

Brighton Hub Structure Plan

Industrial Land Supply and Demand Assessment

Prepared by Urban Enterprise for Niche Planning Studio

June 2026

Acknowledgment of Country

We acknowledge the traditional custodians of the land on which we work and pay our respects to their Elders past and present.

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1. Introduction

1.1. Background

The Brighton Hub (the Hub) is a Regionally Significant Industrial Precinct (RSIP) located in Bridgewater in the Brighton Local Government Area.

The Hub is situated approximately 22 km north of central Hobart, and is the Southern Region's major intermodal hub, providing critical road and rail freight access for transport, freight, logistics, distribution and warehousing operators.

The Hub is in a highly strategic location, with access to the Midland Highway and north-south rail connections that extend to the northern region of Tasmania.

Currently, there is no strategic framework guiding the future growth and development of the Hub. It is within this context that Brighton Council (Council) and the Department of State Growth (DSG) have commissioned a 20-year Structure Plan for the Hub.

The Structure Plan is being led by Niche Planning Studio, with economic and property market input from Urban Enterprise.

1.2. Engagement & Scope

Urban Enterprise have been engaged to prepare an industrial land supply and demand assessment to inform the Structure Plan for Brighton Hub.

The scope of this assessment includes the following:

- Identify and discuss the economic attributes of the Hub that are advantageous to industrial businesses.
- Summarise the strategic and policy context for the Hub, and summarise existing priorities for land use and development.
- Profile the local and regional economy to identify industry drivers and economic specialisations, and assess macroeconomic trends that could have implications for industrial land in the Hub.
- Provide an overview of the current businesses profile and mix within the Hub, noting lot sizes and business types.
- Assess industrial zoned land supply in the Hub:
 - Estimate the quantum of land supply that is currently vacant and/or underutilised, and therefore a theoretical candidate for future consumption and development.
 - Identify vacant and broadhectare sites with the potential for future consumption.
- Assess headline indicators for industrial demand in the region, including population, employment and business growth for industrial-related industry sectors.
- Analyse historical industrial land consumption activity and trends. Identify and assess recent examples of industrial subdivision and development in the Hub.

- Consult with key landowners, developers and agents to gather market commentary and insights into the demand profile, as well as any development issues and opportunities in the Hub.
- Summarise findings in respect of land supply and demand in the Hub to inform the Structure Plan.

1.3. Consultation Summary

This assessment is informed by targeted consultation with landowners, developers and agents, as well as Brighton Council.

Stakeholder consultation was designed to obtain insights and views regarding:

- The property and location characteristics of the Hub that are favourable to the market;
- The adequacy of land supply and development intentions for strategic landholdings;
- Development barriers, constraints and opportunities across the Hub; and
- The strength and profile of demand for industrial land in the Hub.

1.4. Study Area

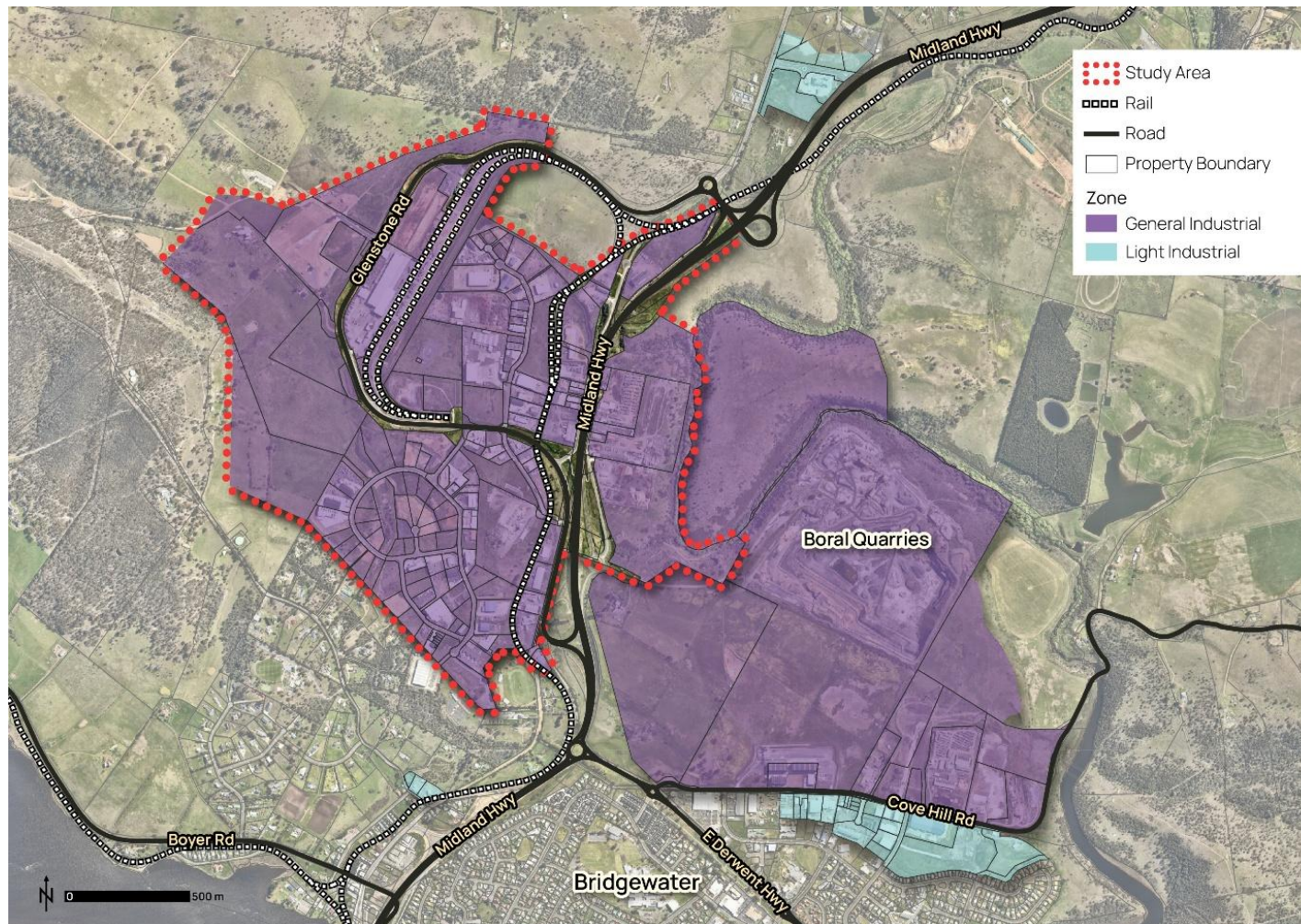
The Structure Plan study area is shown in Figure 1.

The study area broadly corresponds with the Brighton Industrial Hub Specific Area Plan (SAP) overlay area; but excludes the Boral quarry land to the east.

The General Industrial zone (GIZ) applies to the majority of the study area, and extends to the east of the study area; encompassing large tracts of land north of Cove Hill Road in Bridgewater.

South of Cove Hill Road, there is some Light Industrial zoned (LIZ) land that accommodates demand from local population service-industrial users.

Figure 1: Study Area



Source: Urban Enterprise, 2026

2. Strategic & Economic Context

2.1. Introduction

This section provides the strategic and economic context that is relevant to the Hub, including:

- An overview of the Hub and its location;
- The economic and strategic role of the Hub;
- Existing issues and challenges facing development and growth;
- The current business profile and lot mix;
- A SWOT analysis; and
- Existing strategic priorities for the Hub.

It is important to note that the Tasmanian Statewide Industrial Strategy (SIS) was released in December 2025, and includes economic and strategic analysis that is relevant to Brighton Hub. Some of this information is referenced throughout this section.

2.2. Regional Context

The Brighton Hub is designated as a Regionally Significant Industrial Precinct (RSIP), and is the Southern Tasmanian region's primary intermodal logistics and industrial hub.

The Hub is located in Bridgewater within Brighton Council; approximately 22 km north of central Hobart. The Hub is strategically located at the interface of metropolitan Hobart and regional areas in central Tasmania.

The Hub is situated adjacent to the Midland Highway and the north-south rail line, providing very good access to principal freight routes connecting southern Tasmania with the State's northern ports (e.g. Bell Bay, Burnie and Devonport). As a result, the Hub is an ideal location for regionally and state significant transport and export-oriented businesses operating in the freight, transport, distribution, logistics, civil construction and manufacturing sectors.

According to the SIS, there are approximately 1,040 jobs across the sectors of transport and warehousing, construction, wholesale trade and manufacturing.

Figure 2: Regional Context, Brighton Hub



Source: Urban Enterprise, 2026

2.3. Economic Profile: Brighton & Southern Region

The Hub performs a regionally significant economic role, and thus serves a catchment that extends across the Southern Tasmania region.

For the purpose of profiling and assessing the economy, a local (Brighton LGA) and regional (Southern Tasmania) catchment have been adopted, and benchmarked with the State of Tasmania where relevant.

Table 1 summarises key economic metrics for Brighton LGA, Southern Tasmania and Tasmania as at 2024 financial year, and the extent of change that has occurred over a 5-year period (i.e. since 2019). Table 2 summarises economic metrics for all nineteen industry sectors.

Key observations are as follows:

- In 2024, the Brighton LGA generated a Gross Regional Product in the order of \$0.92 billion, \$1.95 billion in output, \$315m in export value and \$767m in value-added.
- Brighton LGA accommodates approximately 5,680 local jobs and 775 businesses.
- Between 2019 and 2024, Brighton's economic contribution increased significantly, with:
 - GRP growth of +70%;
 - Output growth of +105%;
 - Export value growth of +44%;
 - Value-add growth of +94%.

These growth rates significantly outpaced both Southern Tasmania and the State.

- The key industry drivers in Brighton LGA are primarily industrial-related sectors and population-service sectors.
- Construction generates the largest share of annual output (59%), value-add (47%), employment (24%) and businesses (30%). Notable construction sub sectors include 'heavy and civil engineering' and 'construction services'.
- Other economically important industries in Brighton include 'transport, postal and warehousing', 'manufacturing' and 'healthcare and social assistance'.
- Industrial-related sectors in Brighton are the main drivers of the local economy. In aggregate, these sectors account for 83% of output, 85% of export value, and 72% of value add.

Table 1: Economic metric summary, Brighton LGA & Southern Region, 2019-24

	Brighton LGA		Southern Tasmania		Tasmania	
	Total	Change (2019-24)	Total	Change (2019-24)	Total	Change (2019-24)
GRP (\$m)	924	+70%	21,437	+12%	40,460	+12%
Output (\$m)	1,959	+105%	37,096	+11%	71,104	+12%
Export value (\$m)	315	+44%	15,317	+8%	29,099	+5%
Value-added (\$m)	767	+94%	18,275	+14%	34,696	+15%
Employment	5,687	+53%	155,993	+15%	290,728	+13%
Businesses	775	+20%	22,779	+10%	44,080	+9%

Source: State Growth Tasmania Economy Id, FY2019 – FY2024.

Table 2: Economic metric summary (by industry), Brighton LGA & Southern Region, 2024

Industries	Output		Exports		Value-added		Employment		Businesses	
	#	%	#	%	#	%	#	%	#	%
Construction	1,147	59%	2	1%	361	47%	1,358	24%	235	30%
Transport, Postal and Warehousing	225	11%	140	44%	94	12%	750	13%	84	11%
Manufacturing	139	7%	81	26%	42	5%	357	6%	32	4%
Health Care and Social Assistance	83	4%	4	1%	60	8%	507	9%	47	6%
Retail Trade	65	3%	20	6%	41	5%	577	10%	39	5%
Wholesale Trade	64	3%	18	6%	36	5%	264	5%	15	2%
Education and Training	46	2%	4	1%	34	4%	493	9%	10	1%
Public Administration and Safety	39	2%	2	1%	21	3%	178	3%	3	0%
Agriculture, Forestry and Fishing	32	2%	26	8%	11	1%	244	4%	46	6%
Other Services	27	1%	2	0%	17	2%	222	4%	53	7%
Accommodation and Food Services	23	1%	3	1%	12	2%	260	5%	31	4%
Arts and Recreation Services	20	1%	8	3%	10	1%	165	3%	9	1%
Administrative and Support Services	20	1%	2	1%	12	2%	144	3%	44	6%
Professional, Scientific & Technical Services	13	1%	1	0%	7	1%	82	1%	68	9%
Electricity, Gas, Water and Waste Services	7	0%	0	0%	2	0%	34	1%	8	1%
Information Media and Telecommunications	4	0%	0	0%	2	0%	13	0%	3	0%
Mining	3	0%	2	1%	2	0%	23	0%	3	0%
Financial and Insurance Services	3	0%	0	0%	2	0%	9	0%	7	1%
Rental, Hiring and Real Estate Services	1	0%	0	0%	1	0%	7	0%	38	5%
Total industries	1,959	100%	315	100%	767	100%	5,687	100%	775	100%
Industrial-related Sectors*	1,617	83%	269	85%	549	72%	3,030	53%	423	55%

Source: State Growth Tasmania Economy Id, FY2019 – FY2024.

2.4. Statewide Industrial Strategy: Brighton Hub

The SIS outlines the strategic role and advantages of the Hub, the specific issues and challenges relevant to development, and provides a SWOT analysis (see Table 3).

Strategic Role

“Brighton Hub is Southern Tasmania’s primary intermodal logistics hub, supporting freight movement between the northern ports and southern Tasmania via rail and road transport. It plays a critical role in regional supply chains, accommodating warehousing, construction, and logistics businesses.” (SIS, p. 83)

Advantages

The Hub has a suite of attributes that are favourable for industrial land users, and provide strong market appeal, including:

- Access to major road and rail freight avenues such as the Midland Highway and the Brighton Intermodal Freight Terminal; providing critical connection to northern Tasmania.
- Proximity to Greater Hobart and Hobart airport.
- Large tracts of vacant industrial zoned land supply.
- Existing services such as electricity, water and natural gas.
- Appropriate buffers and separation from sensitive urban interfaces.

Issues and Challenges

- Landowner fragmentation and examples of inactive planning/development activity for strategic landholdings.
- Some infrastructure constraints, particularly water, wastewater, and power.
- Physical and environmental challenges, including bushfire-prone areas, topography, landslip hazards, and sensitive vegetation and heritage sites.
- Examples of smaller subdivisions and businesses that conflict with larger freight, logistics, distribution and manufacturing businesses.

Table 3: SWOT, Brighton Hub

SWOT Components		Description
Internal	Strengths	• Strategically located intermodal hub with integrated rail and road access, enabling efficient freight movement between northern ports and southern Tasmania. • Strong transport, postal, and warehousing industries, supported by key logistics businesses (e.g., SRT Logistics, Tasfreight). • Large available lots (60% of large lots in three key sites), suitable for medium-to-large-scale industrial operations. • Proximity to main highways, railways, and within 30 minutes of the nearest airport. • Proximity to population (housing) and activity centres (Brighton). • Established infrastructure and utility access, accommodating current development levels.
	Weaknesses	• Shortfall of suitable vacant industrial land to accommodate future growth. • Limited landowner engagement; reluctance to subdivide or develop remaining land. • With suitable vacant land actually being developed, prevalence of smaller subdivided lots (3,000–7,000 sqm), despite demand for larger lots (2–5 ha) (based on take-up since last study). • Quarry site constraints, with significant attenuation zones and owner resistance to development near mining lease areas. • Environmental challenges, including bushfire-prone areas, landslip hazards, and sensitive vegetation and heritage sites. • Low prioritisation in improving landscaping and placemaking at Brighton Hub.
External	Opportunities	• Growing demand for larger lots, with increasing development applications (15–20 annually compared to 4–5 previously). • Potential for circular economy initiatives (e.g., hydrogen, recycling, new waste transfer station). • Development potential at the edges of the quarry sites and underutilised areas. • Strong growth in transport-related industries (+118% in transport jobs from 2011–2021). • Updated structure planning to ensure alignment with market demands and environmental considerations. • Completion of Bridgewater Bridge will improve accessibility and connectivity.
	Threats	• Competition from other industrial precincts with larger lot availability and better infrastructure. • Environmental and planning constraints could delay or prevent necessary development. • Over-reliance on a few key landowners and businesses for precinct activation. • Increased strain on existing infrastructure (water, sewer, power) with rapid growth.

Source: SIS, 2025

2.5. Brighton Structure Plan

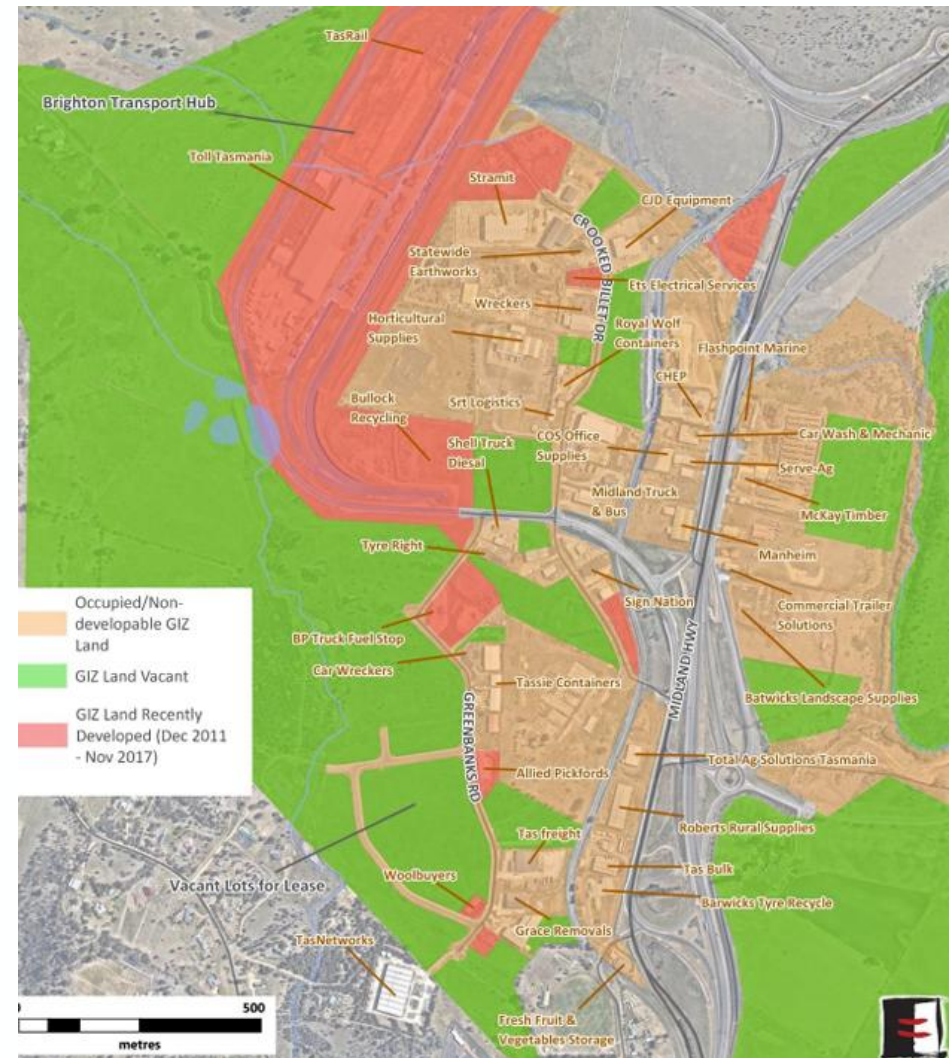
The Brighton Structure Plan was completed in 2018, and provides an overarching vision and strategic plan to guide growth and development of the municipality.

The Structure Plan was informed by an Economic Assessment, prepared by Essential Economics (2018). The assessment has regard to industrial land supply and demand, including the Brighton Hub.

The following points from the Economic Assessment are relevant:

- The Tasmanian economy is expected to continue to grow and attract investment. Maintaining a supply of industrial land in strategic locations in the Greater Hobart region will be important, including Brighton.
- The Brighton Hub is regionally significant, and should be viewed in the context of the Greater Hobart and state-wide industrial land needs.
- Industrial land in Brighton Council has the potential to attract business demand from local, regional and state-wide catchments.
- As at 2018, the assessment estimated that Brighton Council has approximately 301 ha of vacant industrial land (57% of total industrial land in the municipality). Based on the historical consumption rate, there was approximately 38 years of supply in the GIZ.
- Although very limited uptake had occurred in the Light Industrial Zone, the 6.8 ha of vacant supply may be insufficient if uptake levels were to increase.
- Given the excess supply of land in the GIZ, consideration may be given to rezoning some GIZ land in the Brighton Hub to LIZ. A potential area of GIZ land for rezoning is that land located directly north of the Midland Highway and west of Possum Road.
- Although the need for this to occur is uncertain given the apparent suitability GIZ land to accommodate surplus LIZ demand.
- Council should seek to encourage consolidated industrial land use patterns and efficient use of land in the Brighton Hub, noting that evidence of some fragmentation and inefficient use currently exists.

Figure 3: Industrial land supply, Brighton Structure Plan, 2018



Zone	Total Land	Vacant/Undeveloped (November 2017)	Annual Land Uptake (Dec 2011-Nov 2017)
General Industrial Zone	500.3ha	294.5ha	7.8ha
Light Industrial Zone	24.0ha	6.8ha	0.0ha*
Total	524.3ha	301.3ha	7.8ha

Source: Brighton Structure Plan Economic Assessment, 2018

2.6. Strategic Priorities for Brighton Hub

The SIS (2025) provides a statewide framework to guide the protection, planning and servicing of industrial land across Tasmania. Its purpose is to ensure there is sufficient, well-located and infrastructure-ready industrial land to support freight, advanced manufacturing, agribusiness and emerging green industries, while addressing infrastructure constraints and land supply shortfalls.

The SIS identifies the Brighton Hub as Southern Tasmania's premier intermodal logistics precinct and a critical industrial growth area for Greater Hobart. However, it notes that infrastructure limitations, particularly wastewater capacity, power supply and some site design considerations are constraining development potential across otherwise strategically located land. Brighton Hub is identified as a key overflow area for Greater Hobart.

To guide future growth, the SIS sets out a series of targeted strategic directions for the Brighton Hub, which are relevant to the Structure Plan:

- **Bolster Brighton Hub's Position as Southern Tasmania's Premier Intermodal Logistics Hub:** Protect and reserve rail-adjacent land for freight and logistics, optimise freight corridors, and reinforce Brighton Hub as the primary logistics gateway and overflow industrial area for Greater Hobart.
- **Promote Appropriate Lot Sizes to Support Logistics Growth:** Facilitate 2–5 hectare lots for strategic warehousing while maintaining flexibility for smaller or mixed lots and incentivise development through streamlined approvals or specific area planning.
- **Support Diversification Through Infrastructure Upgrades:** Upgrade wastewater and other utilities to attract advanced manufacturing, agribusiness, and green technology industries.
- **Explore Circular Economy and Green Industry Opportunities:** Enable hydrogen hubs, advanced recycling, and modern waste infrastructure to support circular economy and emerging green industries.
- **Plan for Future Industrial Land Supply:** Identify and potentially rezone additional land while balancing environmental and heritage considerations, applying buffer zones to protect industrial operations.

Figure 4: Strategic Principles, Brighton Hub

Strategic Principle		Details	Required Changes	Specific Observations
	Bolster Brighton Hub's Position as Southern Tasmania's premier intermodal logistics hub	Leverage integration of rail and road networks to attract freight, transport, and logistics businesses.	Ensure intermodal land is protected and reserved for logistics-specific businesses.	Implement structure planning to preserve rail-adjacent land and optimise freight corridors for seamless flow.
	Promote suitable lot-sized development, particularly ensuring land is available for businesses needing access to intermodal facilities, through structure planning and/or SAP	Enable subdivisions catering to 2–5 ha lots; maintain a mix of lot sizes to meet varied industry demands, but primarily logistics to accommodate strategic warehousing.	Encourage subdivision of larger lots (2–5 ha) while maintaining flexibility for mixed lot sizes.	Incentivise landowners to develop larger lots through streamlined approvals and/or specific area planning, such as a new strategic or structure plan.
	Explore and identify circular economy initiatives (Council)	Accommodate projects like hydrogen hubs, advanced recycling facilities, and a Council waste transfer station.	Invest in waste and recycling infrastructure; support hydrogen and green energy projects.	Establish partnerships for hydrogen hubs, advanced recycling, and a modern Council waste transfer station.
	Encourage diversification and growth of industries through adequate wastewater infrastructure provision	Support advanced manufacturing, agribusiness, and green technologies to create a resilient and diversified economy.	Identify and attract high-growth industries such as advanced manufacturing and agribusiness.	Launch targeted investment campaigns; provide infrastructure and utility upgrades tailored to these industries, specifically to address limited wastewater capacity in this area.

Source: SIS, 2025

Consultation Findings:

Location and Role of the Hub

- Consultees noted the advantageous location of the Hub, lending itself to a transport-oriented industrial precinct that can leverage the high-quality access to road and rail freight avenues, Greater Hobart and central Tasmania.
- Consultees noted that there is a current mismatch between the strategic vision for the Hub, the demand profile, and the development that is occurring on the ground.
- Although there are several transport, logistics, freight and distribution businesses in the Hub, the take-up from these sectors and larger users is relatively slow.
- The current business profile and typologies are mixed, with businesses across construction and civil, recycling and the circular economy, manufacturing, fabrication and warehousing, along with transport, logistics, freight and distribution.
- Consultees noted that the rail terminal is currently underutilised. This is attributed to greater efficiency (time and cost savings) to transport freight to northern Tasmania via the road network. However, consultees agreed that there is opportunity for the rail terminal to be utilised more in the future.

2.7. Key Points

- The Brighton Hub is designated as a Regionally Significant Intermodal Precinct (RSIP), and is Southern Tasmania's primary intermodal logistics and industrial hub.
- The Hub is in a highly strategic location, with excellent access to road and rail freight avenues, as well as proximity to Greater Hobart and areas of primary production (e.g. agriculture, energy, resources) in central Tasmania.
- The Hub is well positioned to accommodate regional, state and national scale export-oriented businesses that can leverage the advantageous location and existing infrastructure.
- The SIS acknowledges the regional importance of the Hub. The SIS prioritises the reservation of undeveloped vacant land for large lot sizes (2-5+ ha) to accommodate industrial users with requirements such as generous land areas, access, buffers and separation, and proximity to transport and freight networks.
- The Brighton Structure Plan (2018) notes that the Hub should be viewed in the context of the Greater Hobart and state-wide industrial land needs.

The supporting Economic Assessment discussed the potential to incorporate some LIZ land in the Hub; as a buffer to sensitive interfaces, and to serve overflow demand for light industrial uses in Brighton Council.

3. Industrial Land Supply

3.1. Introduction

This section provides an assessment of industrial land supply in the Brighton Hub to identify the location and estimate the quantum of vacant land that is practically available for future consumption.

3.2. Methodology

To assess industrial land supply in the study area, the following methodology has been adopted and applied:

- Define the spatial area to be assessed: Brighton Hub Structure Plan boundary.
- Define the planning zones to be included: General Industrial Zone (GIZ).
- Compile a detailed property database of all allotments (lots) in which the core zone applies.
- Categorise the occupancy status of lots: occupied, vacant or underutilised. The following occupancy definitions have been adopted and applied:
 - **Occupied:** An allotment where there is a structure, use or business activity that occupies the site. The lot appears to be highly utilised, with limited potential for further subdivision or consumption.
 - **Vacant:** an allotment where no structure, clear use or business activity is apparent on site.
 - **Underutilised:** an allotment where the majority of the site is vacant, but a small proportion is occupied by a structure or use. The lot appears to have surplus land which could potentially be consumed or subdivided in future.
- Using the most recent available satellite imagery (February 2026), manually verify the categorisation of sites.
- Using GIS, calculate the gross land area of all allotments by zone and occupancy category.

It is important to note that during the manual verification process, some parcels that are technically categorised as underutilised were re-categorised as vacant due to the significant land area and opportunity for future subdivision and development.

3.3. Business & Lot Profile

At present, the Brighton Hub accommodates a diverse mix of industrial businesses. The business profile is weighted towards transport, warehousing, logistics and distribution operators, alongside manufacturing, construction-related trades, storage, and logistics support services.

The Hub includes a combination of regional, state and nationally significant business that operate across freight, transport, logistics, distribution, manufacturing, recycling and waste, and civil construction.

Concurrently, there are a number of small to medium-sized industrial users such as construction contractors, equipment hire businesses, trade suppliers, engineering workshops and transport operators.

Larger-scale anchor businesses that are currently operating in the Brighton Hub include:

- **Team Global Express** – freight and logistics
- **Onetrak** – construction equipment supplier
- **SRT Logistics** – refrigerated transport service
- **Straightlink** – logistics service
- **Tasfreight** – logistics service
- **Nutrien Ag Solutions** – agricultural service

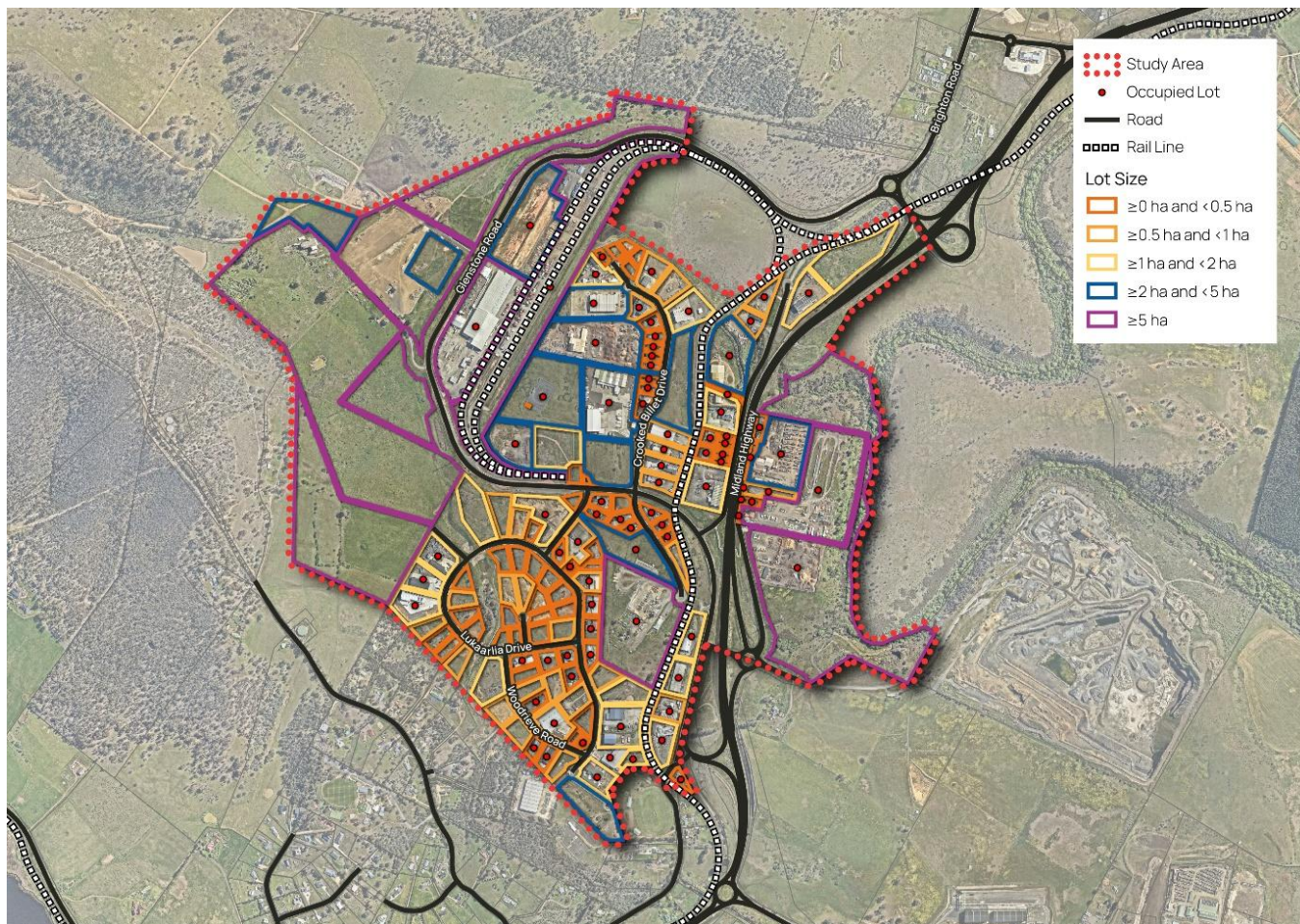
The existing lot mix is diverse, with a relatively even spread of small, moderate and larger allotments (see Figure 5).

Table 4 summarises the lot size ranges within the Study Area:

- 75 lots across more than 23 ha are less than 0.5 ha;
- A further 20+ ha across 30 lots are between 0.5 and 1 ha;
- 26+ ha across 19 lots are between 1 and 2 ha;
- 43+ ha across 15 lots are between 2 and 5 ha; and
- More than 130 ha across 10 lots are 5+ ha.

It should be noted that some of the large and extra-large lots that are 2+ha are vacant parent lots that have not been subdivided. These are mostly clustered in the north and north-west of the study area. This is assessed further in section 3.

Figure 5: Lot Size Mix, Study Area



Source: Urban Enterprise, 2026

Table 4: Lot Size Mix, Study Area

Lot Size Mix	Lot Count	Area (ha)
≥0 ha and <0.5 ha (small)	75	23.31
≥0.5 ha and <1 ha (moderate)	30	20.28
≥1 ha and <2 ha (moderate)	19	26.77
≥2 ha and <5 ha (large)	15	43.53
≥5 ha (extra large)	10	130.32

Source: Urban Enterprise, 2026

3.4. Industrial Land Supply Summary

There is approximately 250 ha of General Industrial zoned land in the study area.

An industrial land supply summary is provided in Table 5, and illustrated in Figure 6.

- 101 ha (40%) of land is occupied;
- 108 ha (43%) of land is vacant; and
- 33 ha of land is categorised as underutilised.

A further 6.6 ha of land is categorised as undevelopable, as it is currently encumbered or used for required infrastructure such as drainage basins.

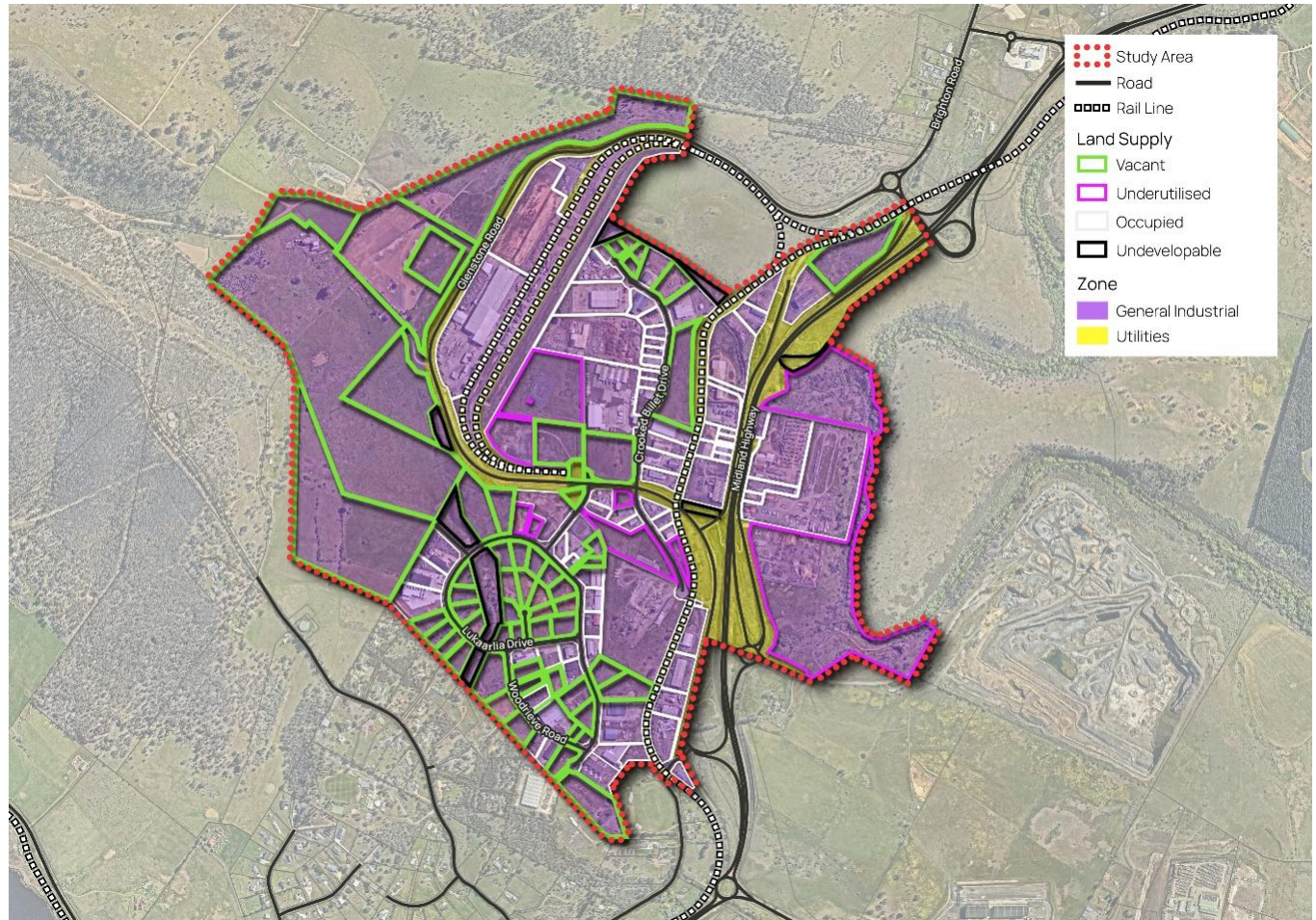
The study area has a good theoretical supply of vacant industrial land. However, a significant proportion of supply is clustered around the north and north-west of the study area. This area is yet to undergo land development, and appears to require infrastructure and servicing investment. Therefore, a notable proportion of gross land will be deducted for encumbrance, along with infrastructure such as roads and drainage.

Vacant land supply that appears to be ‘market ready’ and practically available for development is primarily concentrated around Lukaarlia Drive (30 lot subdivision), and the Greenbanks Road-Woodrrieve Road sub-precinct.

These areas are the current development fronts at the Hub, and are likely to serve demand over the short to medium term.

Recent subdivision and consumption activity in the Hub is assessed in Section 4.

Figure 6: Industrial Land Supply, Study Area



Source: Urban Enterprise, 2026

Table 5: Industrial Land Supply, Study Area

Land Supply	Lots	Gross Area (ha)
Vacant	59	108.41
Underutilised	8	33.83
Occupied	82	101.97
Undevelopable	5	6.58
Total	154	250.79

Source: Urban Enterprise, 2026

3.5. Broadhectare Vacant Land Supply

There is a cluster of broadhectare parcels in the north and north-west of the Hub with theoretical capacity and subdivision potential. These are shown in Figure 7 on page 16.

The gross land area of these parcels (in aggregate) is more than 70 ha, which accounts for more than two-thirds of the vacant land that is available at the Hub.

Several parcels within this area have an active planning status, whereby a planning permit is approved or under assessment. These include:

- 221 Glenstone Road: 4-lot subdivision is approved and is awaiting certificate of title;
- Lot 2 Glenstone Road: 4-lot subdivision application lodged and is under assessment; and
- 155 Cobbs Hill Road: 14-lot subdivision application lodged and is under assessment.

Given that these parcels have an active planning status, it is anticipated that the north and north-western part of the Hub will become the next development front; providing additional 'market ready' land once allotments are approved, subdivided, titled and developed.

It is important to note that planning approval does not guarantee development will occur, at least in a timely fashion. This creates some uncertainty around the ultimate timing of development and consumption.

Further, once development is committed, there is typically a 'lag' between land development and site specific business consumption. This is due to the time it takes to deliver relevant infrastructure and servicing works such as drainage and local roads.

Although the Hub has a notable supply of industrial zoned land, and there is some evidence of active planning activity across strategic broadhectare parcels, the practical and 'market ready' availability of land supply is anticipated to be lower for the following reasons:

1. Existing uses continue to prevail:

- Landowners of vacant sites with an inactive planning status do not intend to subdivide or sell their land;
- Landowners of vacant sites do not have the expertise or financial capacity to subdivide or develop the land.

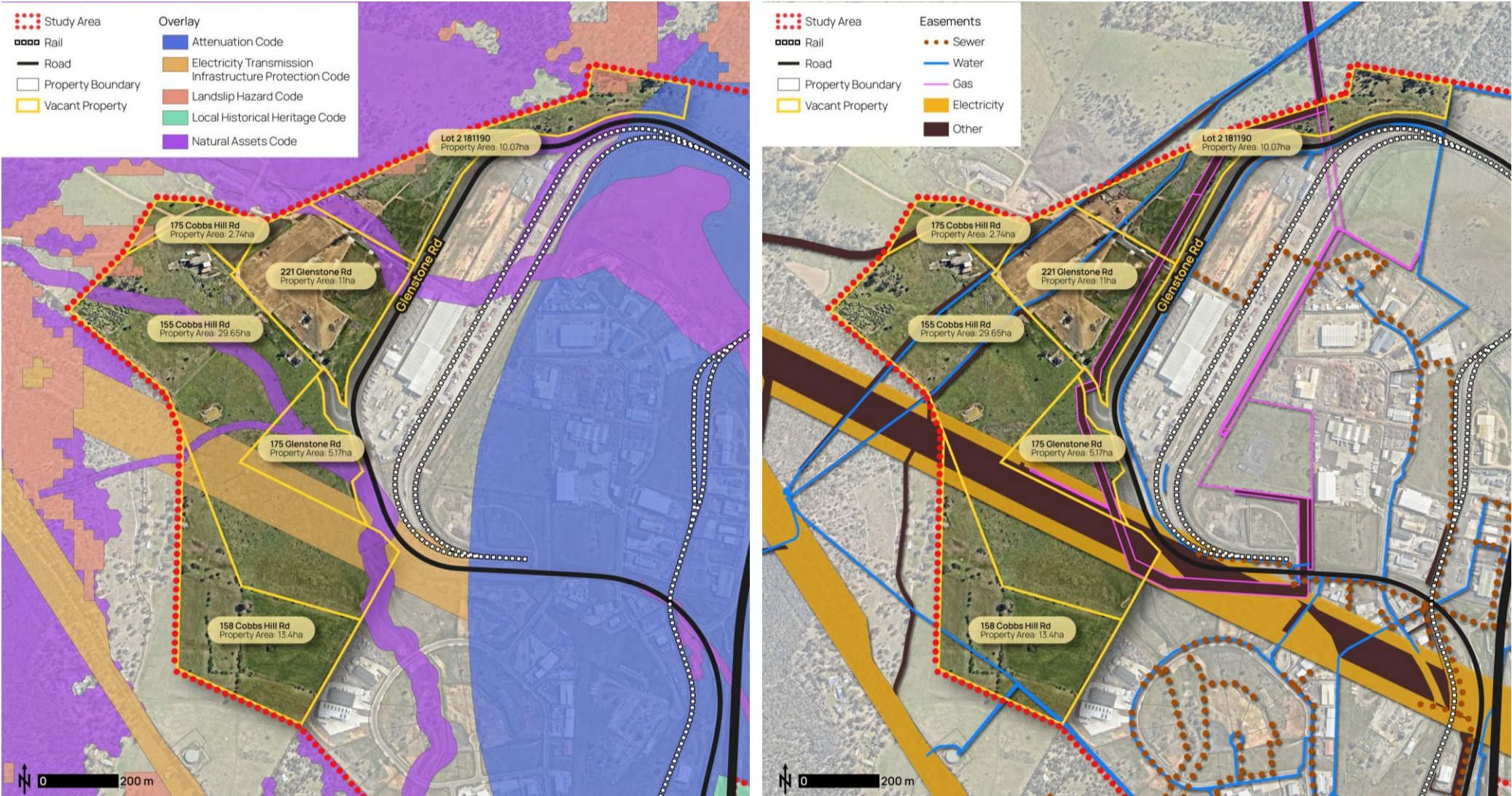
2. Physical constraints on the land limits the development potential and/or capacity (e.g. topography, vegetation); which in effect reduces the net developable area.

3. Servicing constraints on the land limits the development potential of the land; which in effect reduces the net developable area.

These factors are particularly relevant for the broadhectare parcels identified in Figure 7, which are undeveloped and have an inactive planning status.

Some of these parcels may have development challenges or limitations due to physical encumbrances or servicing constraints. For example, Figure 7 illustrates that there are existing easements on the land, several overlays apply such as natural assets and landslip, as well as this area being bushfire prone.

Figure 7: Vacant land supply, broadhectare land, Brighton Hub



Source: Urban Enterprise, 2026

3.6. Industrial Zoned Land Supply: Greater Hobart

Over the next 20 years, the SIS (2025) projects that Tasmania will require 394-468 hectares of additional industrial land.

While there is a forecast statewide surplus of between 389 and 462 hectares of industrial-zoned land over the next 20 years, there are significant fluctuations at a regional and local level. For example, in the Southern Region, Glenorchy (-55 ha), Hobart (-18 ha), Kingborough (-17.3 ha) and Sorell (-14.4 ha) face significant shortfalls, as shown in Figure 8.

Comparatively, Brighton and Clarence LGAs are well-supplied for industrial zoned land. Brighton Hub has the highest quantum of vacant General industrial zoned land in the southern region, and serves industrial demand from a broad regional catchment. This is especially the case for larger industrial users seeking larger land areas, separation and transport access.

The SIS (2025) estimates that Greater Hobart will generate demand for 204-242 ha of industrial land over a 20-year period, which equates to an average of 10.2-12.1 ha per annum (11.15 ha midpoint).

Given that Brighton has expressed advantages in its location, access and availability of zoned land, it is apparent that a notable proportion of demand for General Industrial zoned land that is generated within Greater Hobart and the southern region would flow to the Brighton Hub. This includes:

- Any potential demand generated from new business entrants seeking a presence in northern Hobart; and
- Existing larger industrial businesses seeking to re-locate to a new purpose-built location.

This is re-affirmed in the SIS (2025), which states that:

- Brighton performs a critical role in accommodating overflow demand from other constrained areas, including Greater Hobart; and
- Future industrial growth depends on LGAs such as Brighton and Clarence, and planning should ensure these LGAs remain capable of absorbing demand, through ongoing land release, servicing, and infrastructure coordination.

As a result, the Hub's role in serving industrial demand from Greater Hobart and the southern region (where land stocks are constrained) will strengthen. This could translate to higher consumption rates in the short to medium term.

Figure 8: Comparison of Vacant Land to 20-year demand (ha), LGA

LGA	Vacant land 2024 (Ha)	20-year demand (Ha)		Surplus/gap (Ha)	
		Low land to job ratio	High land to job ratio	Low land to job ratio	High land to job ratio
Brighton	93*	25	30	67.5	62.8
Central Highlands (Tas.)	0	3	3	-2.8	-3.3
Clarence	141*	85	101	55.8	40.0
Derwent Valley	1	6	7	-4.8	-5.9
Glamorgan-Spring Bay	7	4	5	2.8	2.1
Glenorchy	1	47	56	-46.3	-55.0
Hobart	0	15	18	-15.1	-17.9
Huon Valley	31	13	15	18.1	15.8
Kingborough	20	31	37	-11.4	-17.3
Sorell	0	12	15	-12.1	-14.4
Southern Midlands	0	4	5	-4.1	-4.9
Tasman	0	1	1	-0.9	-1.1
Greater Hobart	254	204	242	50	13
Southern Region	293	246	292	47	1

Source: SIS, 2025

Alternative Industrial Zoned

Figure 9 shows the location of General Industrial zoned land (dark purple) and Light Industrial zoned land (light purple) in the Brighton and Glenorchy LGAs in northern Hobart.

Brighton LGA

The Brighton Hub study area is the main source of General Industrial zoned land in the Brighton LGA.

The General Industrial zone extends to the west of the study area, west of the Highway and north of Cove Hill Road. There is some Light Industrial zoned land along Cove Hill Road in Bridgewater.

Based on a review of aerial imagery, there appears to be some vacant land within the Light Industrial zone, and General Industrial zone within Bridgewater in the Brighton LGA, but it is located outside of the study area.

In theory, Light Industrial zoned land could accommodate smaller lots and businesses that are more commensurate with serving population-led industrial demand from within a localised catchment. This would allow major broadhectare vacant sites in the study area to be reserved for larger industrial users that require more significant land areas, separation from sensitive interfaces, and good accessibility to allow large truck movements and manoeuvrability.

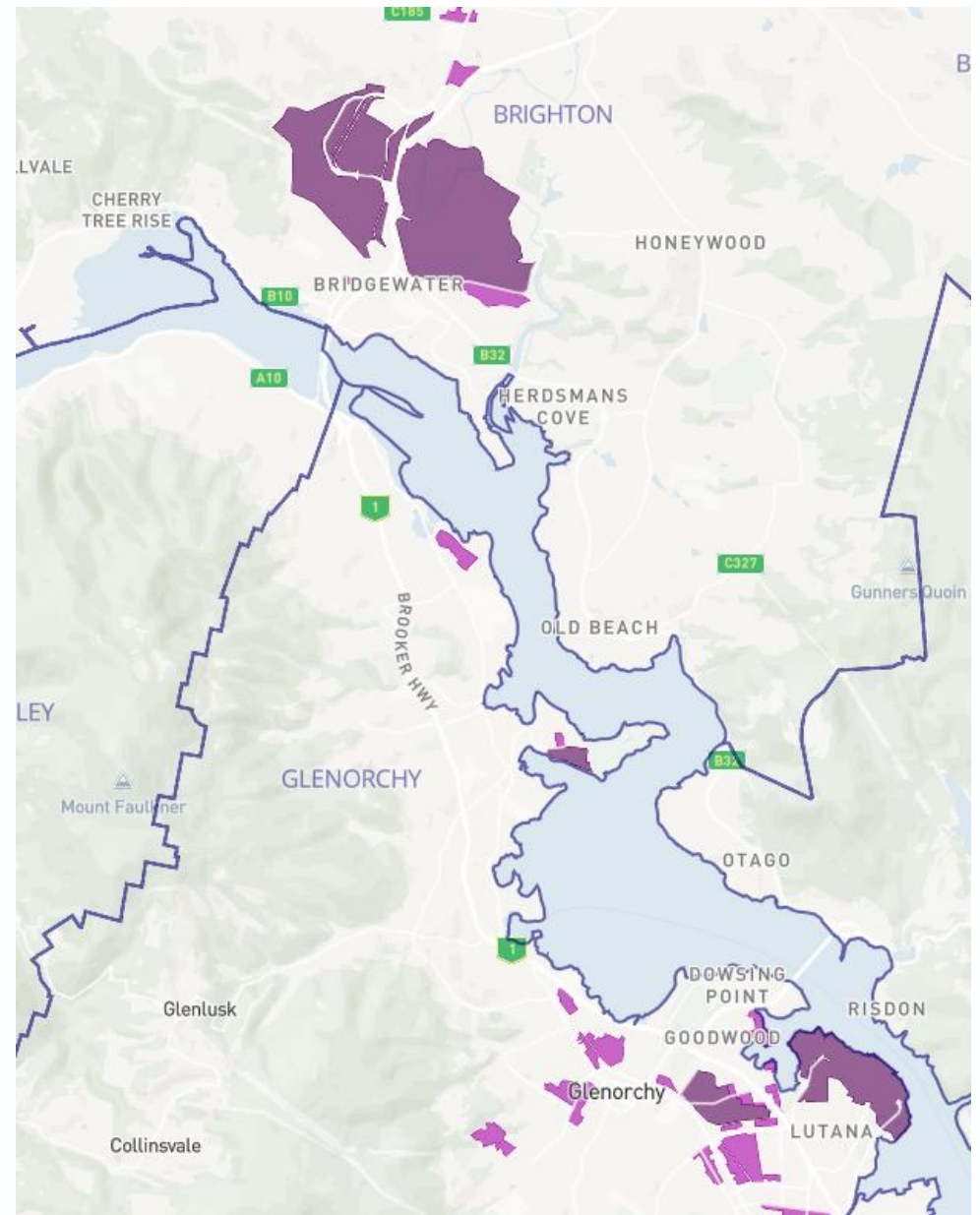
Glenorchy LGA

Further south, Glenorchy LGA has General Industrial zoned land; concentrated to existing precincts in Derwent Park; approximately 15 km south of the study area (see Figure 9).

Industrial precincts in Derwent Park appear highly occupied, and vacant sites are scarce. The capacity for Glenorchy to accommodate business demand for General Industrial zoned land is very limited, especially demand for greenfield or brownfield sites that can accommodate new, purpose-built industrial improvements.

Consultation with Glenorchy Council noted that industrial precincts such as Derwent Park are economically mature. However, new investment is still being accommodated; but is primarily service-oriented infill business demand located on single sites.

Figure 9: General Industrial and Light Industrial Zone



Source: Landchecker, 2026

3.7. Long Term Planning for Industrial Land Supply

The Tasmanian Planning Policies (TPPs) require councils to maintain a minimum 15-year supply of industrial land. This supply must be located within designated urban or settlement growth boundaries and be based on projected demand.

Although the study area is not a Local Government Area, it is a highly strategic and economically important industrial location in Brighton Hub and Greater Hobart. It is therefore prudent to take a long term view when planning for industrial land, especially if land supply becomes constrained and potential new land areas and locations need to be augmented through a rezoning process and Planning Scheme Amendment.

Planning and development timeframes vary between sites and locations, but the typical process from precinct planning and design, through to land development and capital construction follows the same broad sequence, and includes:

- **Phase 1:** Technical investigations and planning approval;
- **Phase 2:** Subdivision design and permit approval;
- **Phase 3:** Land development and lot construction; and
- **Phase 4:** Construction of capital improvements.

The typical timeframe to complete phase 1 through to phase 3 is 5 to 7 years. Therefore, 5 years represents the earliest time within which unzoned land can be made available for market consumption. In practice, it is common for one or more steps in this process to experience longer timeframes and delays, which can often extend the timeframe.

The overall length of this process indicates that precinct planning should commence well in advance of when the land needs to be available to the market to mitigate the risk of periods of low or constrained 'market ready' land supply.

It is important to take a long-term horizon in respect of land supply for the following reasons:

- The practical and 'market ready' availability of industrial land supply is often lower compared with theoretical land supply due to land fragmentation, physical encumbrances and servicing constraints.
- An adequate supply and availability of industrial land stocks encourages an industrial market that is flexible and responsive, so demand can be served as it arises.
- Having multiple 'market ready' subdivisions and development fronts encourages greater competition, and broadly accommodates the needs and preferences of different industrial market segments.
- If additional zoned land is required, rezoning processes are typically lengthy.
- Land that is rezoned may not be available to the market directly following a rezoning process due to several factors around developability and viability.

Figure 10: Planning & Development Process & Timing (indicative), Greenfield Industrial Land Development

Phase 1	• Identify Investigation Areas • Technical investigations • Exhibition & community engagement, submissions • Approval/amendment	3-4 years
Phase 2	• Subdivision planning & permit approvals • Detailed design • Certification of plans and statement of compliance	1-1.5 years
Phase 3	• Civil works and site preparation • Construction of lots • Sales and marketing titles lots	1-1.5 years
Phase 4	• Construct capital improvements • Finalisation of any civil works.	1-1.5 years

Consultation Findings: Land Supply

- The Hub is generally well supplied for zoned industrial land. However, there are several barriers to development that are impacting the developability of the land, and rate of development on the ground. These include:
 - Fragmented ownership;
 - Servicing requirements;
 - Physical constraints such as vegetation, bushfire and landslip hazard; and
 - Lengthy timeframes to obtain approvals.
- In particular, consultees expressed that lengthy planning approval timeframes and processes are stymying development, and leading to delayed or foregone business investment.
- The combination of barriers to development has weakened developer and market confidence due to increased risk and uncertainty.
- Although the Hub is theoretically well supplied for industrial zoned land, the Structure Plan could take a long term view when managing land supply. This will ensure that infrastructure delivery and land development can be logically sequenced, and potential areas for expansion can be investigated.
- Greater coordination between Government, referral agencies and landowners is required to facilitate development.

3.8. Key Points

- The study area has an adequate ‘theoretical’ supply of vacant industrial land (~108 ha). However, a significant proportion of supply is clustered around the north and north-west of the study area. This area is yet to undergo land development, and appears to require infrastructure and servicing investment.
- The practical and ‘market ready’ availability of industrial land supply is anticipated to be lower for the following reasons:
 - Existing uses continue to prevail;
 - Physical constraints; and/or
 - Servicing constraints.
- Vacant land supply that appears to be ‘market ready’ and practically available for development is primarily concentrated around Lukaarla Drive (30 lot subdivision), and the Greenbanks Road-Woodrieve Road sub-precinct.
- The economic importance of the Hub is further highlighted in the context of a very limited availability of vacant industrial zoned land stocks in alternative locations in Greater Hobart.
- The SIS anticipates that Brighton Hub will continue to serve overflow demand for industrial demand originating from Greater Hobart and the broader southern region.
- Any potential demand generated for larger lots with good separation and transport access would flow to the Brighton Hub. This includes:
 - New business entrants seeking a presence in northern Hobart;
 - Existing larger industrial businesses seeking to re-locate to a new purpose-built location.
- It is prudent to take a long-term view when planning for industrial land supply. Although current land stocks are sufficient, identification of candidate expansion areas for future investigation could be considered as part of the Structure Plan process.

4. Industrial Demand

4.1. Introduction

This section provides an assessment of industrial demand in the Brighton Hub to determine the profile and strength of demand, and to identify relevant trends that should be considered in the Structure Plan.

The assessment is informed by analysis of population and employment trends, industrial land consumption and development activity, as well as market insights gathered through consultation.

Industrial Related Sectors

The following industry sectors have been adopted for the purpose of assessing industrial land demand and are referred to as 'industrial-related sectors':

- Manufacturing,
- Transport, postal and warehousing,
- Construction,
- Wholesale trade,
- Electricity, gas, water & waste services,
- Agriculture, and
- Mining.

It should be noted that not all activities within these industries require or occupy industrial land, including in instances where businesses:

- Occupy commercial zoned land;
- Are home-based (e.g. construction trades); or
- Operate on farmland (e.g. agriculture).

The need for industrial land is generated either directly or indirectly from industry sectors and sub-sectors:

- **Directly** - traditional industrial users that require industrial zoned land to establish a business premises and operate. Examples include manufacturing, warehousing, transport, distribution and logistics.
- **Indirectly** – supply-chain sectors that require industrial zoned land to support and service industries that do not typically occupy industrial zoned land such as agriculture, horticulture, aquaculture, mining and energy.

4.3. Macroeconomic Conditions

There are several tailwinds that are influencing the southern region and Tasmania's economy and industrial land market:

- **The growing demand for food and fibre in Tasmania and Australia** is flowing through to demand for primary production, food processing, and export-oriented enablers such as freight, transport and warehousing.
- **The transition to renewable energy production and growing investment in wind, solar and battery storage projects in Tasmania** is creating construction-related demand for civil construction services, trades, machinery operators, equipment and parts manufacturing and servicing. Longer-term operations and maintenance activities are also anticipated to grow.
- **Regional population and housing growth** is driving ongoing but cyclical demand for residential and commercial construction services, building materials and trade supplies.
- **Logistics and warehousing growth linked to e-commerce** is increasing the need for regional distribution capability.

Table 6: Implications of macroeconomic trends, Tasmania

Macroeconomic Trend		Direction	Demand side impact	Scale of Impact	Horizon (cyclical or structural)	Implication for Industrial Land
	Agriculture & Aquaculture (growing demand for food and fibre)	Tailwind	- Food processing. - Warehousing, cold storage and packaging. - Freight and transport. - Ag equipment, tech servicing. - Rural supplies and services.	High	Long (structural & cyclical)	- Protect and support industrial land that is freight-accessible; - Ensure wastewater and power capacity.
	Renewable Energy Transition & Project Investment	Tailwind	- Civil construction services and trades. - Machinery operators and servicing. - Equipment and parts manufacturing and servicing. - Fabrication. - Extractive industries.	Moderate	Medium- Long (structural)	- Ensure supply of large lot industrial land to capitalise on strategic demand as it arises; - Plan for power-intensive uses.
	Green & Circular Economy	Tailwind	- Recycling and waste transfer. - Materials recovery and reuse. - Organics processing.	Moderate	Medium-Long (structural)	- Ensure supply of large lot industrial land to capitalise on strategic demand as it arises; - Preserve buffer-compatible land; - Avoid residential encroachment.
	Growth in Online Retail & Logistics	Tailwind	- Regional warehousing. - Courier depots. - Freight and transport.	Moderate	Long-term structural	- Ensure supply of large lot industrial land to capitalise on strategic demand as it arises; - Encourage flexible subdivision and strata industrial formats
	Regional Population & Housing Growth	Tailwind	- Construction trades services and supplies. - Building materials. - Automotive servicing and repair. - Light manufacturing. - Atypical industrial uses (gyms, fitness, play centres)	High	Ongoing (cyclical)	Ensure pipeline of smaller industrial lots and multi-unit development.

Source: Urban Enterprise, 2026

4.4. Growth Context

Population

Figure 11 and Table 7 present the historical and projected population growth for Brighton, Southern Tasmania and Tasmania.

The following points are relevant:

- Between 2003 and 2023, Brighton's estimated population increased from around 13,150 to 20,000 (+343 per annum), increasing at an average rate of 2.1% per annum.
- The rate of population growth in Brighton across this period in Brighton significantly outpaced Southern Tasmania (1.2% per annum) and Tasmania (0.9% per annum).
- Brighton's population represents approximately 7% of the broader Southern Tasmania region's population.

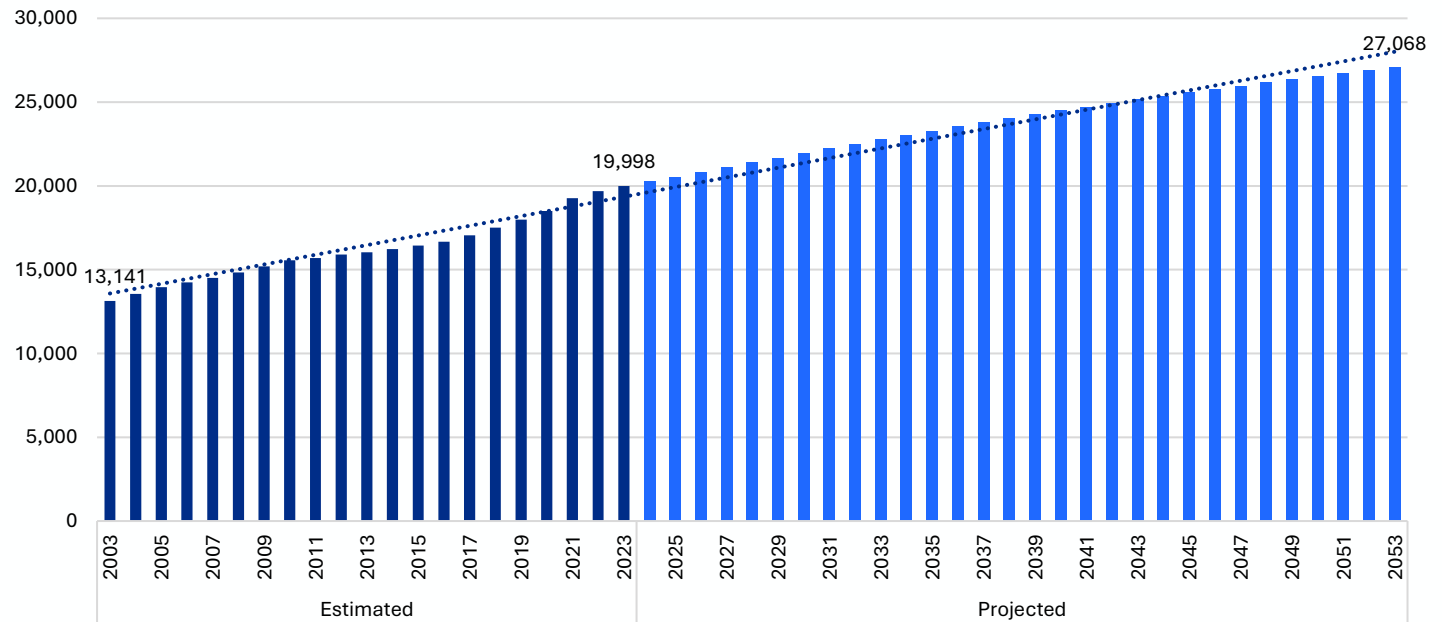
The Tasmanian State Government's official population projections provide 30-year projections for the period 2023 to 2053.

According to these projections, Brighton's population is projected to increase by approximately 7,070 residents to reach approximately 27,000 in 2053. This represents an average of 236 additional residents per annum, at an average annual rate of 1.0%, which is noticeably lower compared with historic trends.

The lower projected growth rate is reflected across both Southern Tasmania (0.6% per annum) and Tasmania (0.5% per annum).

Overall, growth across Brighton, Southern Tasmania and Tasmania is relatively favourable, which will strengthen demand for industrial land to support future population and economic growth.

Figure 11: Historic & Projected Population Growth, Brighton LGA, 2001 - 2053



Source: Department of Treasury and Finance, Population Projections for Tasmania and Local Government Areas, 2024

Table 7: Historic & Projected Population Growth, Brighton, Southern Tas, Tasmania, 2003 - 2053

				Historic Growth (2003 – 2023)			Projected Growth (2023 – 2053)		
	2003	2023	2053	#	AAG	AAGR	#	AAG	AAGR
Brighton	13,141	19,998	27,068	+6,857	+343	2.1%	+7,070	+236	1.0%
Southern Tasmania	233,975	297,472	351,021	+63,497	+3,175	1.2%	+53,549	+1,785	0.6%
Tasmania	478,534	573,156	641,045	+94,622	+4,731	0.9%	+67,889	+2,263	0.4%

Source: Department of Treasury and Finance, Population Projections for Tasmania and Local Government Areas, 2024

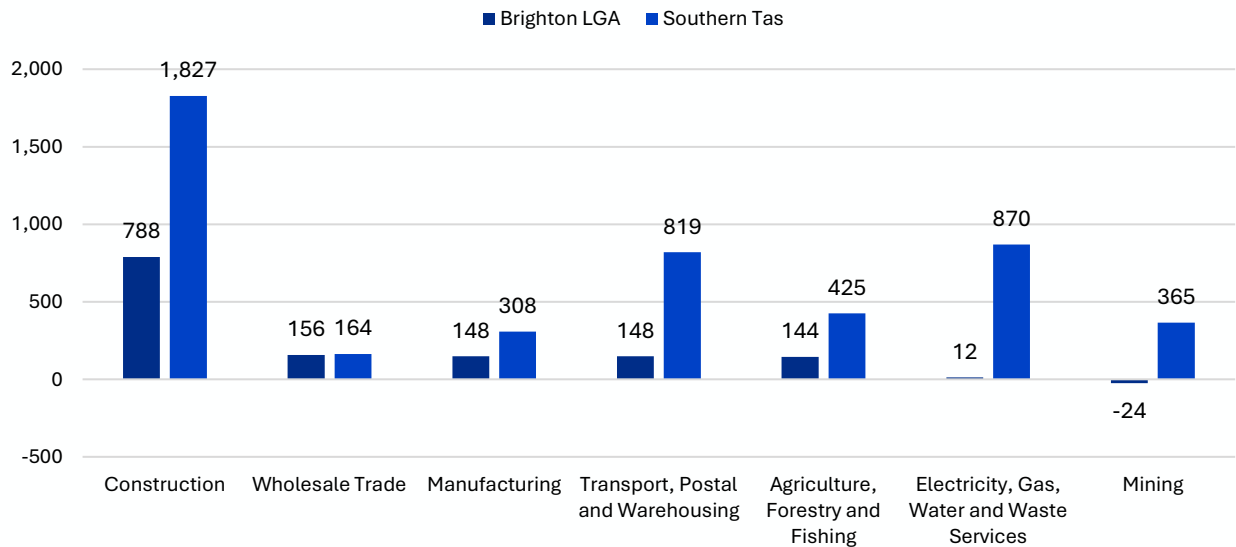
Employment & Business

As at 2024, there were approximately 5,700 jobs in Brighton LGA and more than 155,000 in Southern Tasmania.
Figure 12 presents the change in local employment industrial related sectors between 2019 and 2024.

Key observations:

- Brighton LGA recorded an increase of 1,963 local jobs between 2019 and 2024, with around 70% of this growth occurring in industrial-related sectors (+1,372 jobs). In contrast, industrial industries accounted for just 24% of total employment growth across the Southern Tasmania region over the same period.
- Construction was the largest growth sector (+788 jobs), followed by Retail Trade (+229 jobs), Wholesale Trade (+156 jobs), Manufacturing (+148 jobs), and Transport, Postal and Warehousing (+148 jobs).
- Brighton accounted for around 30% of total industrial employment growth across the Southern Tasmania region. Growth was particularly concentrated in Wholesale Trade, Manufacturing and Construction, which represented 95%, 48% and 43% respectively of the region’s total employment growth in these sectors.
- Between 2019 and 2024, Brighton’s business base grew by 129 businesses, with 43% of this growth coming from industrial-related industries. By comparison, industrial-related industries accounted for 33% of business growth across Southern Tasmania.
- Industrial-related businesses in Brighton remained relatively stable, with the Construction sector recording the largest increase (+49 businesses), reflecting the broader growth trend across Southern Tasmania.

Figure 12: Employment Change, Industrial-Related Sectors, Brighton LGA & Southern Tasmania, 2019-24



Source: State Growth Tasmania Economy Id, 2023/24.

Industrial Employment Forecasts

The Tasmania State Industrial Strategy provides LGA-level industrial employment forecasts. Brighton LGA is projected to add approximately 1,062 industrial jobs over the next 20 years. Over the same period, the Southern Tasmania region is forecast to add 10,386 industrial jobs, representing over 60% of Tasmania’s total projected increase of 16,632 industrial jobs.

4.5. Subdivision & Development Activity

The majority of occupied lots at the Hub were developed and consumed prior to 2015.

More recent subdivision and consumption activity has been concentrated in the southern and western parts of the Hub, most notably west of the Midland Highway and south of Glenstone Road.

The two more recent active subdivision areas are:

- Lukaarlia Drive (30 lots); and
- Greenbanks Road-Woodrieve Road sub-precinct.

Lukaarlia Drive

A 30-lot subdivision around Lukaarlia Drive is being developed across three stages.

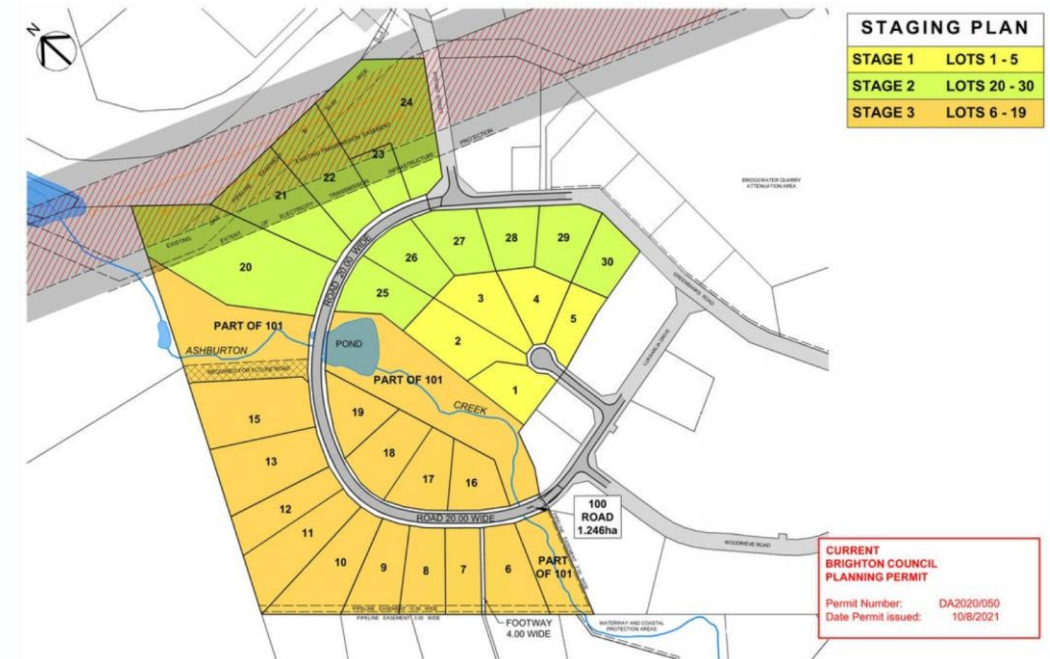
Internally, lots along Lukaarlia Drive and around Bevel Close are generally less than 0.5 hectares in area, while land to the north and west of Lukaarlia Drive comprises moderate sized lots, typically between 1–2 hectares.

According to the developer, 23 out of the 30 lots sold in the first three years. To date, three lots (15, 15A, and 17 Lukaarlia Drive) have been consumed, developed and are occupied. These lots are characterised by large-format industrial buildings with substantial hardstand areas and access suitable for heavy vehicles.

Five lots have been re-advertised for sale. Three lots are around 0.5 ha in area, and are advertised for in the order of \$750,000–\$950,000. Advertised prices are unavailable for the larger lots, which are 1 ha and 1.98 hectares respectively.

The remaining sites that have sold remain vacant, and are yet to be occupied by a capital improvement.

Figure 13: Subdivision layout and staging plan, Lukaarlia Drive



Source: Real Commercial (accessed March 2026)

Table 8: Advertised Listings, Lukaarlia Drive, March 2026

Address	Property Type	Advertised Price	Land and/or building area
14 Greenbanks Road, Bridgewater	Vacant Development Site	Offers over \$850,000	Land: 0.4ha
16 Greenbanks Road, Bridgewater	Vacant Development Site	Unavailable	Land: 1.03ha
33 Lukaarlia Drive, Bridgewater	Vacant Development Site	Unavailable	Land: 1.98ha
18 Lukaarlia Drive, Bridgewater	Vacant Development Site	Offers over \$725,000	Land: 0.4ha
13 Lukaarlia Drive, Bridgewater	Vacant Development Site	Offers over \$950,000	Land: 0.53ha

Source: Real Commercial (accessed March 2026)

Greenbanks Road-Woodrieve Road Sub-Precinct

This area encompasses land along Greenbanks Road and Woodrieve Road directly south of Lukaarlia Drive. A higher level of consumption activity is evident, with a mix of vacant lots and turnkey product.

The lot profile within this area is smaller, and are generally below 0.5 hectares. There are several lots with an area of 0.5–1 hectare, and a limited number of moderate sized lots between 1–2 hectares.

The lot profile and configuration has led to a mix of small to mid-format industrial users, including small-scale warehouse and factoryettes (250–500 sqm).

The built form profile is characterised by standalone warehouses, trade-based premises and multi-unit industrial developments.

The business profile primarily consists of construction, transport and distribution, trade services and light industrial activities.

Notably, this area is located closer to the residential interface and adjoins a sports oval, which is likely to have influenced the nature of development over time. In this context, there is a reasonable expectation that smaller lot sizes and less intensive industrial uses will continue to emerge in the southern portion of the precinct.

There are several industrial properties currently advertised for sale (see Table 9), including vacant development sites of varying sizes, established mid-sized industrial buildings, and newly developed turnkey factoryette units (see Figure 14).

Illustrating the trend toward smaller lots, a 2.04 ha site at 73 Greenbanks Road, at the southern extent of the Brighton Hub, was sold in 2024 with approval for subdivision into nine smaller lots. There is currently no evidence of development on the site, and it is unclear whether the approved subdivision will proceed.

Figure 14: Recent Development Example, 67 Greenbanks Road



Source: Real Commercial (accessed March 2026)

Table 9: Advertised Listings, Greenbanks Road-Woodrieve Road Sub-Precinct

Address	Property Type	Price	Land and/or building area
4 Woodrieve Road, Bridgewater	Vacant Development Site	Offers over \$2,200,000	Land: 1.28ha
29 Greenbanks Road, Bridgewater	Vacant Development Site	Offers over \$1,900,000	Land: 1.14ha
17 Woodrieve Road, Bridgewater	Vacant Development Site	\$440,000	Land: 0.18ha
3 Lukaarlia Drive, Bridgewater	Warehouse, Factory & Industrial	Contact Agent	Land: 0.35ha Floor area: 700sqm
11, 12 & 13, 67 Greenbanks Road, Bridgewater	Warehouse, Factory & Industrial	Offers over \$2,550,000	Land: 0.42ha Floor area: 785sqm
7/67 Greenbanks Road, Bridgewater	Warehouse, Factory & Industrial	Offers over \$1,150,000	Land: 0.42ha Floor area: 350sqm
9 & 10, 67 Greenbanks Road, Bridgewater	Warehouse, Factory & Industrial	Offers over \$1,750,000	Land: 0.42ha Floor area: 525sqm
4/67 Greenbanks Road, Bridgewater	Warehouse, Factory & Industrial	Offers over \$850,000	Land: 0.42ha Floor area: 250sqm

Source: Real Commercial (accessed March 2026)

4.6. Industrial Land Consumption

Industrial land consumption is an important indicator of demand, and can be defined as the amount of land that changes from vacant to occupied (having a clear use or structure).

It is acknowledged that consumption can only occur where 'market ready' land is available.

Methodology

To assess and estimate historical consumption of industrial land in the study area, the following methodology was adopted:

- Assess consumption over a 10-year period between 2015 and 2025 (calendar year)
- Review annual satellite aerial imagery across industrial zoned areas in the study area over the 10-year period to identify the quantum of land that has been consumed.
- Using GIS, calculate the quantum of land (ha) that has been consumed over the 10-year period.

To address fluctuations in annual consumption rates, aggregate consumption has been mapped across two 5-year periods: 2015 to 2020 and 2021 to 2025.

Results

In the 10-year period between 2015 and 2025, a total of 12.8 ha of land was consumed across 17 parcels, at an average annual rate of 1.28 ha per annum.

Average annual consumption rates averaged approximately 0.86 ha per annum between 2015 and 2020. In the post pandemic period, average consumption rates increased significantly to 1.7 ha per annum. This was largely led by 2023, which recorded 6.4 ha of consumed land across 7 lots.

Figure 15 (overleaf) shows the lots that have been consumed over the 10-year period.

In terms of location, consumption has been relatively dispersed. More recently, consumption has been concentrated to Lukaarlia Drive, Greenbanks Road and Woodrieve Road.

Lots that have been consumed are generally small to moderate, and range between 0.3 and 1.5 ha.

Site specific examples of consumption activity are provided on Page 28.

Table 10: Industrial Land Consumption Summary, Study Area, 2015-25

Consumption	Lots	Area (ha)	Ave p.a.
2015 - 2020	6	4.3	0.86 ha
2021 - 2025	11	8.51	1.7 ha
Total	17	12.81	1.28 ha

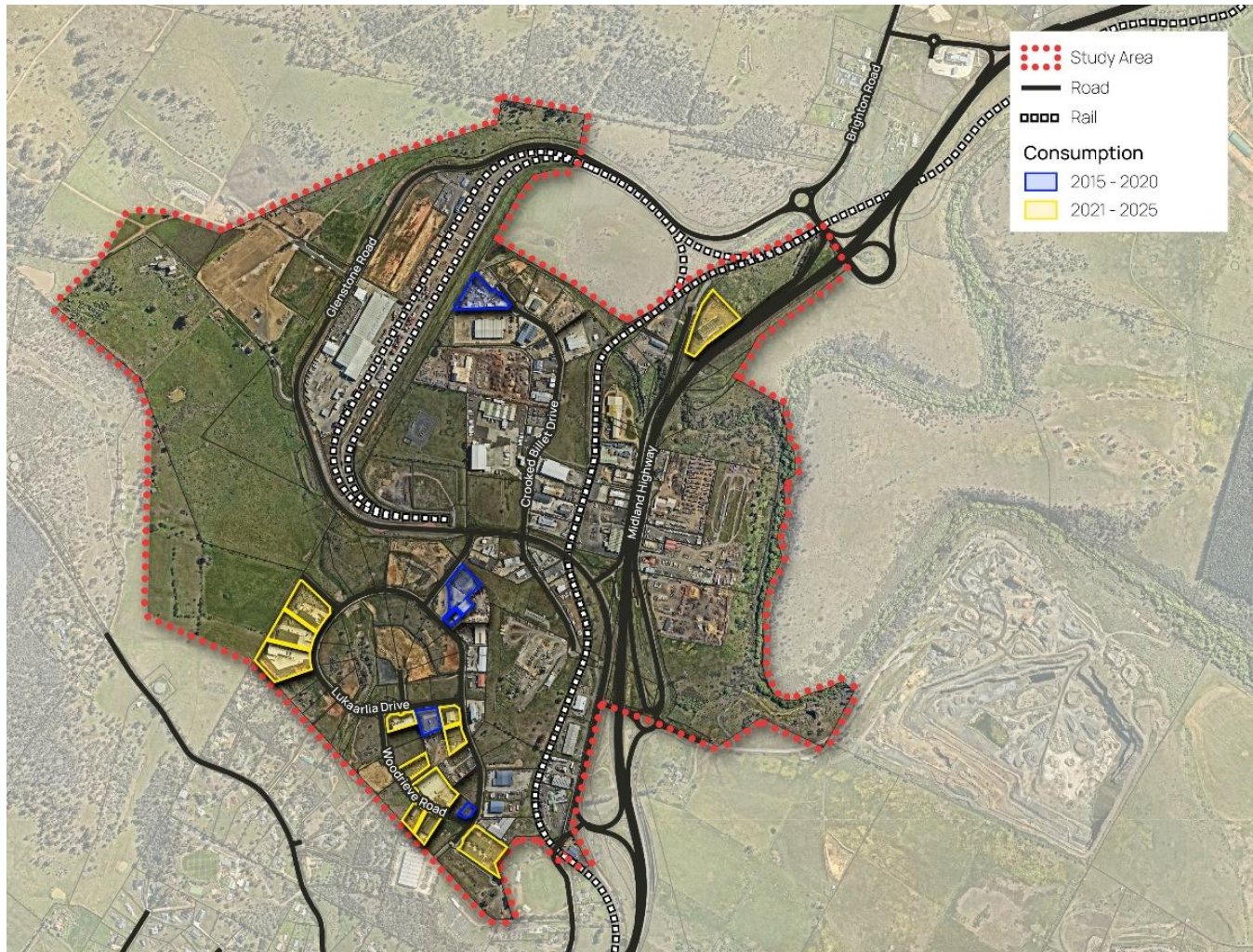
Source: Urban Enterprise, 2026

Table 11: Industrial Land Consumption by Year, Study Area,

	Lots	Area (ha)
2015	1	0.17
2016	0	0
2017	0	0
2018	4	3.97
2019	1	0.16
2020	0	0
2021	1	0.41
2022	2	1.34
2023	7	6.4
2024	0	0
2025	1	0.36
Total	17	12.81

Source: Urban Enterprise, 2026

Figure 15: Land Consumption, Study Area, 2015-2025



Source: Urban Enterprise, 2026

According to the SIS (2025), over the next 20 years, Tasmania is projected to require between 394 and 468 hectares of additional industrial land. The highest growth is expected in the Southern Region, particularly within Greater Hobart, which accounts for 242 hectares of land demand under the high growth scenario. (p. 7)

Examples of Consumption & Development Activity

Surdex Steel

- Address: 15 Lukaarlia Drive, Bridgewater
- Site size: 1.43 ha
- Construction completion: 2025
- Built form: 2,500sqm factory and over 3,000sqm concrete hardstand.
- Business description: steel distribution and processing company supplying a wide range of products for industries including construction, transport, agriculture, mining, and defence.
- Surdex Steel Hobart services Hobart, Launceston, Devonport and Burnie.



Sigma Healthcare

- Address: 13-15 Woodrieve Road, Bridgewater
- Site size: 0.98 ha
- Construction completion: 2024
- Built form: 4,000 sqm purpose-built distribution centre.
- Business Description: Sigma Healthcare is a major Australian pharmaceutical wholesaler, distributor and retail pharmacy network operator, and plays an important role in the Australian healthcare supply chain. The site is Sigma Healthcare's only distribution centre in Tasmania and will allow Sigma to "supply over 7 million units of essential medicines and related products to pharmacies across Tasmania every year".



Deman Engineering

- Address: 22 Greenbanks Road, Bridgewater
- Site size: 0.43 ha
- Construction completion: 2024
- Built form: 1,500sqm factory and associated hardstand.
- Business description: A small-scale diesel engineering and manufacturing business, specialising in diesel engine sales, service, spare parts and custom engineering, particularly for marine, mining and industrial applications.



Multi-Business Complex

- Address: 12 Woodrieve Road, Bridgewater
- Site size: 0.46 ha
- Construction completion: 2024
- Built form: 1,460sqm factory and associated hardstand. Total of five strata units, four are approximately 250 Sqm, the last is approximately 460sqm. All 5 have been sold.
- Business mix:
 - Tas Underground Asset Locators
 - Greenview Tilt Tray Specialists
 - Survey Plus Tas
 - Angelique's School of Dance



Source: Urban Enterprise, 2026

4.7. Adequacy of Supply

To assess the adequacy of industrial land supply in the Brighton Hub study area, three scenarios for future consumption have been assessed and applied to the vacant land supply identified to estimate the number of years of zoned land supply that is left in Brighton Hub.

To provide an estimate for net land area and for the purpose of this analysis, 30% of land has been deducted from the gross vacant land area (~108 ha) to allow for potential encumbrances, and the provision of infrastructure such as roads and drainage. This is a preliminary assumption that is likely to change once detailed subdivision planning on vacant broadhectare parcels occurs.

To estimate the years of industrial land supply remaining within the study area, a range of scenarios for consumption have been formulated and adopted:

- **Scenario 1: Baseline (1.7 ha p.a.)**
This scenario assumes that the average annual consumption rate within the Hub over the 5-year period between 2021 and 2025 will continue. This equates to 15% of Greater Hobart's future industrial land needs (11.15 ha p.a.) as identified in the SIS (2025).
- **Scenario 2: Moderate (2.8 ha p.a.)**
This scenario assumes that 25% of Greater Hobart's future industrial land needs (11.15 ha p.a.) as identified in the SIS (2025) is directed and absorbed by Brighton Hub.
- **Scenario 3: High (5.6 ha p.a.)**
This scenario assumes that 50% of Greater Hobart's future industrial land needs (11.15 ha p.a.) as identified in the SIS (2025) is directed and absorbed by Brighton Hub.

Table 12: Adequacy of Industrial Land Supply, scenarios, Brighton Hub

Scenario	1	2	3
Vacant Industrial Land Supply (ha)	75.9 (net, ha)*		
Consumption rate (ave. annual)	1.7	2.8	5.6
Years supply (estimate, ha)	63.8	38.9	19.4

Source: Urban Enterprise, 2026

* 30% deducted from 108 ha to allow for encumbrances and infrastructure.

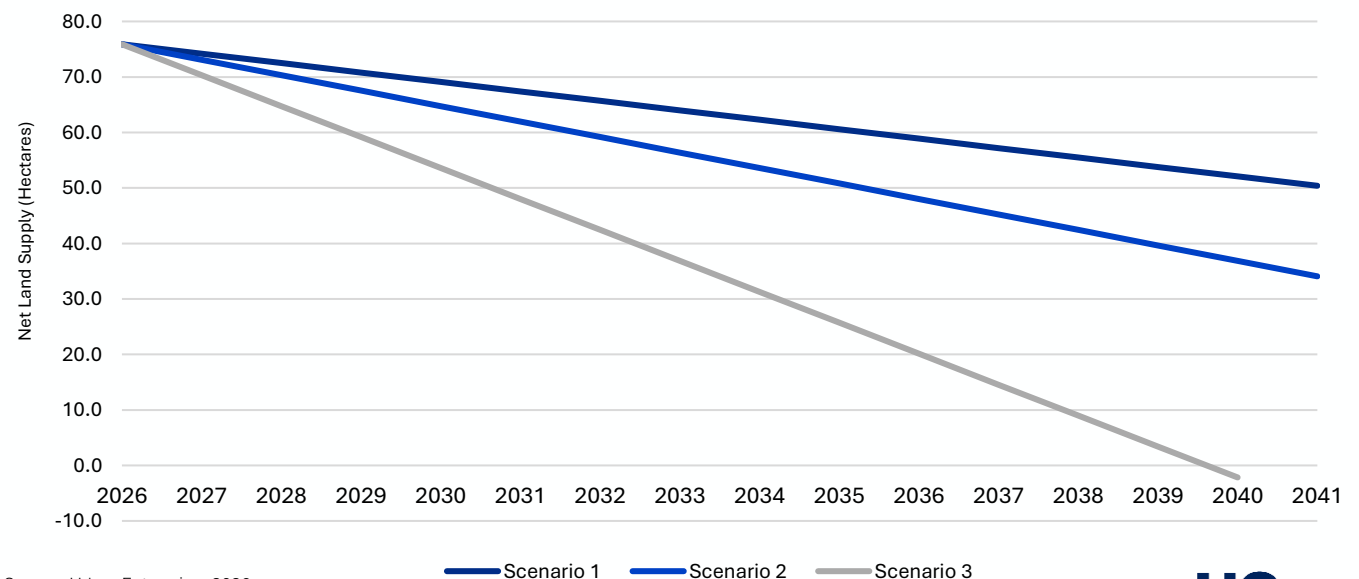
Based on the consumption scenarios, the study area is estimated to have between 19 and 63 years of vacant zoned land supply that is theoretically available.

Given that the SIS (2025) anticipates a notable proportion of Greater Hobart's industrial demand to flow to Brighton and Clarence Local Government Areas, it is likely that consumption rates will increase beyond historical levels (i.e. scenario 1). For this reason, scenario 2 or 3 are more likely to materialise. Based on these scenarios, the study area has an estimated 19 to 38 years of vacant land supply left.

It is important to note, however, that these are estimates only. The rate of actual consumption and development activity should be regularly monitored and updated over time to ensure land supply figures are up to date.

As previously stated, the Tasmanian Planning Policies (TPPs) require councils to maintain a minimum 15-year supply of industrial land. Applying this requirement to the study area, there is an adequate theoretical supply of zoned industrial land, and additional zoned land, or expansion of the existing precinct is not required at this point. However, noting that the developability of the cluster of vacant land in the north of the study area is unknown. If there are development constraints that emerge, the net developable area may reduce, meaning that the years supply would also decrease.

Figure 16: Years of supply remaining, demand scenarios, Study Area



Source: Urban Enterprise, 2026

Consultation Findings:

Demand

- Consultees were of the view that market demand has been consistent at the Hub, but development has been modest. This is due to a combination of factors such as:
 - Vacant lots being purchased but construction not commencing;
 - Challenging and slow approvals processes and timeframes;
 - Development barriers and constraint such as infrastructure and servicing requirements.
- Although construction activity has been slow, the subdivision at Lukaarlia Drive attracted a high level of interest and sales within a 3-year period.
- Some lots have been consumed and constructed; however several sites have been re-advertised for sale. This could in part be driven by land value appreciation and vendors seeking to capitalise on land value appreciation (i.e. windfall).
- Consultees noted that the Hub is well placed to accommodate transport-oriented businesses, despite take-up being relatively modest for larger lots (2+ ha).
- Contemporary high-value industrial uses could also be explored, such as advanced manufacturing and data centres if servicing capacity can facilitate these uses.
- Consultees noted that the Hub is well placed to serve demand from:
 - Businesses located on mainland Australia seeking a presence in Tasmania;
 - Existing Tasmanian businesses seeking to relocate to a new, purpose-built site.
- The Hub is well positioned for its next phase of development and consumption, but planning authorities and referral agencies need to coordinate with landowners and developers to facilitate subdivision activity and 'market ready' lots.

4.8. Key Points

- Industrial-related sectors in Brighton are the main drivers of the local economy. In aggregate, these sectors generate 83% of output, 85% of export value and 72% of value add.
- Employment growth across industrial-related sectors in Southern Tasmania is evident. Brighton LGA accounted for around 30% of total industrial employment growth in the southern region.
- Macroeconomic conditions indicate that industrial land demand should remain positive over the medium to long term at the Brighton Hub, especially for activities that support the sectors of agriculture and aquaculture, transport and logistics, renewable energy and the circular economy, resources, e-commerce, construction and civil services.
- Modest population growth is projected in Southern Tasmania and the rest of Tasmania, which is anticipated to buoy demand for industrial sectors that directly support population growth.
- According to the SIS (2025), over the next 20 years, Tasmania is projected to require between 394 and 468 hectares of additional industrial land. The highest growth is expected in the Southern Region, particularly within Greater Hobart, which accounts for 242 hectares of land demand under the high growth scenario.
- Given that the majority of vacant industrial zoned land in the southern region is concentrated to the Brighton and Clarence LGAs, a notable proportion of this demand is likely to flow to these areas, including the Hub.
- Consumption activity in Brighton Hub has been relatively subdued in recent years. However, consumption can only occur where 'market ready' land is available.
- Consumption and development activity has been concentrated to recent subdivision activity in the south and south-west of the study area. Consumption activity has been relatively modest at around 1.7 ha per annum between 2021 and 2025.
- Consumption has occurred primarily across small and moderate sized lots; between 0.3 to 1.5 ha in area. The business profile of new occupants includes a mix of construction and civil services, manufacturing, engineering, logistics and distribution.
- The subdivision around Lukaarlia Drive (30 lots) is the current active development front. The subdivision generally includes lots ranging from approximately 0.3 ha and 1 ha. The subdivision is close to being sold out, but many sites remain vacant and are yet to be constructed/occupied.
- There has been very limited consumption of lots that are 2+ hectares. However, noting that vacant lots of this scale that are 'market ready' are practically unavailable, and therefore relatively untested.
- Based on the most likely consumption scenarios, the study area has an estimated 19 to 38 years of vacant land supply left. At present, there is an adequate theoretical supply of zoned industrial land, and additional zoned land, or expansion of the existing precinct is not required at this point.
- Given the strategic and economic importance of Brighton Hub and the lengthy planning timeframes associated with augmenting new zoned land supply, it is important to maintain a 15-year rolling supply of industrial zoned land supply.

5. Findings & Recommendations

Industrial land supply and demand findings and recommendations are summarised below. These should be considered in the preparation of the Structure Plan for the Brighton Hub study area.

Strategic Role and Vision

- There is strong strategic support for Brighton's designation and role as a Regionally Significant Industrial Precinct to be maintained and enhanced.
- The location, transport and infrastructure attributes of the Hub are highly strategic and commensurate with its role as a transport and export-oriented precinct.
- The Hub is well positioned to accommodate regional, state and national scale export-oriented businesses that can leverage the advantageous location and existing infrastructure. Priority industries include transport, logistics, distribution, freight, construction, warehousing, manufacturing and the circular economy.
- The SIS acknowledges the regional and economic importance of the Hub.
- The SIS prioritises the reservation of undeveloped broadhectare vacant land for large lot sizes (2-5+ ha) that can accommodate industrial users with requirements such as generous land areas, access, buffers and separation, and proximity to transport and freight networks.

Land Supply & Capacity

- Currently, the study area has an adequate 'theoretical' supply of vacant industrial land (~108 ha). However, the 'market ready' availability of industrial land supply is anticipated to be lower due to ownership fragmentation, development inactivity, physical encumbrances and servicing constraints; all of which limit the developability of the land, and add to the uncertainty around the timing of market augmentation.
- There is a cluster of broadhectare parcels in the north and north-west of the Hub with theoretical capacity and subdivision potential. The gross land area of these parcels (in aggregate) is 70+ ha; accounting for more than two-thirds of the vacant land that is available at the Hub.

This area presents the next major development front of the Hub.

- Moderate to larger industrial allotments (1-5+ ha) should be considered for undeveloped vacant land in the north and north-west for the following reasons:
 - Moderate to larger lots (1-2+ ha) that are vacant, serviced and 'market ready' are very limited;
 - There are practically no alternative locations in northern Hobart for larger industrial users to locate;
 - Some smaller sized allotments are currently available around Lukaarlia Drive, Woodrrieve Road and Greenbanks Road; and
 - Larger lots align with the Hub's designation as a RSIP, and accommodate industrial users requiring larger land areas, good separation and buffers, transport access and manoeuvrability
 - Larger users could utilise and leverage the committed public investment in infrastructure (e.g. intermodal freight terminal, road network).
- Moderate sized lots (1-2 ha) should be considered north of Lukaarlia Drive as a transition area, with larger lots (2-5+ ha) considered for the balance of the northern area.
- Consider consolidating smaller lots (<0.5 ha) in the south west corner of the Hub (south of Lukaarlia Drive) to:
 - Provide a buffer to the interface with residential and community/recreation areas;
 - Consolidate and cluster smaller lots and lighter industrial users; and
 - Reflect the current development pattern and typologies in this area.

Demand & Long Term Land Supply Planning

- Industrial land supply and demand indicators suggests that industrial land demand should remain positive over the medium to long term at the Brighton Hub, especially for activities that support the sectors of agriculture and aquaculture, transport and logistics, manufacturing, renewable energy and the circular economy, resources, e-commerce, construction and civil services.
- According to the SIS (2025), over the next 20 years, Tasmania is projected to require between 394 and 468 hectares of additional industrial land. The highest growth is expected in the Southern Region, particularly within Greater Hobart, which accounts for 242 hectares of land demand.
- The SIS anticipates that the Hub's role in serving industrial demand from Greater Hobart and the southern region (where land stocks are constrained) will strengthen. This is likely to translate to higher consumption rates in the short to medium term.
- Based on the most likely consumption scenarios, the study area has an estimated 19 to 38 years of vacant land supply left. At present, there is an adequate theoretical supply of zoned industrial land.
- Additional zoned land, or expansion of the existing precinct is not required at this point. However, noting that the developability of the cluster of vacant land in the north of the study area is not fully known. If there are development constraints that emerge, the net developable area may reduce, meaning that the years of supply remaining would also decrease.

- The Structure Plan should adopt a long-term view when planning for industrial land supply. Given the strategic and economic importance of Brighton Hub and the lengthy planning timeframes associated with augmenting new zoned land supply, it is recommended that Council seeks to maintain a 15-year rolling supply of industrial zoned land supply in the study area.
- Additional zoned land, or expansion of the existing precinct is not required at this point, given that there is an estimated 18-38 years remaining. However, land supply and consumption activity should be regularly monitored. If development constraints emerge for strategic broadhectare parcels, or the rate of consumption increases, the years supply remaining may reduce.

When vacant zoned land supply decreases to 15 years, more detailed planning for expansion areas should commence.
- From a purely development pattern perspective, the most appropriate area to investigate for future expansion is north and west of Glenstone Drive. This would provide a natural extension of the existing GIZ.
- The location of investigation areas requires careful consideration of land ownership, land capability, infrastructure and servicing capacity, access and developability.

Appendices

Appendix A Acronyms & Glossary of Terms

Appendix A: Acronyms & Glossary of Terms

Acronym	Expanded
AAG	Average Annual Growth
AAGR	Annual Average Growth Rate
ABS	Australian Bureau of Statistics
LGA	Local Government Area
SA	Statistical Area
SIS	State Industrial Strategy

Term	Definition
Consumption (land)	The amount of land that changes from vacant to occupied (having a clear use or structure).
Employment	Employment data represents the number of people employed by businesses/organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents full-time equivalent jobs, based on a 38-hour work week.
Export Value	Represents the value of goods and services exported outside of the defined region that have been generated by businesses / organisations in each of the industry sectors within the region.
Gross Regional Product	The total value of final goods and services produced in the region over the period of one year.
Market Ready Land Supply	Land that is suitably zoned with a planning permit that is approved or in-train. This typically means that subdivision works are underway or about to commence, and the land is ready for market consumption. (available <12 months).
Output	Represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.
Value-Add	The marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-Added by industry sector is the major element in the calculation of Gross Regional Product / Gross State Product / Gross Domestic Product.



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