

Greater Dandenong Green Wedge Management Plan

Final Draft Technical Report: Land Use (Property Economics)

CITY OF GREATER DANDENONG

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INTRODUCTION

This report has been prepared by Urban Enterprise to inform the Greater Dandenong Green Wedge Management Plan (GWMP), undertaken by Planisphere for the City of Greater Dandenong (**Council**). The GWMP addresses and analyses the planning and management of existing land use and development in the Green Wedge study area. The GWMP will provide recommendations and directions for the future land use and development, as well as the long-term provision of relevant community and regional facilities in the Green Wedge.

As part of the project team led by Planisphere, Urban Enterprise has prepared a property and economic assessment for the Green Wedge study area. The assessment includes the following:

- An economic and demographic profile which outlines the key demographic trends affecting the current and future land use in the Green Wedge;
- A business analysis which identifies the businesses, key activities and activity types in the study area and defines the economic role of the Green Wedge;
- A detailed consultation program with major businesses and land users;
- Identify and assess any opportunities and constraints in respect to land use and development; and
- Provide future directions to achieve improved land use and economic outcomes.

The following sections provide background information, data and analysis which have been provided to inform the Greater Dandenong Green Wedge Management Plan.

1. POLICY AND STATUTORY CONTEXT

1.1. INTRODUCTION

This section provides a review of the policy context, planning zones and overlays in the Greater Dandenong Green Wedge. The review will provide the purpose of each zone, and an overview of the permitted and prohibited uses that are relevant to the Green Wedge in each planning zone. The review will also provide a summary of the key purposes and uses of each planning overlay in the Green Wedge. The zoning map is shown in Figure 1.

1.2. EXISTING LOCAL POLICY

The Local Planning Policy Framework of the Greater Dandenong Planning Scheme includes a Green Wedge Local Planning Policy at Clause 22.02. The policy establishes precincts in the Green Wedge area and applies particular development opportunities and requirements which respond to each precinct's character and function. There are four precincts as summarised below.

WETLANDS PRECINCT

The Wetlands Precinct is located adjacent to the existing urban area on Hutton Road. The land is generally characterised by an open rural landscape that has been maintained by the existing land use and subdivision pattern with a number of large landholdings. The precinct forms an important transition from the urban area to the north (where urban conversion is likely to occur) to the balance of the non-urban area to the south and east (where rural land use is dominant).

The future vision for the precinct is to retain the open rural landscape character. Council will pursue the opportunity to create a system of linear open space tails, wetlands and linkages utilising drainage lines. Any change of land use and associated development will contribute to and be subservient to the 'Green Vision' concept.

BANGHOLME LOWLAND PRECINCT

This precinct comprises just under half of the triangle of land bounded by the Mordialloc and Dandenong Creeks, the Mornington Peninsula Freeway and, for a short length, Springvale

Road. Lots vary in size from between 2 - 4 hectares towards Springvale Road and between 20 - 25 hectares on the eastern side of the precinct.

The land is primarily used for open grazing, hobby farms and some small institutional uses such as a dog obedience club. There are little or no intensive agricultural activities in this precinct. Road access to and within the precinct is limited and the area is remote from community facilities.

The future vision for the precinct reinforces the differentiation between urban and non-urban land use within the green wedge. The notion of developing hamlets, a small suburb, or similar increased residential clustering is discouraged in this precinct. This area will retain an open rural landscape character with a diverse mix of low density and other non-residential activities which do not require intensive development.

The majority of the land has already been subdivided below the current zoning provisions. A range of alternative agricultural activities may be assisted by access to recycled water from the Eastern Treatment Plant (ETP).

BUFFERS PRECINCT

This precinct has an area of 23.5 square kilometres and forms the core of the non-urban area in Greater Dandenong. The Eastlink Freeway reservation runs north-south through the centre of the precinct. The western sector is characterised by rural lots around 20 ha in area, but includes a 22 lot rural-residential subdivision with lots averaging 2.5 hectares in size. The central sector is occupied by the Eastern Treatment Plant. The eastern sector includes broad acre farming along with two caravan parks and a cemetery. There is also an area of intensive agriculture east of Frankston-Dandenong Road.

The precinct is based on a 1500 metre buffer around the Industrial 2 zone and the existing Environmental Significance Overlay around the Eastern Treatment Plant (ETP).

The future vision for the precinct states that the precinct has limited development potential due to its function in protecting the State significant resources of the Eastern Treatment Plant (ETP) and the Dandenong South Industrial Precinct. The existing subdivision pattern will be maintained and small lot subdivision will be particularly discouraged.

New uses will be supported that are consistent with Council's "Green Space" vision and can demonstrate that the use of land will not compromise the operation of the significant resources the buffers are designed to protect.

LYNDHURST PRECINCT

This precinct comprises large lots up to 40 hectares and is generally used as grazing land. The precinct is bounded to the east and west by important north-south arterial roads, the Frankston-Dandenong Road and the Western Port Highway. These roads provide some of the more visible and accessible parts of the non-urban area and provide important entry points to the wider South-East Non-Urban Area. High visibility and good accessibility have also caused significant pressure for commercial activities along these routes.

The vision for the precinct includes retaining the open rural landscape character and retaining broad scale farming activities. New opportunities may exist for the development of low density tourism, recreational, educational, institutional, cultural and other land intensive activities, which enhance the "Green Space" vision.

1.3. ZONES

The majority of land in the Greater Dandenong Green Wedge is within the Green Wedge Zone (65%), with the remainder of land split between the Public Use Zone, Urban Floodway Zone, Special Use Zone and Public Park and Recreation Zone.

The intent and controls of each zone are summarised in the following sections.

GREEN WEDGE ZONE (GWZ)

Approximately 65% of the study area is zoned Green Wedge Zone (approximately 2,431ha).

The Green Wedge Zone provides opportunity for most agricultural uses and limits non-rural uses to those that either support agriculture or tourism, or that are essential for urban development but cannot locate in urban areas for amenity and other reasons (such as treatment plants and landfills).

The purpose of the zone is:

- To recognise, protect and conserve green wedge land for its agricultural, environmental, historic, landscape, recreational and tourism opportunities, and mineral and stone resources;

- To encourage sustainable farming activities and provide opportunity for a variety of productive agricultural uses;
- To protect, conserve and enhance the cultural heritage significance and the character of open rural and scenic non-urban landscapes;
- To protect and enhance the biodiversity of the area.

The Schedule to the Green Wedge Zone specifies a minimum subdivision area of 40ha, except for all land north of Mordialloc Creek and south of Hutton Road which has a minimum lot size of 6ha, and all land north of Hutton Road which has a minimum lot size of 4ha (this applies to the northern portion of the study site around Clarke Road).

CHANGES TO THE GREEN WEDGE ZONE

As part of the State Government zones review and reform process, a number of changes will be made to the Green Wedge Zone as of 5 September 2013. These changes include:

- Including a new purpose statement to provide for the use of land for agriculture;
- Making many agricultural uses exempt from a permit requirement;
- Removing the prohibition on primary and secondary schools and including additional decision guidelines for schools;
- Removing the prohibition on place of assembly and including an associated condition;
- Removing the requirement for a mandatory section 173 agreement which restricts future subdivision after an initial subdivision is approved; and
- Increasing the threshold for persons that can be accommodated in a bed and breakfast from six to 10 without a permit.

The proposed changes do not represent a major policy or land use shift in the Green Wedge, but will potentially facilitate greater investment and a greater variety of land uses such as agricultural business and new uses such as schools. The implications of these changes are discussed in Section 8.

PUBLIC USE ZONE (PUZ)

Land in the Green Wedge contains two Public Use Zones:

- PUZ1 - Service and Utility: applies to the Eastern Treatment Plant
- PUZ5 - Cemetery/Crematorium: applies to two cemeteries

The purpose of the zone is to recognise public land use for public utility and community services and facilities. Planning approval is not required for upgrades or development which is for the specified use of the zone. Some upgrades to the ETP will have to go through an EPA Works Approval process.

URBAN FLOODWAY ZONE (UFZ)

The UFZ applies to the Patterson River, Mordialloc Creek and Eumemmerring Creek.

The purpose of the zone is to identify waterways within urban areas which have the greatest risk and frequency of being affected by flooding, and to protect water quality and waterways as natural recourses.

SPECIAL USE ZONE (SUZ)

The SUZ2 applies to a small portion of land in the northern section of the study area around Clarke Road, adjoining the Spring Valley Reserve. The land is part of the buffer zone of the former Clarke Road landfill and covers approximately 4.2ha. The purpose of the zone is to provide interim use of the land compatible with the use and development of nearby land.

PUBLIC PARK AND RECREATION ZONE (PPRZ)

The PPRZ applies to the majority of the land in the northern portion of the study site known as Spring Valley Reserve.

1.4. OVERLAYS

There are a number of overlays which apply to sections of the study area. No overlays apply to the northern portion of the site (Clarke Road site).

ENVIRONMENTAL SIGNIFICANCE OVERLAY (ESO)

ESO3 applies to the majority of land around the Eastern Treatment Plant (ETP). The purpose of the overlay is to ensure that the use and development of land around the ETP is compatible with the plant's operations and to regulate the establishment and siting of odour sensitive uses so that the impact of any odour from the ETP can be minimised.

Recent Environmental Protection Authority (EPA) guidelines on separation distances are outlined in the following section.

LAND SUBJECT TO INNUNDATION OVERLAY (LSIO)

The LSIO applies to the Patterson River, Mordialloc Creek and Eumemmerring Creek. The purpose of the overlay is to identify land in a flood storage or flood fringe area, to ensure that development maintains the free passage and temporary storage of floodwaters, to minimise flood damage, to protect water quality and to ensure that development maintains or improves river and wetland health, waterway protection and flood plain health.

HERITAGE OVERLAY (HO)

The purpose of the HO is to conserve and enhance heritage places of natural or cultural significance, and to ensure that development does not adversely affect the significance of heritage places. A permit is required to subdivide land, demolish or remove a building, and to construct or carry out works.

The HO applies to four sites within the study site including:

- HO8: Holmwood Farm Complex and trees
- HO22: Glen Alvie Homestead
- HO23: Eversleigh Homestead
- HO76: Sime Farmhouse

PUBLIC ACQUISITION OVERLAY (PAO)

The purpose of the PAO is to identify land which is proposed to be acquired by an authority, and to reserve land for public purpose. The overlay applies to three areas in the study area including:

- PAO1: Proposed road widening
- PAO3: Southern and Eastern Integrated Transport Project
- PAO6: Drainage purposes

1.5. EPA SEPARATION DISTANCES

In March 2013, the EPA released a guideline relating to *Recommended Separation distances for industrial residual air emissions (1518)*.

The guideline “contains a list of recommended minimum separation distances that aims to minimise the off-site impacts on sensitive land uses arising from unintended, industry-generated odour and dust emissions”.

The guideline includes an index of industry categories for which certain separation distances are recommended. Uses identified in the index which currently operate within the Green Wedge have separation distances which are not explicitly prescribed in the guideline but are to be calculated with reference to other guidelines, as follows:

- Poultry - Egg production - separation distance required under the Environmental Guidelines for the Australian Egg Industry;
- Sewerage Treatment Plant - to be determined in consultation with EPA depending on the type of facility and other factors such as wind regimes, topography, waste loading and disposal methods (we understand that this exercise is currently being undertaken by the EPA and Melbourne Water).

Table 1 identifies examples of land uses that can be located within separation distances as outlined in the guideline. The guideline notes that this list is not exhaustive. Melbourne Water has provided the types of uses that are generally compatible and incompatible with the ETP - see Section 7.5 for more detail.

TABLE 1 INTERFACE LAND USES

Suitability	Examples of interface land use
To be encouraged	Agriculture, car parks, cinema based entertainment, emergency services, natural systems, offices, research centres, service stations and veterinary clinics.
To be considered (subject to assessment)	Light industry with no adverse amenity potential and utilities (except for sewerage works)
To be prevented	Sensitive Land Uses and industrial land uses that require separation distances as listed in the index.

Source: EPA Guideline 1518 (2013)

1.6. DANDENONG SOUTH INDUSTRIAL EXTENSION STRUCTURE PLAN

In 2007 the Dandenong South Industrial Cluster was extended to two areas in Keysborough and Lyndhurst, on land adjacent to the Green Wedge. The structure plan was incorporated into the Greater Dandenong Planning Scheme in January 2007. The plan points out that the Greater Dandenong economy is an extensive employer and ranked third out of all LGAs in Metropolitan Melbourne in terms of the number of jobs offered. It is the largest provider of manufacturing jobs out of all metropolitan Melbourne LGAs. Manufacturing activity in the local region includes that related to agriculture, textiles clothing and footwear, metal product and machinery and equipment manufacturing. However, the Greater Dandenong region has not been a dominant player in high-value, niche market manufacturing (e.g. scientific equipment, industrial machinery etc.).

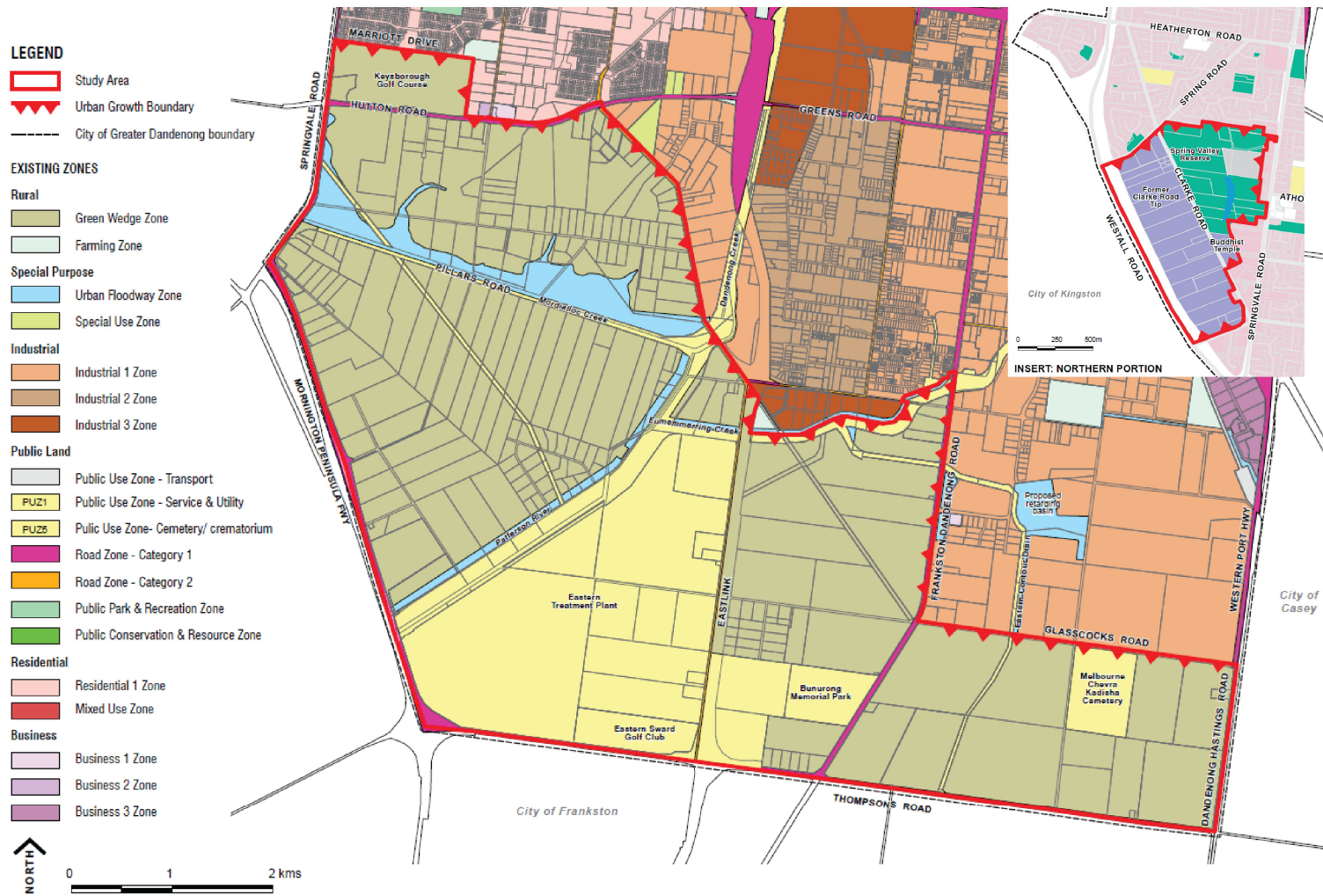
The structure plan vision is for a future cluster for which is a “new economy” in manufacturing, wholesaling, transport and storage business. The plan estimates that around 400 to 825 hectares of industrial land will be required in Greater Dandenong over the next ten years. This estimate was provided before the establishment of the Eastlink Freeway which would further increase demand for industrial land. This land is now included in the Industrial 1 Zone (IN1Z).

1.7. UGB ANOMALIES ADVISORY COMMITTEE

In 2011 The Minister for Planning appointed the Urban Growth Boundary Anomalies Advisory Committee (the Committee) to provide advice on the suitability of including sites identified by non-growth area Councils as significant anomalies to the Urban Growth Boundary (UGB). The committee recommended that four sites within the study area be included in the UGB applying the Residential 1 Zone.: These sites are 81-143, 159-171 and 173-191 Clarke Road, Springvale South and 462 Springvale Road, Springvale South.

In addition the Committee considered a 337ha site within the Green Wedge Zone defined as the 'Bangholme Precinct', bounded by Eumemmerring Creek, Frankston Dandenong Road, Harwood Road and EastLink. The committee resolved to not include the Bangholme Precinct within the UGB as it did not constitute a 'planning anomaly', but instead would represent a major policy change which was beyond the scope of the committee. The committee recommended that the possibility of an urban future for the area should be further investigated via the Council's Green Wedge Review.

FIGURE 1 ZONING



Source: Planisphere (2013)

2. LAND USE AND ECONOMY

2.1. INTRODUCTION

This section provides a summary of the businesses and key activities located within the Greater Dandenong Green Wedge, including major land users such as Eastern Treatment Plant (ETP), agriculture, residential and tourist accommodation, school, recreation and religious facilities.

A number of major private businesses and public operations are located within the Green Wedge, generating employment and economic output. These businesses are generally those which would not be located within the City of Greater Dandenong, were it not for the land use zones and buffers to residential areas and other sensitive uses that are available through the Green Wedge planning controls.

Results of consultation with selected major businesses are outlined in Section 5.

2.2. EASTERN TREATMENT PLANT

The ETP is one of two major plants which treat Melbourne's wastewater operated by Melbourne Water. It was opened in 1975 to serve Melbourne's growing population in the east and to support the Western Treatment Plant. It currently treats sewage from 1.5-1.6 million people in south east Melbourne, (42% of the metropolitan population), or approximately 350 million litres per day. Its catchment area stretches from Frankston to Greensborough, as shown in the Figure 2. The Western Treatment Plant in Werribee is the other major plant, treating approximately 50% of Melbourne's waste water.¹

FIGURE 2 EASTERN TREATMENT PLANT CATCHMENT AREA



Source: Melbourne Water (2013)

The plant is approximately 1,100ha (30% of Green Wedge area) in size and is located within the 'Buffers Precinct' on the corner of Thompsons Road and the Eastlink Freeway. Use of the surrounding land is subject to compliance with ESO3 which covers a further 1,920ha (51% of Green Wedge area). The plant utilises mechanical and biological processes to treat water to a Class A standard which is distributed through a recycled water network and is suitable for a

¹ Melbourne Water, <http://www.melbournewater.com.au/content/sewage>

range of uses such as toilet flushing, agriculture, and sports fields. Other effluent produced by the process is disposed through the Gunnamatta outfall.

The plant is of regional and state significance and there is a need for the facility to be protected from inappropriate uses nearby. Future operational requirements should be factored into the future of the Green Wedge, particularly the buffer distances required under the EPA Guideline 1518 discussed in Section 5.

2.3. EASTLINK

The Eastlink Freeway was constructed in 2008 and connects Melbourne's eastern and south-eastern suburbs. It is a major commuter road and key intracity arterial route. The freeway traverses the study area on a 3.5 km stretch from Bangholme Road to Thompsons Road, effectively dissecting the area.

2.4. AGRICULTURE

Agricultural land is dispersed throughout the Green Wedge. Most sites are too small to accommodate large commercial farming; however hobby farming activities, market gardens, grazing and some specialist production exist. A technical report specific to agriculture was also prepared to inform the Green Wedge Management Plan.

The South East Green Wedge Issues Paper points out that there is a diversity of opinion regarding the value of Green Wedge land for agriculture. Agriculture close to urban areas is often subject to land use conflict and there is difficulty in accumulating and expanding land holdings especially where land speculation and subdivision is high. This is true in the north-west of the study site where there has been greater residential pressure, however to the south east, within the 'Lyndhurst Precinct', a minimum subdivision area of 40ha has preserved large lot sizes which can be enough to accommodate intensive agricultural activities. Another constraint to expanding agriculture is that the Green Wedge Zone is more restrictive than the generic Farming Zone provisions and there is difficulty in establishing the larger facilities needed for commercial farming.

Some of the major agricultural landholders include:

LOWE FARMS (120 GLASSCOCKS RD)

Lowe Farms operates the most intensive agricultural activities in the green wedge producing a variety of salad vegetables. It currently operates on approximately 160ha of land. Historical

aerial photography indicates that the farm has undergone substantial expansion in recent years.

TAMARIX POULTRY FARM (383-404 FRANKSTON-DANDENONG RD)

The Tamarix Poultry Farm is an egg supplier which has been operating since 1961. It is located on a 4.5ha site which includes a shop front and café. Planning permit data indicates that these features have been added recently. The farm produces 60,000 eggs daily.

VAN WYK FLOWERS (605 THOMPSONS RD)

Van Wyk Flowers operates as a grower, wholesaler and florist. They operate on approximately 42ha of land which includes a shop front.

JAKUPI FLOWERS (576 FRANKSTON-DANDENONG RD)

Jakupi Flowers operates a flower growing business including retail sales and distribution.

2.5. RESIDENTIAL AND TOURIST ACCOMODATION

Demand for residential dwellings appears to be high in the broader area as a number of new residential estates have been established on the periphery of the Green Wedge in recent years. A number of small areas of residential subdivision have also occurred within the Green Wedge including around Keys Road, McMahrens Road, and Thompsons Road near the Eastlink off ramp. The subdivisions provide for large dwellings with a rural setting, and there are a number of vacant lots that may be developed in the future.

In addition there are a number of temporary accommodation providers:

WILLOW LODGE MOBILE HOME VILLAGE (2 WILLOWS RD)

Willow Lodge is a retirement village that began as a caravan park over 30 years ago. It has developed into a retirement/residential village with 409 permanent sites and approximately 600 residents.

According to the Urban Growth Boundary Anomalies Advisory Committee (2012) the site has a "vexed" planning history, however is now an entrenched use that needs to be recognised and accommodated for in future planning for the Green Wedge. The mobile home also includes a medical office, café and a number of small businesses which service the residents (convenience store, hairdresser).

BIG 4 TOURIST PARK (370 FRANKSTON-DANDENONG RD)

The Big 4 Tourist Park is located on approximately 1.5ha of land, along Eumemmerring Creek, south of the South Dandenong Industrial 2 Zone. It provides for a number of visitor accommodation types including caravan, camp sites, and cabins.

2.6. EDUCATION AND COMMUNITY FACILITIES

There are a number of educational, cultural and religious organisations based in the Green Wedge. They include:

CORNISH COLLEGE (65 RIVEREND RD)

Cornish College was established in 1987 by a previous operator (St Leonards College) in the southern portion of the Green Wedge, within the ETP Buffer area. The private college incorporates an early learning centre, primary school and secondary school.

The recent changes to the Green Wedge Zone remove the prohibition on primary and secondary schools locating in the Green Wedge and may allow for the expansion of the school.

SIKH TEMPLE (198-206 PERRY RD)

The Sikh Temple is located on land approximately 2ha in size. Building permit data indicates that the temple was constructed in 2012.

KHMER BUDDHIST TEMPLE (159-171 CLARKE RD)

The Khmer Buddhist Temple is located in the northern portion of the study area along Clarke Road and is zoned part Residential 1 Zone and part Green Wedge Zone. The site has an approximate area of 1ha.

In 2012 the Urban Growth Boundary Anomalies Committee recommended that the site be included within the UGB applying the Residential 1 Zone.

In addition, the land has been identified by the EPA as being within a 500m buffer zone of two former landfill sites. The City of Greater Dandenong has acknowledged that it has an obligation to ensure that all future development applications "*are assessed according to the environmental conditions of the sites*".

Other religious organisations located within the Green Wedge include the Christian Church on Soden Road, and the Samoan Seventh Day Adventist Church on Thompsons Road.

2.7. RECREATION AND SPORTING FACILITIES

There are a number of recreational facilities and sporting clubs. They are all located to the west of the Eastlink Tollway. They include:

- National Water Sports Centre (Riverend Rd) - the National Water Sports Centre was developed as an international standard rowing course in preparation for Melbourne's bid for the 1988 Olympic Games. The facility currently hosts a range of water sports. It is located on the south west corner of the study area on approximately 2ha.
- Gaelic Park and Sports Complex (324 Perry Rd) - the Gaelic Sports Complex includes four sporting fields and a large clubhouse which is used for a variety of functions (e.g. balls, concerts etc.).
- Keysborough Golf Club (55 Hutton Rd) - an eighteen hole golf course located in the northern part of the study site which spans approximately 80ha.
- Eastern Sward Golf Club (Cnr Thompson and Worsley Rd) - a nine hole golf course located next to the Eastern Treatment Plant on land leased from Melbourne Water.

2.8. ANIMAL BOARDING FACILITIES

There are a number of equestrian centres located along Pillars Road, as well as a large racecourse:

RIVEREND PARK RACECOURSE (128 RIVEREND RD)

The Riverend Park Racecourse is a thoroughbred training facility with an area of approximately 50ha. Real estate records indicate that the property was sold in 2011 for an estimated \$8m.²

² <http://www.realestate.com.au/property-other-vic-bangholme-7314795>

WILLOW LANE EQUESTRIAN CENTRE (280-296 PILLARS RD)

The equestrian centre includes a large indoor arena, outdoor arena, show jumping area, and cross-country course over an area of approximately 40ha.

BLINKBONNIE EQUESTRIAN CENTRE (88 PILLARS RD)

The Blinkbonnie Equestrian Centre established in 1999 as a horse riding school which includes a large arena, show jumping and cross country course with an area of approximately 6ha.

SILVERDENE STUD (THOMPSON RD)

Silverdene Stud is an agistment facility which includes an indoor and outdoor arena. It is located in the south east corner of the study site on approximately 25ha.

SOUTHERN OBEDIENCE DOG CLUB (56 SODEN RD)

The dog obedience club operates on a 2ha complex including fenced training areas and clubrooms.

2.9. CEMETERIES

There are two cemeteries within the Green Wedge:

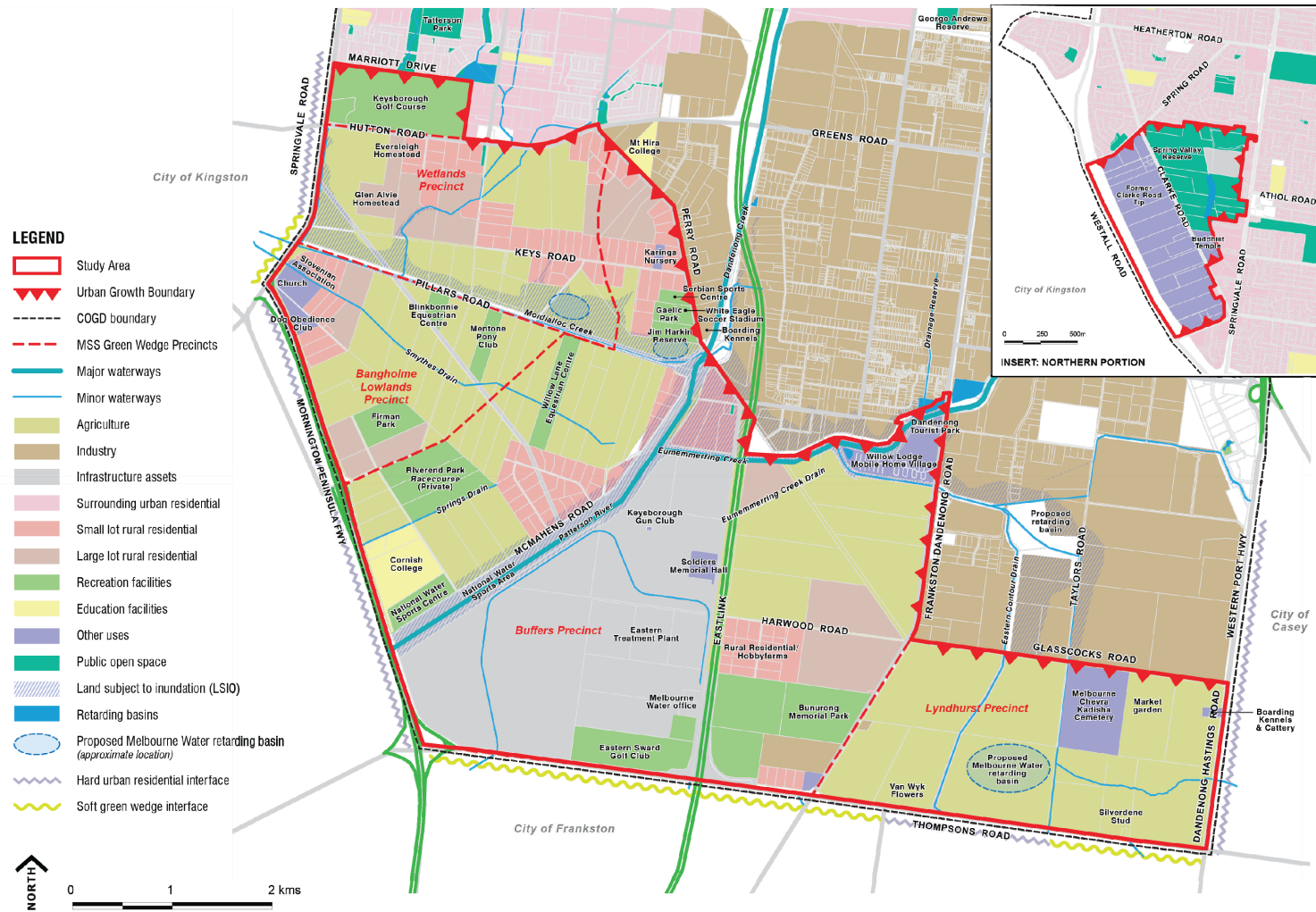
BUNURONG MEMORIAL PARK (790 FRANKSTON-DANDENONG RD)

The cemetery was established in 1995 and spans 120ha.

CHEVRA KADISHA CEMETERY (200 GLASSCOCKS RD)

A recently established Jewish cemetery spanning approximately 50ha.

FIGURE 3 GREATER DANDENONG GREEN WEDGE LAND USE



Source: Planisphere (2013)

2.10. ECONOMIC CONTEXT

This section analyses key economic data for the Green Wedge and surrounding suburbs and outlines the key economic and business trends affecting current and future land use in the Green Wedge.

2.10.1. ECONOMIC TRENDS

This section provides data and analysis of the types of businesses and economic trends in the broader local area (including areas outside the Green Wedge) in order to understand the economic context of the area and identify economic influences that may impact on the future land use pressures and demand within and adjacent to the Green Wedge study area.

To understand the economic strengths and industry specialisations for Greater Dandenong, relative employment comparisons can be made using the Location Quotient (LQ) technique. The LQ measures the proportion of employment in a particular industry relative to proportions in another region.

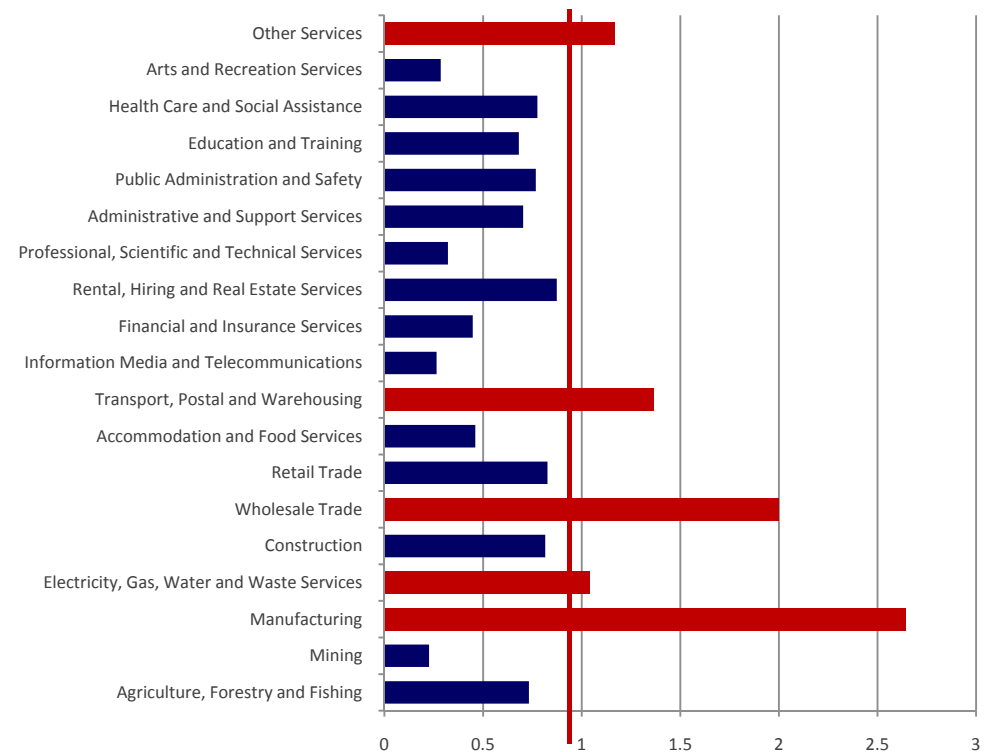
The following LQ analysis compared Greater Dandenong (LGA) with Greater Melbourne. An industry value of less than 1 indicates a low proportion of employment within that industry in Greater Dandenong compared Melbourne. A value greater than 1 represents a higher proportion of employment in Greater Dandenong and opportunities may exist for additional growth or the exporting of related industries due to the presence of an existing skilled labour pool and other resources.

The LQ analysis shows that the relative strengths of Greater Dandenong lie in 'Manufacturing', 'Wholesale Trade', 'Electricity, Gas, Water, and Waste Services', and 'Transport, Postal and Warehousing'. In general, Greater Dandenong supports higher proportions of land-intensive industries which would usually locate in industrial areas, and smaller amounts of professional and financial services.

The 'Manufacturing' sector in Greater Dandenong is particularly strong and is important to the wider State economy. Local and regional modelling presented in the State Parliamentary Inquiry into Manufacturing (2009) demonstrates that every 100 direct manufacturing jobs has a multiplier effect of a further 120 jobs with approximately half of these driving an industrial effect across other manufacturing, wholesale and retail trade, transport and storage and property and business services.

Although Manufacturing in Australia is experiencing challenges from broader macro-economic shifts, demand for industrial land in Greater Dandenong to support land-intensive industries is expected to continue, driven in part by proximity to Eastlink and the recently constructed Peninsula Link. This is demonstrated by a number industrial land rezonings in the City of Greater Dandenong in recent years.

FIGURE 4 LOCATION QUOTIENT FOR GREATER DANDENONG 2011



Source: ABS Census (2011)

2.11. LAND USE AND ECONOMY KEY FINDINGS

The Green Wedge contains a significant amount of vacant land, with a variety of economic and business uses dispersed throughout the study area in an un-coordinated manner.

The land use surrounding the Green Wedge is dominated by the Dandenong South Industrial Precinct which is expected to continue to expand in the future, mainly due to the proximity to Eastlink and the newly constructed Peninsula Link.

Major land use and economic activities within the Green Wedge include:

- The Eastern Treatment Plant which is of regional and State significance, being one of two such major facilities in Melbourne. The Green Wedge Management Plan should take into consideration the need to facilitate the ongoing operation of the Plant, the significant economic role of the facility and the need to protect buffer distances and associated amenity impacts.
- Agricultural production in the Green Wedge is mostly limited to small hobby farms and market gardens generally due to the small size of lots, fragmented land ownership pattern and land held for investment purposes. The most intensive agricultural activity is occurring in the Lyndhurst Precinct where lot sizes are larger in number and agricultural producers have developed larger scale businesses.
- Residential land use is predominantly located to the west of the Buffers Precinct, especially north of Pillars Road where there are a number of small rural residential lots (2ha in size). A number of new dwellings have been constructed in that area in recent years and there are a number of vacant lots which may be held for investment/speculation purposes in anticipation of future conversion to an urban zone.
- There are a number of animal boarding facilities, especially for horse training. This usage is consistent with Green Wedge objectives of promoting agriculture and a semi-rural landscape and therefore provides an opportunity for further encouragement and expansion.

Green Wedge economic activity consists of a variety of un-coordinated uses, however much of this activity would be unlikely to be possible in urban areas of the municipality due to the proximity of sensitive uses and land availability/cost constraints. The major activities of the Eastern Treatment Plant, Cornish College, cemeteries, places of worship and significant agri-businesses are the corner-stones of the Green Wedge economy. These uses drive the

economic role of the Green Wedge, which can be summarised as providing opportunities for large scale agri-business, public utility and institutional, recreational and community uses, often with adverse amenity impacts, large land requirements and significant buffer distances.

3. PROPERTY AND DEVELOPMENT

3.1. INTRODUCTION

This section provides an overview of property and development indicators and pressures on the Green Wedge. Planning and building permit activity provides an understanding of the development trends within the Green Wedge, and property values are analysed to build an understanding of the development pressures in surrounding suburbs.

3.2. PLANNING AND BUILDING APPROVALS

Planning and Building approval data from 2009 to May 2013 was provided by the City of Greater Dandenong. There have been 65 planning permits (including 7 dwellings) approved within the Green Wedge since 2009.

Planning permits issued were predominately for general works and extensions, not new buildings.

5 of the 6 dwellings approved for building permits were within the Green Wedge Zone (GWZ) and located in the northern section between Pillar and Hutton Road in the Wetlands Precinct.

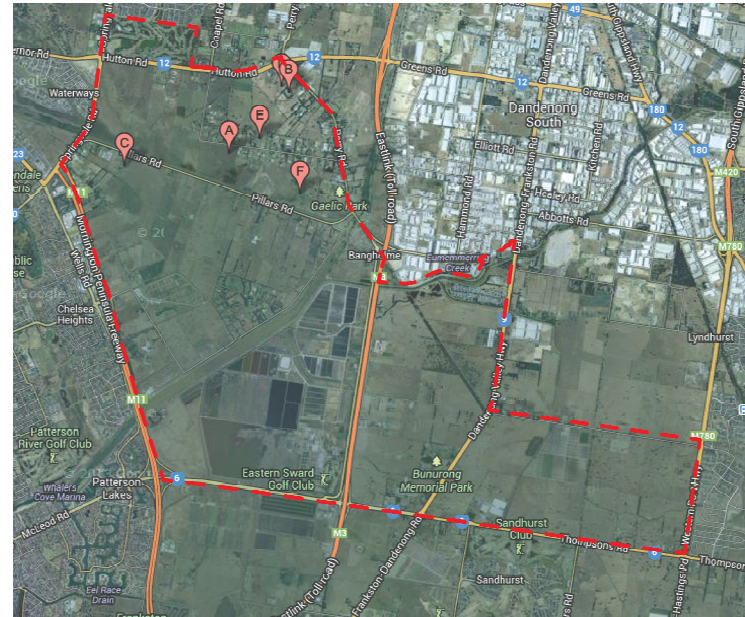
It is noted that only one permit was granted for subdivision of any kind in the Green Wedge.

TABLE 2 BUILDING PERMIT DWELLING APPROVALS 2009-2013

New Dwelling	Year	Zone	Address
A	2009	GWZ	Keys Road KEYSBOROUGH VIC 3173
B	2009	GWZ	Perry Road KEYSBOROUGH VIC 3173
C	2010	GWZ	Pillars Road BANGHOLME VIC 3175
D	2010	GWZ	Perry Road KEYSBOROUGH VIC 3173
E	2011	GWZ	Keys Road KEYSBOROUGH VIC 3173
F	2012	GWZ, UFZ	Keys Road KEYSBOROUGH VIC 3173

Source: City of Greater Dandenong (2013)

FIGURE 5 LOCATION OF BUILDING PERMIT DWELLING APPROVALS 2009-2013



Source: Urban Enterprise (2013), Batch Geo (2013)

TABLE 3 GREEN WEDGE PLANNING APPROVALS, 2009 – 2013

Permit Type	GWZ	GWZ & UFZ	PUZ1	Total
New Dwellings	7	-	-	7
Place of Worship	2	-	-	2
Extension/General Works	17	18	-	35
Earthworks	2	2	-	4
Modification to Access Road	-	-	2	2
Signage	4	-	-	4
Telecommunications	2	-	-	2
Solid Fuel Depot	1	-	-	1
Vegetation	-	2	2	4
Subdivision	-	1	-	1
Liquor	1	-	1	2
Land Fill	1	-	-	1
Total	37	23	5	65

Source: City of Greater Dandenong (2013)

3.3. PROPERTY MARKET

Median property values were obtained from the DSE Guide to Property Values 2011 which is based on property sales. Median property values were analysed including the suburbs surrounding the Green Wedge (Keysborough, Carrum Downs, Chelsea Heights, and Lyndhurst) and comparing price trends to the City of Greater Dandenong (LGA) and Metropolitan Melbourne.

3.4. HOUSE PRICE

In 2011 the median house price in the City of Greater Dandenong (\$415,000) was lower than Metropolitan Melbourne (\$490,000). However over the decade prior, median house prices grew at a rate of 11% per annum, higher than Metropolitan Melbourne (8%).

The median house value in 2011 in Carrum Downs (located to the south of the study area) is significantly lower than the other surrounding suburbs such as Keysborough (to the north of the site), Chelsea Heights (to the west) and Lyndhurst (to the east). All suburbs analysed experienced annual median price growth equivalent to or higher than the metropolitan average, underlining the pressure for urban development in the broader area.

The northern sections of the Green Wedge are located close to Keysborough, which is an established residential suburb with urban development continuing in a southerly direction towards the study area. It is expected that this will generate significant interest in the northern sections of the study area from residential buyers and developers and that this pressure for urban uses will increase in coming years.

FIGURE 6 MEDIAN HOUSE PRICE 2001–2011 (\$)

	Keysborough	Carrum Downs	Chelsea Heights	Lyndhurst	City of Greater Dandenong	Metro Melbourne
2001	165,100	149,000	187,300	- *	152,000	225,000
2002	191,500	179,000	239,000	225,000	185,000	260,000
2003	229,000	210,000	278,000	305,000	223,000	294,100
2004	249,000	225,000	299,500	299,000	240,000	310,000
2005	262,000	230,000	307,000	360,000	249,000	320,000
2006	276,000	241,000	305,500	321,500	262,000	347,000
2007	300,000	257,000	357,500	329,000	290,000	375,000
2008	360,000	275,000	385,000	338,000	335,000	390,000
2009	375,000	297,000	405,500	357,000	360,000	420,000
2010	417,000	333,000	445,000	435,000	425,000	495,000
2011	430,000	345,000	454,000	441,500	415,600	490,000
% Growth p.a	10%	9%	9%	8%	11%	8%

No Data for 2001 is available

Source: DSE Guide to Property Values (2011)

3.5. UNIT/APARTMENT PRICE

In 2011 the median unit/apartment price in the City of Greater Dandenong was significantly lower than Metropolitan Melbourne; however the municipality experienced a growth rate of 9% over the past decade, much higher than Metropolitan Melbourne (6%).

Similar to the median house price, the areas to the north and west of the Green Wedge experienced high rates of growth in unit/apartment prices with Keysborough and Chelsea Heights growing at a rate 9% per annum.

Note: no data for this property type is available for the suburb of Lyndhurst.

FIGURE 7 MEDIAN UNIT/APARTMENT PRICE 2001–2011 (\$)

	Keysborough	Chelsea Heights	Carrum Downs	City of Greater Dandenong	Metro Melbourne
2001	140,000	166,300	151,000	133,500	230,000
2002	185,000	191,000	143,000	139,000	260,000
2003	242,500	245,000	189,000	165,000	275,000
2004	237,000	190,000	223,500	180,000	275,000
2005	235,000	245,000	231,000	185,000	285,000
2006	242,000	325,000	245,000	200,000	305,000
2007	282,000	342,000	239,000	225,000	340,000
2008	247,500	302,500	253,000	250,000	355,000
2009	348,000	325,000	270,000	284,950	385,000
2010	420,000	375,000	299,500	315,000	430,000
2011	344,500	392,000	308,000	305,000	425,000
% Growth p.a	9%	9%	7%	9%	6%

Source: DSE Guide to Property Values (2011)

3.6. VACANT LAND PRICE

The median vacant land price in the City of Greater Dandenong was \$275,000 in 2011, higher than Metropolitan Melbourne (\$210,000). This may be partly due to vacant lot sizes in Greater Dandenong being larger than the metropolitan average.

3.6.1. COMMERCIAL AND INDUSTRIAL LAND PRICE

Commercial and industrial property sales data in the municipality for the period 2007-2011 shows that the value of factory space (\$/sqm) increased by 16%, while warehouse space was relatively constant. Over the same period, the value of commercial shops per sqm increased substantially by 95%.

TABLE 4 GREATER DANDENONG COMMERCIAL & INDUSTRIAL LAND SALES 2007-2011

	2007		2011	
	No. of Sales	Price per sqm (\$/sqm)	No. of Sales	Price per sqm (\$/sqm)
Factory	120	\$273.64	54	\$319.06
Shop	30	\$849.42	17	\$1662.61
Warehouse	21	\$350.59	27	\$358.80

Source: DSE Guide to Property Values (2011)

3.7. GREEN WEDGE PROPERTY

The Green Wedge property market was analysed through consultation with local real estate agents and online property searches.

Property prices within the Green Wedge are relatively high due to large lot sizes. Prices for a 5 acre (2ha) vacant lot are approximately \$650,000, and a 2ha property with a house can range from \$800,000 to \$1.5 million. Real estate agents reported that prospective buyers include church groups, overseas buyers, and residential buyers seeking a rural lifestyle. The following table presents selected Green Wedge properties which are currently or on the market or have been sold in recent years.

TABLE 5 SELECTED GREEN WEDGE PROPERTY TRANSACTIONS

Address	Size (ha)	Description	Estimated Value (\$)
*Lot 10 Keys Road, Keysborough	7.6ha	Vacant land with significant drainage constraints	\$1.2 million
*Lot 11 Keys Road, Keysborough	8ha	Vacant land with significant drainage constraints	\$1.4 million
Lot 12 Keys Road, Keysborough	6ha	Vacant land	\$1.6 million
31 Elms Road, Bangholme	2ha	Vacant land	\$650,000 - \$690,000
11 Green Patch Drive, Bangholme	5ha	5 bedroom house with attached hobby farm and horse paddock	\$1.4 million
6 Rustic Drive, Bangholme	Unknown	Mobile home in the Willow Lodge Retirement Village	\$50,000

*Approximate purchase price 3-4 years ago

Source: Realestate.com.au (2013), Consultation with real estate agents (2013)

Vacant land values within the Green Wedge were compared to vacant land values in the surrounding area to provide insights into the impact of Green Wedge zoning restrictions on land values. Information was gathered from the Dandenong South Industrial Area Extension Development Contributions Plan which provides estimates for vacant land value, consultation with real estate agents, as well as online property searches.

The indicative value of land within the Green Wedge Zone generally ranges from \$15 per sqm for flood prone land to \$33 per sqm, significantly lower than the surrounding residential land which ranges from \$449 - \$671 per sqm (vacant lot price), and industrial land which ranges from \$72 - \$110 per sqm (broadhectare). This indicates that Green Wedge zoning generally results in a significantly lower land value reflecting the limitations on development and subdivision

TABLE 6 VACANT LAND VALUE

Land	Zone	Price per sqm (\$/sqm)
Green Wedge Land	GWZ	\$15 - \$33
Dandenong South Industrial Area Extension	IN1Z	\$72
241 Perry Road, Keysborough	IN1Z	\$110
Sandhurst Residential Development	R1Z	\$449 - \$515
Marriott Waters Estate, Lyndhurst	R1Z	\$671
Meridian, Dandenong South	R1Z	\$577 - \$635

Source: Dandenong South Industrial Area DCP Valuation Report (2013), Realestate.com.au (2013)

3.8. LAND OWNERSHIP PATTERN

The land ownership pattern within the Green Wedge contains a mixture of public land, private land and land held by trusts (cemeteries). Private land consists of some large parcels being held for investment purposes (both residential and industrial interests) which are either vacant or used for low-value activities, and long term business and residential owners. There is fragmented ownership in many areas, especially in the Wetlands Precinct.

3.8.1. CROWN LAND

Consultation was undertaken with the Department of Environment and Primary Industry (DEPI) to identify Crown land reservations in the Green Wedge, as shown in Table 8.

There are 13 Crown land parcels in the Green Wedge study area reserved for a range of purposes including cemeteries, government roads and public purposes (e.g. drainage). Melbourne Water was listed as the delegated manager for many of the parcels; however, in many cases the land was not actively managed.

Three parcels of land were listed as having interest from the Department of Treasury and Finance (DTF), meaning that they have been identified as surplus to government requirements and may be sold. However, DEPI indicated that these parcels were considered

low-priority in terms of land sales, with no immediate plans to sell land within the Green Wedge.

TABLE 7 CROWN LAND RESERVATIONS

Allotment	Parish	Reservation	Size (ha)	Land Manager	Description
2198	Lyndhurst	Cemetery Purposes	99.95	DHS	Bunurong Cemetery
2030	Lyndhurst	Cemetery Purposes	50.34	DHS	Chevra Kadisha Cemetery
2074	Lyndhurst	Unreserved	40.54	Melbourne Water	Path adjacent to Patterson River
109A	Lyndhurst	Unreserved	0.18	Melbourne Water	Path adjacent to Patterson River
109B	Lyndhurst	Unreserved	0.19	Melbourne Water	Part of Patterson River
109C	Lyndhurst	Unreserved	14.5	Melbourne Water	Part of Patterson River
69A	Lyndhurst	Government Road	10.48	Melbourne Water	Road in Buffers Precinct
2016	Lyndhurst	Unreserved	0.70	Melbourne Water	Unmade road
95A	Eumemmerring	Public Purposes	0.76	Melbourne Water	Pillars Road drain
87A	Dandenong	Dual Status: Government Road and Public Purposes	1.38	Melbourne Water	Partially constructed road
60A	Dandenong	Unreserved	0.86	DTF	Unmade road
60B	Dandenong	Unreserved	0.62	DTF	Unmade road
60C	Dandenong	Unreserved	0.12	DTF	Unmade road

Source: Urban Enterprise (2013), DEPI (2013)

4. DEMOGRAPHIC PROFILE

4.1. INTRODUCTION

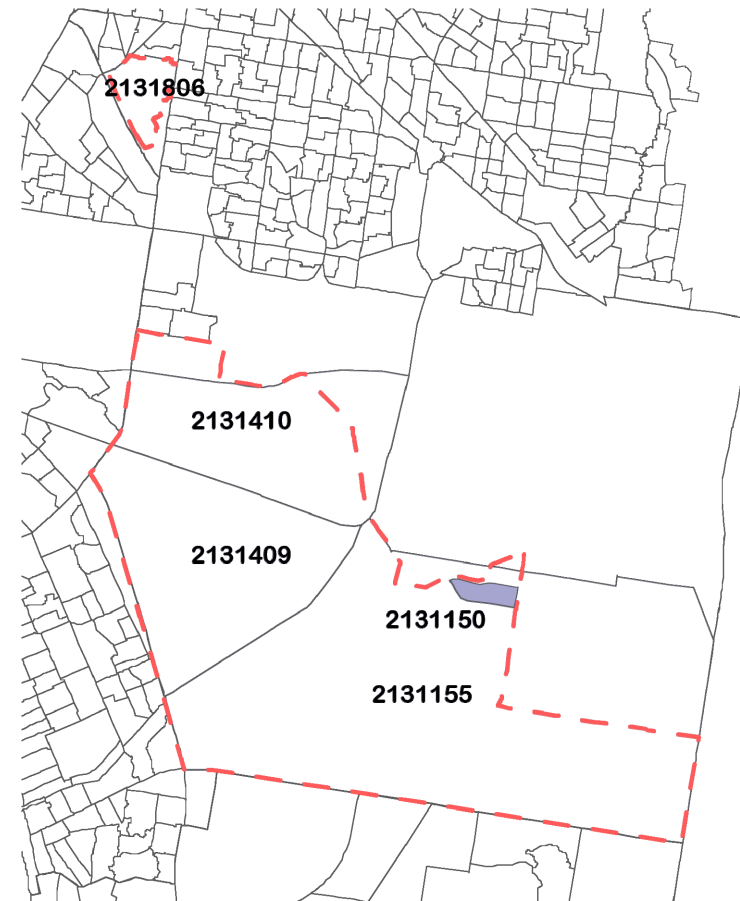
This section provides a demographic background of the Green Wedge study area. Demographic indicators for the Green Wedge are compared with Melbourne and Greater Dandenong to understand the unique characteristics of the Green Wedge and the broader trends which will influence the future development.

4.2. STUDY AREA

The Greater Dandenong Green Wedge falls within the Gr. Dandenong (C) Bal SLA (22674). Urban Enterprise has identified the following Statistical Area's 1 (SA1) that match the majority of the study area.

It should be noted that the north portion of the study site, centred on Clarke Road, contains a small urban area which falls outside of the study area but within the analysis boundaries adopted for this report.

FIGURE 8 SA1 BOUNDARIES ADOPTED FOR ANALYSIS



Source: Urban Enterprise (2013)

4.3. POPULATION

In 2011 the total resident population of the Green Wedge study area was 1,658 persons. As this includes a portion of urban area, the actual population of the Green Wedge is estimated to be approximately 1,100 persons. The Gr. Dandenong (C) Bal SLA has a population of 78,444.

TABLE 8 RESIDENT POPULATION IN GREEN WEDGE AND GR. DANDENONG SLA 2011

SA1/SLA	No. of Persons
2131150 (Willow Lodge Mobile Home Village)	512
2131155 (Thompson Rd)	130
2131409 (McMahens Rd - Pillars Rd)	158
2131410 (Hutton Rd)	243
2131806 (Clarke Rd, Spring Valley Reserve)	615
Green Wedge Study Area Total*	1,658*
Gr.Dandenong (C) Bal SLA	78,444

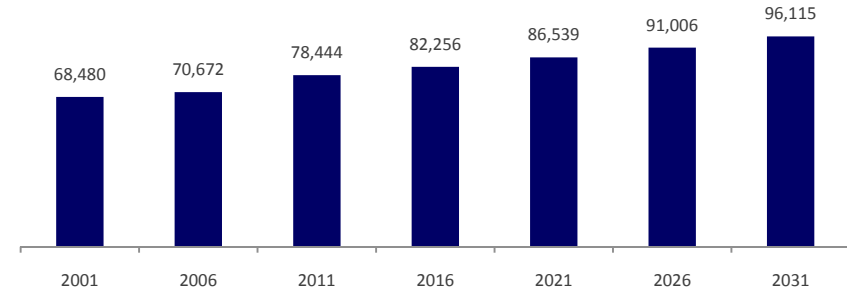
*The actual Green Wedge population is expected to be approximately 1,100 persons
Source: ABS Census (2011)

4.3.1. POPULATION GROWTH

The following graph and table show the projected resident population for the Gr. Dandenong (C) SLA and Metropolitan Melbourne by 2031. Population projection data is not available at the SA1 level.

The population of Gr. Dandenong (C) Bal SLA grew strongly between 2006 and 2011 (2.1%), indicating that urban development pressures in the area surrounding the Green Wedge are increasing. The average population growth rate for Gr. Dandenong (C) Bal SLA for the period 2001-2031 will be approximately 1.1% per annum. This is lower than the Metropolitan Melbourne average growth rate of 1.6% per annum. It is estimated that population in Gr. Dandenong (C) Bal SLA will reach 95,115 residents by 2031.

FIGURE 9 POPULATION GROWTH IN GR. DANDENONG (C) BAL SLA 2001-2031



Source: ABS Census (2011), VIF (2011)

TABLE 9 POPULATION PROJECTIONS 2001-2031

	Gr. Dandenong (C) Bal SLA		Metropolitan Melbourne	
	No. Persons	Ave.% Growth p.a Over Previous 5 Years	No. Persons	Ave.% Growth p.a Over Previous 5 Years
2001	68,480	-	3,338,704.00	-
2006	70,672	0.6%	3,592,591.00	1.5%
2011	78,444	2.1%	4,137,432	2.9%
2016	82,256	1.0%	4,483,604	1.6%
2021	86,539	1.0%	4,808,836	1.4%
2026	91,006	1.0%	5,118,448	1.3%
2031	96,115	1.1%	5,411,938	1.1%
Average % Growth p.a	-	1.1%	-	1.6%

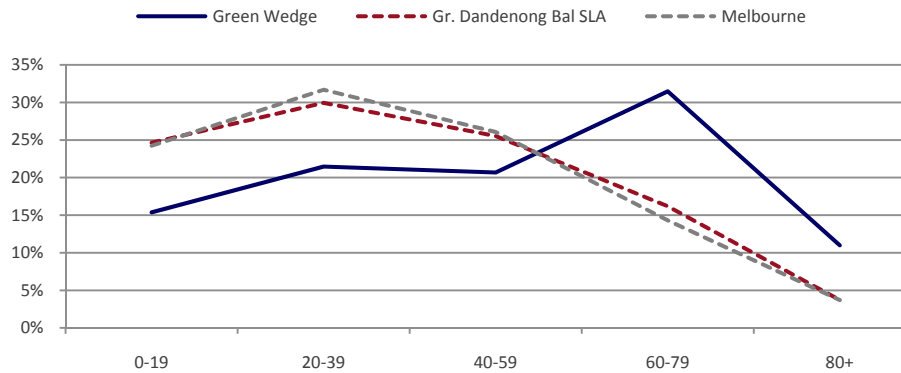
Source: ABS Census (2011), VIF (2011)

4.4. AGE PROFILE

The age profile of the Green Wedge shows an over-representation of residents over 60 years of age. Over 40% of residents are aged over 60 years old, substantially higher than Gr. Dandenong (C) Bal SLA (20%) and Metropolitan Melbourne (18%). This is mainly due to the presence of the retirement village at Willow Lodge within the Green Wedge.

The age profiles of Gr. Dandenong Bal. SLA and Metropolitan Melbourne are very similar with a high proportion of residents aged 20-39 years.

FIGURE 10 AGE PROFILE 2011

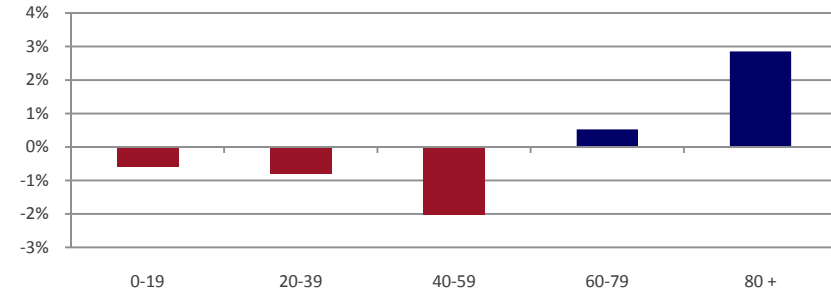


Source: ABS Census (2011)

Figure 10 shows projected change in age profile from 2011-2031 for the Gr. Dandenong (C) Bal SLA. The area will continue to age with the proportion of 80+ year old residents rising by 3% (net increase of 1,872 persons). The ageing of the population is a trend occurring throughout Australia.

Interestingly, the proportion of people within the main employment age groups (20-59) is projected to decrease.

FIGURE 11 % CHANGE IN AGE PROFILE FOR GR. DANDENONG (C) BAL SLA 2011-2031

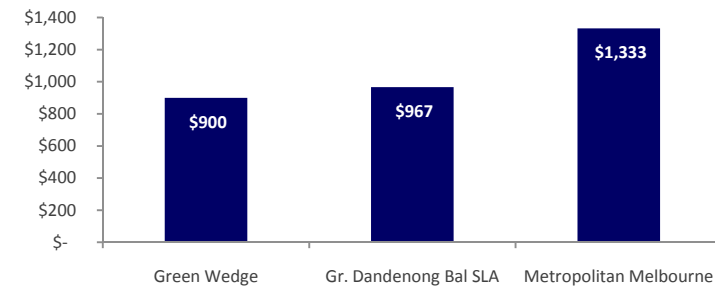


Source: VIF (2011)

4.5. HOUSEHOLD INCOME

The median weekly gross household income for the Green Wedge was \$900 in 2011, lower than the Gr. Dandenong (C) Bal SLA (\$967), and substantially lower than Metropolitan Melbourne (\$1,333). The lower household income reflects the presence of the Willow Lodge Retirement Village and the age profile of residents.

FIGURE 12 WEEKLY HOUSEHOLD INCOME



Source: ABS Census (2011)

4.6. HOUSEHOLD SIZE

In 2011 there were 760 households within the Green Wedge with an average household size of 1.92 persons. This is much lower than Gr. Dandenong (C) Bal SLA (2.80) and Metropolitan Melbourne (2.60) average household size, mainly due to the Willow Lodge retirement village which has the greatest concentration of households in the Green Wedge (362) and an average household size of 1.29. If Willow Lodge was excluded from the analysis, then the average household size of the Green Wedge would be 2.55, which is comparable to Metropolitan Melbourne (2.60).

Household size is expected to decrease over time with VIF projections showing an average household size of 2.74 in Gr. Dandenong (C) Bal SLA, and 2.52 in Metropolitan Melbourne by 2031.

TABLE 10 HOUSEHOLD SIZE 2011

	No. of Households	Average Household Size
2131150 (Willow Lodge Mobile Home Village)	362	1.29
2131155 (Thompson Rd)	47	2.53
2131409 (McMahens Rd - Pillars Rd)	69	2.41
2131410 (Hutton Rd)	78	2.92
2131806 (Clarke Rd, Spring Valley Reserve)	204	2.34
Green Wedge Study Area	760	1.92
Gr. Dandenong (C) Bal SLA	22,175	2.80
Metropolitan Melbourne	1,636,167	2.60

Source: ABS Census (2011)

4.7. DWELLINGS

The Green Wedge study area had a total of 760 dwellings in 2011.

Almost half the dwellings in the Green Wedge are located within the Willow Lodge Mobile Home Village, and which are classified as 'caravan or cabin' dwellings.

There are a large number of dwellings in the northern portion of the study area, centred on Clarke Road. This is due to the anomaly of census boundaries not corresponding with the study site and it is likely that the majority of these dwellings are not within the Green Wedge. However, it does demonstrate that there is a demand for semi-detached dwellings on the edge of the Green Wedge.

By not counting the urban area outside the Green Wedge and the Willow Lodge Mobile Home, the estimated number of dwellings within the Green Wedge is 196, almost all of which are detached houses.

TABLE 11 GREEN WEDGE DWELLING STRUCTURE 2011

	Separate House	Semi-detached, row or terrace house etc.	Flat, unit or apartment	Caravan or cabin	Total
2131150 (Willow Lodge Mobile Home Village)	0	0	0	361	361
2131155 (Thompson Rd)	44	0	3	0	47
2131409 (McMahens Rd - Pillars Rd)	70	0	0	0	70
2131410 (Hutton Rd)	79	0	0	0	79
2131806 (Clarke Rd, Spring Valley Reserve)	42*	145*	16*	0	203*
Green Wedge Study Area	235	145	19	361	760

*The majority of these dwellings are most likely outside the Green Wedge

Source: ABS Census (2011)

Table 13 summaries the dwelling proportions for Gr. Dandenong (C) Bal SLA over the period 2001-2011, and shows a general trend across Greater Dandenong and Melbourne for greater numbers of semi-detached, and flat, unit or apartment type dwellings.

TABLE 12 GR. DANDENONG (C) BAL SLA % DWELLING STRUCTURE 2001 – 2011

	Separate House	Semi-detached, row or terrace house etc.	Flat, unit or apartment	Other
2001	71%	7%	13%	3%
2006	72%	7%	20%	1%
2011	69%	11%	18%	2%

Source: ABS Census (2001, 2006, 2011)

Of the occupied dwellings in the Green Wedge, 53% were owned outright, 17% were subject to a mortgage, and 15% were rented. Compared with Gr. Dandenong (C) SLA there is a low proportion of renters, and the actual value would be lower as the majority of renters are in the Clarke Road portion of the analysis area and most likely outside the Green Wedge.

TABLE 13 TENURE TYPE 2011

	Green Wedge	Gr. Dandenong (C) Bal SLA	Metropolitan Melbourne
Owned outright	53%	30%	33%
Owned with a mortgage	17%	29%	37%
Rented	15%	36%	27%
Other tenure type	2%	1%	1%

Source: ABS Census (2011)

4.8. EMPLOYMENT

Employment data for the Green Wedge was compared with the Dandenong Statistical Area 3 (SA3), and Metropolitan Melbourne.

4.8.1. RESIDENT EMPLOYMENT

According to the 2011 Census, within the Green Wedge 596 people reported being in the labour force. Of these 6.3% were unemployed, 61.5% were employed full-time, and 25.1% were employed part time. The low labour force participation of in the Green Wedge (36%) is mainly due to the high proportion of older retirees. The unemployment rate is lower than Greater Dandenong (8.2%) but higher than Metropolitan Melbourne (5.5%)

The major industry of employment for Green Wedge residents in 2011 was manufacturing, employing 22% of residents, followed by retail trade (12%), construction (11%), and health care and social assistance (7%). Despite the Green Wedge containing a number of agricultural areas only 3% of residents are employed in agriculture (18 residents). However, this is still higher than the Greater Dandenong and Melbourne averages.

Manufacturing is the dominant employment industry in the Greater Dandenong area; however economic shifts have seen the industry decline in recent years from employing 30% of residents in 2006 to 22% in 2011. Industries which are expected to grow in the future include professional services, and health care due to the ageing population.

TABLE 14 RESIDENT INDUSTRY OF EMPLOYMENT 2011

	Green Wedge	Dandenong (SA3)	Metropolitan Melbourne
Manufacturing	22%	22%	11%
Retail Trade	12%	11%	11%
Construction	11%	7%	8%
Health Care and Social Assistance	7%	10%	11%
Transport, Postal and Warehousing	6%	6%	5%
Other Services	6%	4%	4%
Professional, Scientific and Technical Services	6%	5%	9%
Education and Training	5%	5%	8%
Wholesale Trade	5%	6%	5%
Agriculture, Forestry and Fishing	3%	1%	1%
Financial and Insurance Services	3%	4%	5%

*Values are the % of employed residents in the labour force
Source: ABS Census (2011)

The majority of residents in the Green Wedge are employed as technicians and trade workers (18%), and clerical and administrative workers (16%). There are a much lower proportion of professionals in the Green Wedge and Greater Dandenong compared to Melbourne, and much higher proportion of machinery operators and drivers due to the prominence of the manufacturing sector.

TABLE 15 RESIDENT OCCUPATION TYPE 2011

	Green Wedge	Dandenong (SA2)	Metropolitan Melbourne
Technicians and Trades Workers	18%	16%	14%
Clerical and Administrative Workers	16%	14%	16%
Professionals	13%	14%	25%
Machinery Operators and Drivers	13%	13%	6%
Labourers	13%	16%	8%
Managers	12%	8%	13%
Sales Workers	8%	10%	10%
Community and Personal Service Workers	7%	9%	9%

*Values are the % of employed residents in the labour force
Source: ABS Census (2011)

4.9. KEY FINDINGS

The key findings which will influence future development within the Green Wedge include:

- The population of the Green Wedge study area was 1,658 persons in 2011 (actual Green Wedge population is estimated at 1,100 persons). The majority of residents were located in the Willow Lodge Mobile Home (512). The Greater Dandenong area is expected to grow at a steady rate of 1.1% per annum between 2011 and 2031 (VIF 2012).
- There are a high proportion of older residents (65+ years) within the Green Wedge due to the presence of the retirement village. The age profile of Greater Dandenong is expected to further age over the next 20 years.
- The average household size in the Green Wedge is 1.92, much smaller than the Greater Dandenong average of 2.80 due to the high proportion of residents in the retirement village.

- The majority of dwellings in the Green Wedge are located in the Willow Lodge Mobile Home (361 dwellings). Not counting the mobile home, the actual number of dwellings within the Green Wedge is estimated at 196, almost all of which are detached dwellings. Over the last decade there has been increasing proportions of semi-detached, and apartment, unit or flat type dwellings in the Dandenong LGA and in Metropolitan Melbourne in general.
- 'Manufacturing' is the major employer of Green Wedge residents employing 22% of the working population. 'Retail Trade', 'Construction' and 'Health Care and Social Assistance' are also major industries of employment for Green Wedge residents. 'Agriculture' employs only 3% of the Green Wedge population.

5. IMPLICATIONS FOR THE GREEN WEDGE MANAGEMENT PLAN

The background research and data analysis identifies the following issues which will need to be considered as part of the Green Wedge Management Plan:

- Many existing land users in the Green Wedge are significant in terms of land consumption and the local and regional economy. A number of businesses have invested heavily in their current facilities and infrastructure, and are likely to be long term occupiers of the area. This reflects that the Green Wedge is an appropriate location for many businesses and users and indicates that other similar uses could be viable if appropriate sites, suitable land values and strong policy support are maintained.
- The area surrounding the Green Wedge has a strong focus on industrial/business land uses with the neighbouring Dandenong South Industrial Precinct playing a significant role in the State economy. Demand for industrial land is expected to continue in the future driven in part by the proximity to Eastlink and the newly constructed Peninsula Link. This proximity results in attractiveness of the Green Wedge land for both urban and rural industrial and business uses.
- The population of the Dandenong Balance Statistical Local Area (including the Green Wedge) grew strongly between 2006 and 2011 (2.1%), and is projected to grow at a steady rate of 1.1% per annum to 2031 (VIF 2012). Continued population growth is expected to place urban growth pressures on the Green Wedge with a number of new residential estates establishing on the border, increasing the likelihood of land speculation and subsequent increases in land values within the Green Wedge in excess of typical non-urban values.
- A small but relatively concentrated population resides within the Green Wedge, predominantly within the Willow Lodge Mobile Home. The need to protect the amenity of these residents should be considered in the ongoing management of the area.
- House values within the Green Wedge generally reflect two contrasting property sub-markets: a high value environmental residential location in the Wetlands Precinct, where house values typically exceed \$1m, well above the municipal median of \$415,000; and the Willow Lodge Mobile Home Village, which provides affordable housing to retirees at

the low end of the property market. In this respect, the Green Wedge provides important differentiation from the urban areas of the municipality - these existing aspects of the current land use should be protected and enhanced where possible through the Management Plan. This is particularly relevant in terms of affordable housing, the lack of which is a common issue across Melbourne, and the need for which will increase over time due to the projected ageing population in Greater Dandenong;

- As the area surrounding the Green Wedge continues to urbanise, the role of the Green Wedge in supporting community and institutional uses for which suitable sites in urban areas are not available will become more important. The availability of Green Wedge land may be limited by land speculation - it is important that the Green Wedge Management Plan provides clear guidance on the preferred vision and uses within each precinct to minimise incentives for speculation.
- The Green Wedge provides a logical location for rural businesses which are not suited to urban areas. This includes activities which are land-intensive and require large buffer distances. The presence of the ETP and the restrictions on intensive development within the buffer zone provides the opportunity to consolidate rural uses in the area.
- There is evidence of land banking and speculation within the Green Wedge with some large land holdings owned by developers, as well as investors purchasing and holding vacant land with the expectation of future rezoning. The prospect of ongoing speculation will need to be addressed in the Green Wedge Management Plan by sending a clear signal to the property market on the future vision of the Green Wedge and guidelines controlling undesirable uses.