-2026.pdf](#)

¹⁰ [St-Helens-Township-Plan-V2.pdf](#)

¹¹ [Fingal-Township-Plan-V1.pdf](#)

APPENDIX B

Appendix 2: Labour force participation rates, Break O'Day

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
15-24 years	69%	56%	73%	69%	71%	67%	64%	63%	64%	60%
All ages	45.8%	45.9%	45.6%	46.6%	46.1%	46.2%	47.1%	47.4%	47.9%	46.3%

Source: REMPLAN Small Area Labour Force

*Note: This data is the total average across each quarter (Q1 March, Q2 June, Q3 September, Q4 December) for each year

Appendix 3: Employment by Industry 2011-2021

Industry	Jobs		10-year annual growth
	2011	2021	
Information Media and Telecommunications	10	11	1%
Financial and Insurance Services	15	15	0%
Rental, Hiring and Real Estate Services	33	19	-5%
Electricity, Gas, Water and Waste Services	17	22	3%
Arts and Recreation Services	15	24	5%
Wholesale Trade	29	27	-1%
Mining	63	41	-4%
Other Services	28	54	7%
Transport, Postal and Warehousing	89	62	-4%
Administrative and Support Services	25	65	10%
Professional, Scientific and Technical Services	37	69	6%
Manufacturing	107	95	-1%
Public Administration and Safety	111	98	-1%
Construction	84	146	6%
Education and Training	177	169	0%
Agriculture, Forestry and Fishing	183	203	1%
Retail Trade	231	249	1%
Accommodation and Food Services	208	254	2%
Health Care and Social Assistance	208	265	2%

Source: REMPLAN Community

Appendix 4: Top 15 industries ranked by number of business entries from 1 Jan 2020 to 31 Dec 2024

Rank	Industry	2020	2021	2022	2023	2024	Total
1	Construction Services	4	6	4	5	2	21
2	Accommodation & Food Services	1	6	6	5	1	19
3	Professional, Scientific & Technical Services	2	5	3	4	3	17
4	Retail Trade	3	3	4	2	4	16
5	Livestock, Grains & Other Agriculture	1	4	3	2	1	11
6	Health Care Services	5	0	3	0	1	9
7	Property Services	1	3	3	0	1	8
8	Construction	1	3	2	1	0	7
9	Agriculture, Forestry & Fishing Support Services	4	0	0	1	1	6
10	Administrative & Support Services	0	1	2	3	0	6
11	Residential Care & Social Assistance Services	1	3	0	1	0	5
12	Forestry, Fishing & Hunting	2	0	1	1	0	4
13	Postal & Courier Pick-up & Delivery Services	0	2	0	2	0	4
14	Food Product Manufacturing	0	0	0	1	2	3
15	Metal & Metal Product Manufacturing	0	1	1	0	1	3
16	Transport	0	1	1	1	0	3
17	Repair, Maintenance & Other Services	1	0	0	1	1	3
18	Personal	1	0	1	1	0	3

Source: ABR, February 2025 (compiled by REMPLAN). Includes only businesses registered for GST. Excludes certain non-trading entities.

Appendix 5: Location quotient for Break O'Day Industry Sectors

Industry	LQ 2021	Job Change 2016-2021	Jobs 2021	LQ 2016
Non-Metallic Mineral Product Manufacturing	6.087191554	-3.0%	36	8.296036552
Forestry, Fishing & Hunting	3.368299886	-8.7%	40	4.661821144
Aquaculture	2.317663318	3.4%	46	2.62425646
Beverage Product Manufacturing	2.264580191	22.4%	22	1.196242261
Technical Equipment & Appliance Manufacturing	2.253604843	17.1%	11	0.813182613
Agriculture, Forestry & Fishing Support Services	2.078958864	-2.2%	17	3.065666308
Mining	2.047261733	5.2%	36	1.954976306
Livestock, Grains & Other Agriculture	1.98196988	1.6%	134	2.008424465
Postal & Courier Pick-up & Delivery Service	1.878283059	-4.2%	29	2.986958573
Accommodation & Food Services	1.661129915	2.3%	262	1.679474919
Transport Equipment & Parts Manufacturing	1.546542569	19.1%	12	0.672886272

Source: REMPLAN Economy

Appendix 8: Employment forecasts, selected industrial sectors (Place of Usual Residence)

Industry	2021	2026	2031	2036	2041	2046
Construction	185	192	189	191	198	206

Manufacturing	114	100	98	98	101	104
Other Services	53	59	58	58	60	62
Transport, Postal & Warehousing	61	62	56	54	52	53
Wholesale Trade	25	23	22	22	22	22

Source: REMPLAN

APPENDIX C

A Multi-Criteria Analysis (MCA) was used as an initial screening tool to identify parcels with relative potential for future industrial or employment land investigation. The MCA was not used as a final site selection tool. It provided a structured way to compare a large number of parcels before applying planning judgement, Council officer review, township-specific considerations and the detailed site assessment framework.

The analysis was applied to cadastral parcels within the key Break O'Day localities considered relevant to the study, including St Helens, Scamander, St Marys, Stieglitz, Fingal, Beaumaris, Binalong Bay, Falmouth, Akaroa and Cornwall. Parcels were not excluded at the outset on the basis of current zoning or land use, as the purpose of the MCA was to identify relative physical, locational and infrastructure suitability before further filtering.

The MCA considered a range of factors relevant to industrial land suitability, including:

- parcel size
- proportion of land not affected by key mapped constraints
- slope and general landform
- proximity to sewer infrastructure
- proximity to water infrastructure
- proximity to the road network, including higher-order roads
- proximity to high-voltage electricity infrastructure.

Mapped constraints considered in the analysis included flood-prone land, indicative buffers to residential and other sensitive uses, and selected planning code overlays relating to natural assets, scenic protection and coastal hazards. Bushfire hazard was not used as a primary differentiating constraint because it applies broadly across much of the municipality and was therefore less useful for comparing relative suitability at this initial screening stage.

Each factor was standardised to a common 0 to 1 scale, where higher scores indicate more favourable conditions. Area-based measures considered the proportion of each parcel affected by constraints or suitable landform, while distance-based measures considered relative proximity to key infrastructure and access networks. The factors were then combined using a weighted scoring process, with stronger emphasis placed on landform, servicing proximity and access considerations.

The resulting MCA score should be interpreted as an indicator of relative opportunity, not a determination that a site is suitable or developable. Higher-scoring parcels generally had a stronger combination of size, flatter land, fewer mapped constraints and better

proximity to infrastructure. Lower-scoring parcels generally had greater constraints, smaller functional areas or weaker access to infrastructure.

For interpretation, MCA scores were grouped broadly as follows:

- High potential: generally above 0.70
- Moderate potential: generally between 0.50 and 0.70
- Low potential: generally between 0.30 and 0.50
- Unsuitable or low suitability: generally below 0.30.

These thresholds are indicative only. They were used to support initial screening and mapping review, not to make final planning recommendations.

Following the MCA, Council officer review was used to incorporate local operational knowledge, known site constraints and practical delivery considerations not fully captured in the spatial data. A further filtering process was then applied to consider settlement relationships, infrastructure feasibility, access, township roles, land use compatibility and likely demand. The remaining parcels were grouped into Strategic Investigation Areas and assessed through the site assessment framework in Section 9.

The MCA has several limitations. It relies on available spatial datasets and does not replace detailed technical investigations, landowner engagement, servicing assessments, environmental studies, traffic analysis or statutory planning processes. It also does not account for all market, ownership, funding or delivery issues. For these reasons, the MCA was treated as one input into the broader strategic assessment rather than as a standalone basis for rezoning or land release.