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BURNIE CITY COUNCIL

Burnie Settlement Strategy

State of play report

Final | 10 July 2024

Aboriginal acknowledgement

Burnie City Council acknowledges that every part of Australia is, always was and always will be, Aboriginal land.

Burnie City Council pays respect to the pakana / palawa – original owners and cultural custodians – of all the lands and waters across trouwunna / lutruwita / Tasmania upon which pataway / Burnie is situated.

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ABN 67 141 991 004

Cover image: Shayne Andrews

Job Number: 2324-021

Document Status

Document Version	Date	Author	Reviewer
Final	10 July 2024	Monica Cameron	Emma Riley Clare Hester Hit Send Burnie City Council

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Glossary

Abbreviation	Definition
AAGR	Average annual growth rate
ABARES	Australian Bureau of Agricultural and Resource Economics and Sciences
ABS	Australian Bureau of Statistics
BA	Building approval
BCET	Burnie Chip Export Terminal
Burnie	The settlement of Burnie
Burnie LGA	Burnie City Council LGA
CBD	Central Business District
CCRLUS	Cradle Coast Regional Land Use Strategy 2010-2030
COPD	Chronic obstructive pulmonary disease
COVID-19	Coronavirus pandemic
Council	Burnie City Council
DoTF	Tasmanian Department of Treasury and Finance
ERA	ERA Planning and Environment
GIS	Geographic information system
Greater Burnie	The study area (refer to Figure 2)
IRSAD	Index of Relative Socio-economic Advantage and Disadvantage
LIST	Land Information System Tasmania
LGA	Local Government Area
LPS	Local Provisions Schedule
LUPAA	Land Use Planning and Approvals Act 1993
SEIFA	Socio-Economic Indexes for Areas
State Growth	Tasmanian Department of State Growth
STP	Sewage treatment plan
SWOT	Strengths, weaknesses, opportunities and threats analysis
TPS	Tasmanian Planning Scheme – Burnie

Abbreviation	Definition
UTAS	University of Tasmania

Contents

1 Introduction

1.1 About the project

Burnie City Council is looking to prepare a settlement strategy for Greater Burnie (as defined in Figure 2) that provides a strategic blueprint for planning. The settlement strategy will manage the sustainable growth of the Burnie Local Government Area (LGA) furthering its role as a key city and population centre for North-West Tasmania.

The settlement strategy will inform and guide future use and development in Greater Burnie across the next 20 years. The strategy will be based on an understanding of community needs, economic opportunities (including emerging industries), population trends, local planning context, and the external 'big picture' environment that all influence the places people want to live, work, visit and invest in.

Importantly, the settlement strategy will provide spatial direction about where and how growth should occur in Greater Burnie. It is expected that the strategy will be reviewed and updated every five years. It will align with the *Cradle Coast Regional Land Use Strategy 2010-2030* (CCRLUS), and will also be a strategic planning document to inform future iterations of the Burnie Local Provisions Schedule (LPS) and revisions of CCRLUS.

1.2 About this report

The first phase of developing a considered and responsive settlement strategy is to understand Burnie now, the current planning environment, what the evidence is telling us about Burnie into the future, and then to consider key challenges and opportunities.

ERA Planning and Environment (ERA) in assisting Burnie City Council (the Council) has undertaken an analysis of the planning environment to understand past and future trends, and how people live, work, invest and play in the Burnie LGA, which is outlined in this report. The analysis includes reviewing several population projection scenarios, recent housing approvals, vacant land availability and socio-demographics.

The analysis in this report predominantly focuses on residential, commercial and industrial land supply and demand in the study area. The importance of agricultural and rural land is recognised, although not subject to detailed review. A review of open spaces and recreational areas is more appropriate to be addressed in separate strategic documents. It is understood that Burnie's Open Space Development Strategy was retired and archived in 2021 as it requires a refresh.

The report is structured into four key sections, outlined in Table 1.

Table 1: Report structure

Section 1	Section 2	Section 3	Section 4
Introduction	Context	Burnie now	Burnie in the future

1.3 About Burnie

The Burnie LGA is located on the north-west coast of Tasmania, as shown in Figure 1. It has a total area of 611 km^2 and extends along the coast from the Blythe River to the Cam River, and inland as far as St Valentines Peak to the south. The adjoining LGAs are Waratah-Wynyard to the west and south, and Central Coast to the east.

Just over 20,000 people live in the LGA[1], with approximately 87% of the population living in the Greater Burnie area (refer to Figure 2 showing the study area). The primary settlement is Burnie City, located on the Bass Strait coast, with a secondary settlement at Ridgley, located inland.

Most community services and facilities for the LGA are located in Greater Burnie, which is also a focus for economic activity; a key feature is the Port of Burnie adjacent to the Central Business District (CBD). Agricultural activity is an important economic activity for the LGA, and there are diverse major projects planned across the LGA, which influence the supply and demand of land, services and infrastructure in the Greater Burnie urban area. This study area is defined in Figure 2.

[1] Tasmanian Treasury estimated population 2023

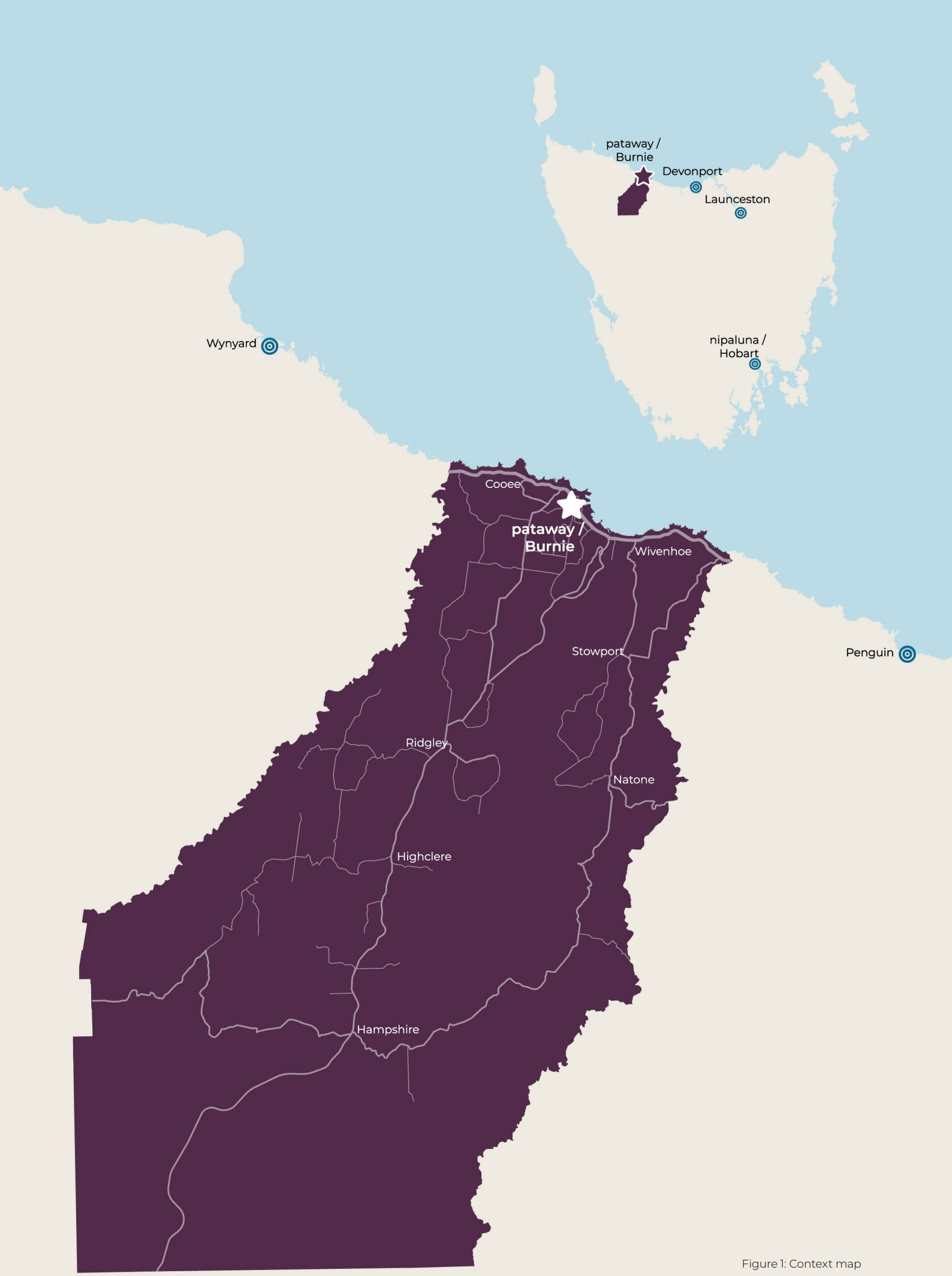


Figure 1: Context map

Figure 2: Greater Burnie (study area)

2 Context

2.1 Previous studies

Table 1 provides a list of the strategic documents that have been reviewed for this project. The analysis in this report relies on the information provided in the documents listed below.

Table 2 Reviewed strategic documents relevant to the strategy

Year	Title	Lead author	Document type
2023	City of Burnie Playground Study	Playstreet	Consultant report
2023	Burnie Gateway Commission – Public Art Project	Geoff Farquhar-Still and David Hamilton	Consultant report
2023	'Burnie Beats' Burnie City Centre Urban Plan	GHD	Consultant report
2022	Council Plan 2022-2025	Burnie City Council	Council operational plan
2021	Burnie Cultural Centre	Hirst Projects and Michael Connell & Associates and Burnie City Council	Council and Consultant report
2019	Waste Management Strategy 2018-2023	Burnie City Council	Council operational plan
2019	Strategic Asset Management Plan 2019-2029	Burnie City Council	Council operational plan
2023	Burnie 2044 Strategic Plan – Making a Better Burnie 2044	Burnie City Council	Council strategic plan
2017	Burnie City Centre Master Plan report – October 2016	GHD	Consultant report
2017	Settlement and Investment Strategy for Burnie to 2026 (original document released in 2007)	Choice Location Strategists	Consultant report
2017	Stormwater System Management Plan	Burnie City Council	Council operational plan

2.2 Planning system

2.2.1 Policy framework

Land use and development in Tasmania is undertaken within the framework of the Resource Management and Planning System (which is commonly known as the planning system). The planning system comprises a suite of legislation, supported by a network of planning schemes, policies and strategies. The hierarchy of these is demonstrated in Figure 3. A settlement strategy must be consistent with the policies and strategies in this planning framework. In other words, the Burnie settlement strategy did not start with a 'blank slate': it already has a robust policy foundation from which it has been developed.

The core planning legislation is the *Land Use Planning and Approvals Act 1993* (LUPAA). Key statutory documents under the planning system include the *Cradle Coast Regional Land Use Strategy 2010-2030* (CCRLUS) and the *Tasmanian Planning Scheme – Burnie*.

2.2.2 State policies

There are four (4) state policies that the planning system is required to be consistent with:

- Tasmanian State Coastal Policy 1996
- State Policy on Water Quality Management 1997
- State Policy on Protection of Agricultural Land 2009
- National Environment Protection Measures (which are recognised as State Policies under LUPAA).

The first three of these policies are particularly relevant to the strategy. The Burnie LGA includes a significant area of agricultural land which forms the edge to the urban areas of Greater Burnie. The LGA also contains the Bass Strait coastline and numerous water bodies and waterways. Key requirements from these policies relevant to the settlement strategy are as follows:

- All agricultural land in Tasmania is important and should be protected from encroachment by other land uses and development.
- New urban development in coastal areas should be primarily located in existing settlements, and ribbon development of residential and other urban development along the coastline is discouraged.
- Impacts on water quality from urban development should be considered, and opportunities to protect riparian areas and other natural systems that support maintaining our water quality along creek, rivers and other waterways should be maximised.

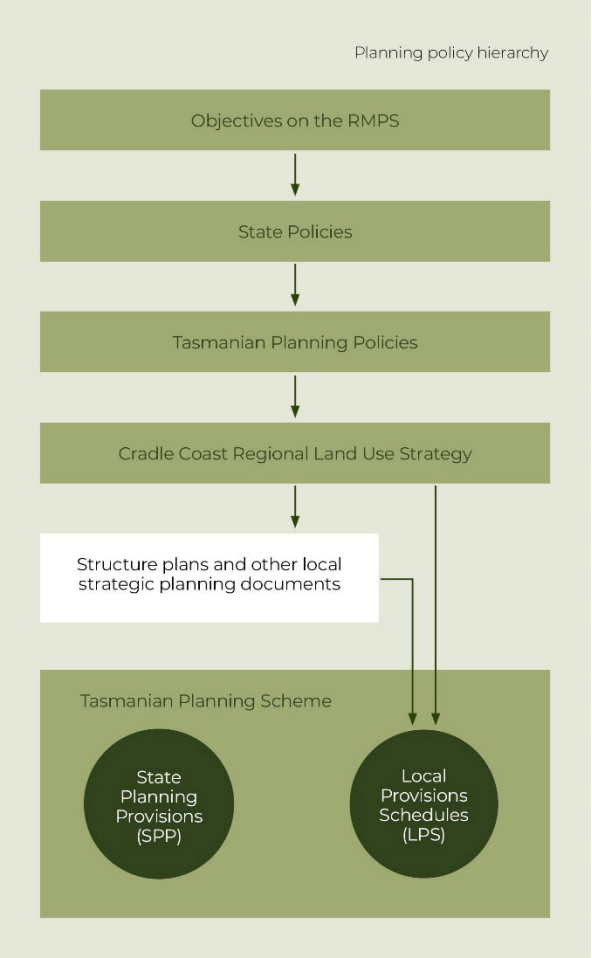


Figure 3 Planning policy hierarchy

The National Environment Protection Measures are statutory instruments that specify national standards for a variety of environmental issues and are primarily relevant to the more detailed planning stage.

2.2.3 Cradle Coast Regional Land Use Strategy

The Cradle Coast Regional Land Use Strategy (CCRLUS) provides a strategic foundation for land use planning in the Cradle Coast region, which comprises the Burnie City, Central Coast, Circular Head, Devonport City, Kentish, King Island, Latrobe, Waratah Wynyard and West Coast LGAs.

The CCRLUS provides a regional perspective on future growth and guides consistency and coordination between planning decisions by LGAs in the Cradle Coast region. It encourages the development of local settlement strategies, as these should support the location, scale and form of development and growth in LGAs.

While the CCRLUS is the strategic foundation for land use planning, it is based on data and strategic drivers that are now outdated. That said, the guiding principles in the CCRLUS are still valid and sound.

The CCRLUS states the following about Burnie:

- Burnie is a contained major centre, merging at its western boundary with the settlement of Somerset to create a combined population of more than 22,000.

- A 2008 study found that there was an existing 20 to 40-year residential land supply within Burnie. At that time, they concluded that there was no requirement to anticipate additional land releases through rezoning in the short to medium term.
- Ports at Burnie and Devonport handle a large portion of import and export cargoes for Tasmania and provide a critical node for major road and rail transport connections to the State's north and south.
- Manufacturing and transport industry is focused on the larger centres at Burnie and Devonport.
- Of the nine identified major industrial sites in Cradle Coast, two are in the Burnie City Council LGA. These are South Burnie/Wivenhoe (a light industrial estate) and Hampshire (wood chipping and forestry operations).

2.2.3.1 Managing growth and development

The CCRLUS provides a settlement management strategy at a broad scale for whether settlements in the Cradle Coast region should apply a high, medium, low or no growth strategy. The CCRLUS also indicates whether settlement growth and development are based on a negative, no growth, intensification, expansion, contained or new settlement scenario.

Most settlement growth in the region is expected to occur in the existing urban centres of Wynyard, Burnie, Penguin, Ulverstone, Devonport, Latrobe and Port Sorell. The two Regional Activity Centres are Burnie and Devonport, and this is where high-order business and commercial activity should be focused. In the Burnie LGA, Ridgley is recognised as a local service centre in the activity centre hierarchy, given it caters to the immediate needs of the local community.

Table 3 indicates growth scenarios and settlement management strategies for the main settlements within the Burnie LGA identified in the CCRLUS.

Table 3 Growth scenarios and settlement management strategies from the CCRLUS (Source: CCRLUS)

Settlement	Growth scenario	Settlement strategy
Burnie – Somerset	Medium	Contained
Natone	Low	Stable
Ridgley	Medium	Contained
All other settlements	Low	Stable

A **low growth scenario** means demand is driven largely by internal population change and very low rates of inward migration. Growth relies on existing land supply (including vacant zoned land) and available infrastructure within the designated urban boundary without need for intensification.

A **medium growth scenario** means demand is driven by internal population change and growth and/or moderate positive inward migration. Growth relies on intensification of existing land supply within designated urban boundaries and/or expansion.

A **stable settlement strategy** restricts new development to existing land supply within the designated urban boundary without priority for intensification. The strategy is appropriate for low growth settlements.

A **contained settlement** strategy promotes a mix of intensification and strategically planned expansion to retain compact urban form and provide a mix of development and growth opportunities. The mix does not need to occur in balanced proportion. The approach allows for optimum use of available and planned infrastructure in both established and new release areas.

2.2.4 Making a Better Burnie 2044 (Strategic Plan)

The *Making a Better Burnie 2044* strategic plan provides a long-term vision for Burnie City Council and was adopted by Council on 22 August 2023. There was significant input from the Burnie community. Creating the strategic plan enabled the Council to create goals and measures, setting a clear direction for Council and the community to develop and advance over the next 20 years.

The plan builds on the achievements of the community plan *Making Burnie 2030* and is the key planning document required by the *Local Government Act 1993*. The document aims to make Burnie a better place to live, work and visit by creating a sustainable environment, culturally rich communities and an active town centre. To achieve these goals, the city plans to take various measures, such as reducing waste to landfill, increasing native vegetation coverage, and advocating for the services needed in the community. The plan also emphasises the importance of strong leadership, community involvement and diverse housing options. The city aims to accommodate its growing population by providing affordable housing options and creating a range of employment opportunities.

The document outlines specific strategies for achieving each goal, such as developing a community engagement framework, creating a public art strategy, and implementing a waste management plan. The plan also highlights the importance of monitoring and evaluating progress towards the goals and making adjustments as needed.

2.2.5 Tasmanian Planning Scheme

The *Tasmanian Planning Scheme – Burnie* came into effect on 22 July 2020. This planning scheme comprises the State Planning Provisions, which provide consistency on use and development standards across the state, and the Local Provisions Schedule, which provides the zoning, overlays and planning rules specific to the Burnie area.

The zoning of land within the Burnie LGA informs the potential supply of future residential land, and the overlays guide development on land subject to considerations such as bushfire, inundation and natural assets.

The following zones are currently used in Burnie under the Tasmanian Planning Scheme. These are also shown in Figure 4 and Figure 5.

- General Residential
- Low Density Residential
- Rural Living
- Village
- Local Business
- Central Business
- Commercial
- Light Industrial
- General Industrial
- Rural
- Agriculture
- Landscape Conservation
- Environmental Management
- Port and Marine
- Utilities
- Community Purpose
- Recreation
- Open Space

Guideline No. 1 – Local Provisions Schedule (LPS): zone and code application, issued under Section 8A of the LUPAA, provides a reference guide for applying zones and codes under the LPS. The use of these zones will be reviewed as part of the next stage of the settlement strategy process. This will be key to determining the supply and demand, particularly of the residential, commercial, and industrial zones, and whether there is the potential for rezonings or back-zonings to ensure an appropriate supply is provided to facilitate and stimulate growth.

Figure 4: Residential zoning map

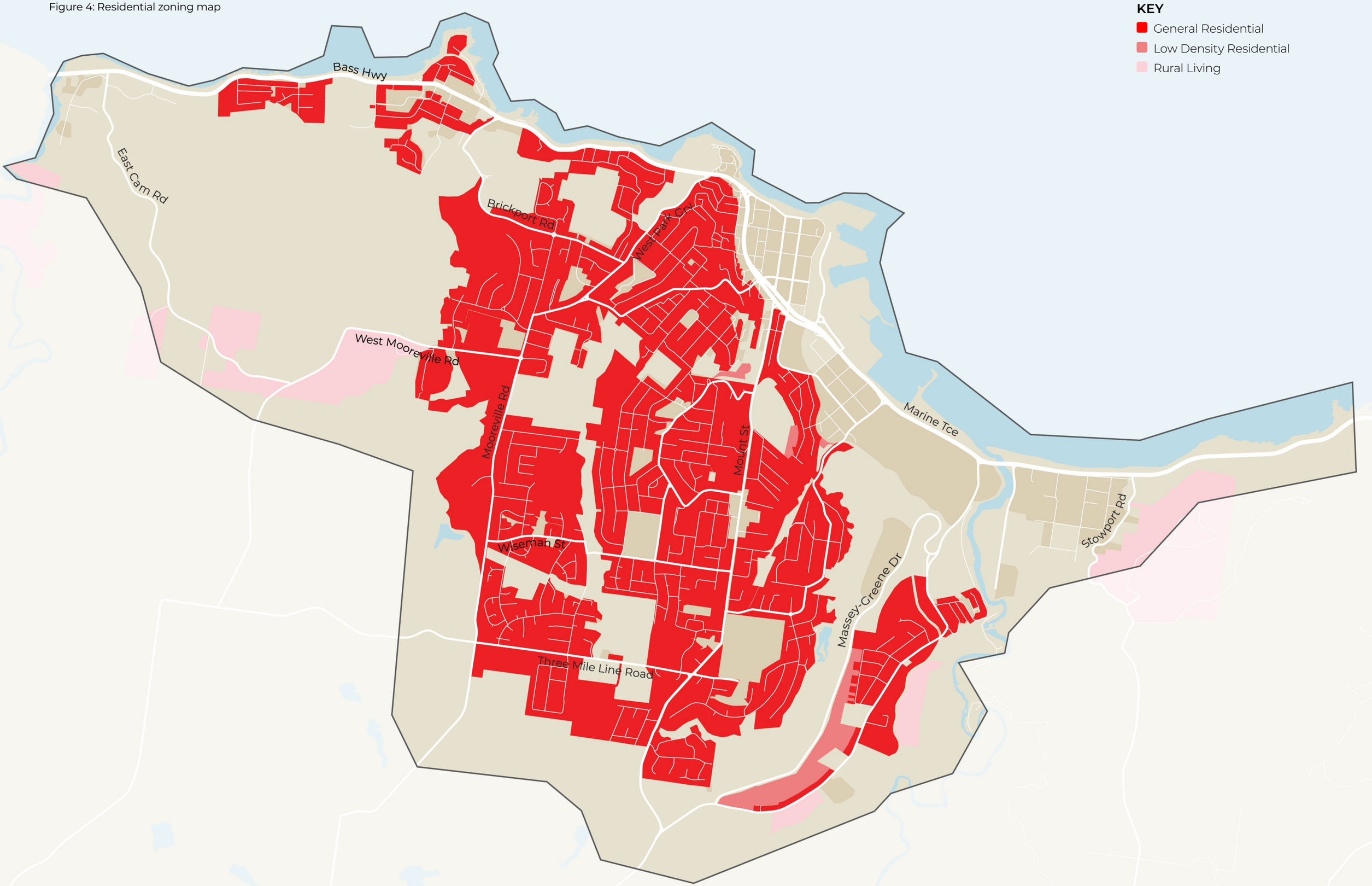
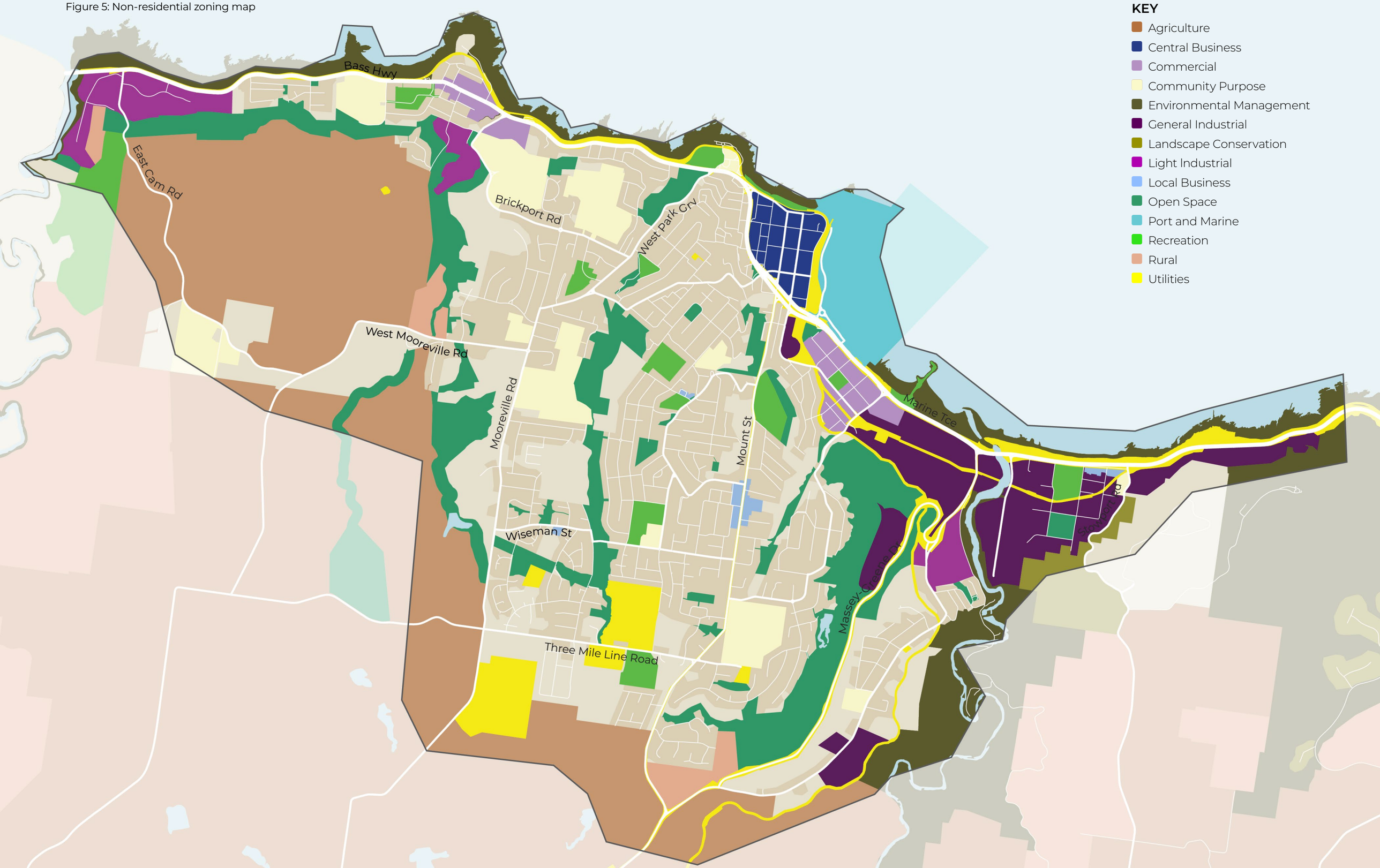


Figure 5: Non-residential zoning map



2.3 Parallel strategic work by Council

2.3.1 Playground study

Playstreet, in coordination with the Council, is in the process of undertaking a playground study for Burnie. The analysis included existing playgrounds and parks in Burnie, and a regional analysis of successful playgrounds in Devonport, Somerset, Wynyard and Ulverstone. Playstreet and Council have subsequently identified the need for a large destination park in the Burnie area, with the location yet to be decided.

2.3.2 Burnie Beats

The Council is working on two projects under the banner of Burnie Beats to find and create the beating heart of Burnie, by revitalising the CBD and gateway entries to the city.

The City Centre Urban Plan will be a transformational plan for the city centre over the next 10-15 years, capturing the essence of Burnie as the 'City of Makers'. The Urban Plan is intended to drive the city centre forward as a vibrant place that provides a range of experiences and activities and is engaging, inclusive, safe and easy to navigate for the local community and visitors. The Urban Plan aims to strengthen the city centre as a dynamic place to live, work, play and do business.

The Burnie Gateway project involves the community and artists, asking them to think about what the 'gateways' to Burnie are, and how they can be improved to enhance the experience of entering the city. The gateways project aims to instantly identify the entrance to Burnie city, promote a sense of arrival, complement the existing surrounds, and convey a clear community identity. The gateway will also signal the next chapter in Burnie's story to help create a new vision for the city's future for the local community and visitors to the area.

2.4 Large-scale projects and industries

In the wider North-West region, several renewable energy projects are proposed or approved, and these will generate a significant number of jobs directly and indirectly and have social and economic benefits for the Burnie LGA. A snapshot of renewable energy projects in Tasmania is shown in Figure 6.

Figure 6 Snapshot of publicly announced existing and planned large-scale renewable energy infrastructure (Source: ReCFIT)

The existing and proposed renewable energy projects in the area will continue the trend of the Burnie LGA being a significant manufacturing and industrial hub. Burnie has a very strong industrial and manufacturing history, and these industries employed (some still do) a significant proportion of residents. Examples include the Burnie Paper Mill (Associated Pulp and Paper Mills), Tioxide, Elphinstone (formerly Caterpillar Elphinstone) and the Port of Burnie. The difficulty with this model is if they close, relocate or go through redundancies, it can have a significant impact economically and socially. Tioxide closed in 1996, the Burnie Paper Mill closed in 2010, and Caterpillar made nearly 300 staff redundant in 2015, impacting hundreds of residents and the effects being evident on census statistics, including the unemployment rate and key industry profile.

There are significant projects in the Burnie LGA and nearby that are either currently in the assessment process or already approved and will create substantial opportunities for direct and indirect jobs and broader investment. These include the Port of Burnie upgrade, Elphinstone expansion, Marinus Link, the North West Transmission upgrade project, the Hampshire efuel plant, and a number of proposed and approved wind farms in the North West region. These are all discussed further below.

In total these projects have potential to generate approximately 5,700 construction jobs[2] for the region and approximately 415 full time ongoing operational jobs[3] (not including the unknown number of ongoing jobs associated with the Port of Burnie upgrade and Marinus Link, which are likely to be in the hundreds). These numbers reference direct construction and ongoing jobs, and do not consider the additional indirect jobs (also likely to be in the hundreds) that will be required. These projects will significantly increase pressure on housing, commercial and industrial activity in the Burnie LGA and greater Cradle Coast region.

2.4.1 Elphinstone

Elphinstone is located in Burnie and is a leading manufacturer of quality products for the global underground and surface mining industries. The product range includes specialised underground support vehicles and surface mining solutions, including extended distance off-highway haulage trucks and water tanks to suit Caterpillar articulated trucks.

Dale Elphinstone first began modifying Caterpillar equipment to suit underground mining in 1975, and since then he has been manufacturing and selling specialised machinery and equipment from Burnie to customers in Australia and overseas. In 1995 Caterpillar Elphinstone Pty Ltd was established, a joint venture between Caterpillar Inc and Elphinstone Pty Ltd. Caterpillar announced in 2015 that it would cut around 280 jobs at the Burnie factory and move some production to Thailand, leaving only 120 jobs at the site. Job losses were effective from June 2015 and continued through to the end of the year. The job losses had a significant impact on the local economy and the impacts were clear in the census employment statistics in 2016.

In 2016, Dale Elphinstone formed Elphinstone Pty Ltd, taking back the Burnie manufacturing facilities and the 'Elphinstone' brand from Caterpillar. The company started hiring local staff again and, with the demand for mining and industrial equipment so strong, is still expanding the workforce in Burnie. A job growth of about 100 new jobs[4] is expected over the next few years.

2.4.2 Port of Burnie

The Port of Burnie is located directly adjacent to the Burnie CBD and is a major Tasmanian deep-water port. As TasPorts describes it[5], the Port of Burnie supports a variety of industries, including by:

- Moving forestry products from Tasmania and being home to the Burnie Chip Export Terminal (BCET)
- Supporting strong bulk minerals export volumes to both domestic and international markets
- Supporting approximately 45% of the state's container movements
- Facilitating cruise ships visiting Burnie.

TasPorts launched its Port Master Plan in 2018 to guide significant capital investment in Tasmanian port infrastructure over a 15-year period. The Port of Burnie was identified as a key component of this Plan, with significant opportunity identified to enable growth in bulk mineral exports, along with scope to develop an

[2] Includes 1000 construction jobs for the proposed Port of Burnie upgrade, 1500 for Marinus Link, 200 for the North West Transmission upgrade project, 2000 at the efuel plant in Hampshire, 400 construction jobs at Jim's Plain and Robbins Island wind farms, 200 for construction of the Whaleback Ridge wind farm, 200 for Hellyer wind farm and 200 for the Guildford wind farm. Noting these figures are all approximate given they are projected numbers.

[3] Includes 100 projected new jobs at Elphinstone, 200 full time at the Hampshire efuel plant, 65 ongoing jobs at the Jim's Plain and Robbins Island wind farms, 10 jobs at the Whaleback Ridge wind farm, and 20 jobs each at the Hellyer and Guildford wind farms. Noting these figures are all approximate given they are projected numbers.

[4] Based on advice provided to Council

[5] TasPorts website: https://www.tasports.com.au/projects/burnie-gateway

international container terminal. In February 2021, the Burnie Gateway initiative was included in Infrastructure Australia's Priority List, recognising its national significance.

The Tasmanian minerals sector is projected to experience significant growth. A fundamental key to facilitating this growth is the capability to accommodate larger bulk export vessels at the Port to enable shipping direct to global markets. Current mineral storage and shiploader constraints are also significant inhibitors to growth. Bulk export industry representatives are aligned on the Port of Burnie as Tasmania's preferred bulk export port. The only deepwater port on Tasmania's north-west coast, the port is also logistically suited to bulk export due to its proximity to mineral deposits.

Through a combination of dredging and the development of landside infrastructure, the port offers exponential growth for the Tasmanian minerals sector. TasPorts recognises the importance of investing in these works and development as necessary to ensure Tasmania can keep pace with supply-side pressures in the future. The port expansion will also be integral to the construction phase of the proposed renewable energy projects in North-West Tasmania.

2.4.3 Marinus Link

Marinus Link is an underground and undersea electricity and data cable between Tasmania and Victoria. The cable will run 255 km under the sea from North-West Tasmania to Waratah Bay in Victoria, then a further 90 km underground to the Latrobe Valley. Converter stations at each end will convert the electricity from direct current to alternating current, for use in the states' grids. Marinus Link will have a 1,500 megawatt capacity, equal to the power supply for 1.5 million Australian homes.

The proposed location of Marinus Link in North-West Tasmania enables connection into some of Australia's best renewable energy and storage resources. The former Tioxide site at Heybridge, in the Burnie LGA, is currently identified as the likely site for the Marinus Link converter stations and where Marinus Link will connect with the TasNetworks Transmission Network. The construction phase will create a significant number of jobs for the Burnie LGA and the wider North-West region, having a positive impact on the economy.

North-West Tasmania has been identified as a high priority renewable energy zone, and the extra capacity provided by the Marinus Link will assist in unlocking the large-scale wind, existing hydro capacity, and new pumped hydro energy storage resources planned for development in the region.

The timing of the project is unknown as relevant planning and environmental approvals are still to be obtained. It is anticipated that about 150-200 jobs[6] will be generated in the Burnie LGA associated with the Marinus Link project.

2.4.4 North West transmission upgrade project

The North West Transmission upgrades project is a TasNetworks project and, as mentioned above, will connect with Marinus Link. It includes 240 km of new and upgraded transmission lines and other energy infrastructure that will increase the capacity of Tasmania's electricity network[7]. Infrastructure includes 220kV overhead electricity transmission line, transmission towers, and ancillary facilities. The route connects Palmerston to Sheffield, Sheffield to Heybridge, Heybridge to Burnie, Burnie to East Cam, East Cam to Hampshire Hills. The North-West transmission network routes are shown on Figure 6. It is understood these routes are still to be finalised, however, will provide connections to existing and proposed renewable energy projects, such as those mentioned below.

[6] Based on advice provided to Council

[7] Information from TasNetworks website (Source: https://talkwith.tasnetworks.com.au/north-west-transmission-developments-2)

2.4.5 Guildford and Hellyer wind farms

Two new wind farms are proposed at 2753 Ridgley Highway, Hampshire, approximately 26 km south-west of Burnie, by Ark Energy. The site is within one of Tasmania's candidate renewable energy zones identified by the Australian Energy Market Operator as optimal for new renewable energy generation. The Hellyer Wind Farm will be located in the Burnie LGA, while Guildford will adjoin but be located in the Waratah-Wynyard LGA.

Combined, the two proposed wind farms will involve 128 wind turbines and have a total generating capacity of 750 megawatts. Infrastructure will include roads, construction hardstand and laydown areas, temporary concrete batching plants, temporary construction site office and amenities, and an operations site office and maintenance building.

The Hellyer process commenced in 2022, and Guildford in 2020, with lodgement of notices of intent and referrals to the Commonwealth. Impact assessment studies are currently in progress.

2.4.6 E-fuel plant

HIF Global has proposed a carbon neutral e-fuel (electricity-based fuels) plant at Surrey Hills, in the Burnie LGA. The plant is still under assessment by relevant authorities including the Council and the Environmental Protection Authority, so has not yet been approved or constructed.

The e-fuel plant is a commercial scale chemical plant (using electrolysis and methanol synthesis processes) which will produce up to 80,000 tonnes per annum (100 million litres) of e-fuel, using wood waste and forestry residue. E-fuels are clean, carbon neutral fuels, produced from renewable energy, green hydrogen and carbon dioxide taken from the atmosphere. The carbon neutral e-fuel is stored in tanks and then loaded into tanker trucks for transport offsite to both local and international customers. The e-fuels have the same chemical properties as fossil-based fuels and can therefore be used as direct substitutes in existing engines and infrastructure.

The e-fuel plant is proposed in the Surrey Hills area, to the south-west of Burnie, at 2753 Ridgley Highway, Hampshire. The footprint of the site is about 40 ha, extending across five titles. The site is located within an operating forestry plantation, and the Forico Surrey Hills Chip Mill is located immediately to the south.

The plant will be designed to have an operational life of at least 40 years, and would operate up to 24 hours a day, seven days a week. Construction of the plant is likely to take 24-30 months. It is anticipated that the plant will generate around 200 permanent jobs.

2.4.7 Robbins Island and Jims Plains wind farms

The Jim's Plains and Robbins Island Renewable Energy Parks project by UPC Renewables involves the development of two neighbouring wind farm projects in the Circular Head LGA. The $1.6B project is one of the largest private investments ever for Tasmania. Including jobs and procurement, it is expected to generate $600 million into the Tasmanian economy during construction, and more than $30 million each year for the next 25 years once operational. The wind farms will connect to Basslink and Marinus Link via the North-West Transmission network, allowing excess power that is generated to be exported to the mainland.

Jim's Plains Wind was approved in 2020 and includes approximately 31 wind turbines and solar PV, with a total capacity of up to 240 megawatts. The Robbins Island wind farm has received approval by Tasmania's Environmental Protection Authority in 2022, and planning approval through Circular Head Council (after an appeal via the Tasmanian Civil and Administrative Tribunal).

2.4.8 Whaleback Ridge Wind Farm

Westcoast Renewable Energy is proposing the development of the Whaleback Ridge Renewable Energy Project on the west coast. It is proposed to comprise up to 500 wind turbines with a projected generating

capacity of approximately 3,000 megawatts and ancillary infrastructure including a network of access roads, electrical infrastructure, and operations facilities. If constructed, this would be the largest renewable energy project in Tasmania. The project is in the very early stages of the approval process, with the Major Project draft assessment criteria having been recently released and are currently on public exhibition.

3 Burnie now

3.1 Population profile

The Burnie LGA has experienced a change in the socio-demographic profile of its population since 2011, including a steady increase in total population. In less than one year, the estimated resident population of the Burnie LGA increased by 554 people from the ABS census in August 2021 to June 2022, increasing from 19,918 to 20,472[8] people.

Some key population trends for the Burnie LGA between 2011 and 2021 include:

- A 3% overall growth rate in population.
- An increase in the median age of the population from 38 in 2011 to 40 in 2021. This has steadily increased from 37 in 2001 and 2006, to 38 in 2011, and 40 in 2021. The Burnie median age remains younger than the median age of Tasmania's population of 42 in 2021, but this is expected to change as more people of working age move to the area for the renewable energy projects.
- The age profile of the population shows a decrease in the proportion of the population aged 14 and under. In 2011 the 0-14 age group made up nearly 20% of the population, and this decreased to nearly 18% in 2021. This, however, is still higher, proportionally, than the Tasmanian statistics.
- The working age group is typically made up of the 15-64 cohort. This age group has seen a significant drop between 2011 and 2021, going from about 64% of the population in 2011, 63% in 2016, and then dropping considerably to only 56% in 2021. The age group that experienced the most change during this time was the 25-54 group, which changed from 36.7% to 30.8% between 2016 and 2021. These changes are likely due to an ageing population and people leaving the Burnie LGA.
- The 65 and over age group has increased in size, changing from being 16% of the population in 2011 to 18.4% in 2016, to 19% in 2021. These statistics indicate that while the population is ageing, it is actually slowing down, with only a 0.6% increase in the age group between 2016 and 2021. Interestingly, the biggest change for this cohort was between 2011 and 2016, which does not align with the bigger change in the working age group between 2016 and 2021.
- The unemployment rate has dropped in Burnie between 2011 and 2021, from 8.5% to 6%, which is now in line with the unemployment rate in Tasmania. This indicates that there are good employment prospects in the Burnie LGA and Cradle Coast region.
- There have been minimal changes in family structure for Burnie's population since 2011.

The 2021 Census looked for the first time at the level of incidence of selected long-term health conditions in the community. In Burnie, 39.4% of the population has one or more long-term health condition, a higher rate than in Tasmania (37.5%). The most common long-term health condition in Burnie is a mental health condition. Long-term health conditions impacting the Burnie community include:

- Mental health condition (including depression or anxiety) – 12.7% in Burnie compared to 11.5% in Tasmania
- Arthritis – 11.6% in Burnie compared to 12.2% in Tasmania
- Asthma – 11.1% in Burnie compared to only 9.4% in Tasmania
- Other long-term health condition – 9.2% in Burnie compared to 8.9% in Tasmania
- Diabetes (excluding gestational diabetes) – 5.8% in Burnie compared to 5.1% in Tasmania
- Heart disease (including heart attack or angina) – 4.4% in Burnie compared to 4.5% in Tasmania

[8] ABS estimated resident population data 2022

- Cancer (including remission) – 3.1% in Burnie compared to 3.4% in Tasmania
- Lung condition (including COPD or emphysema) – 3.1% in Burnie compared to 2.5% in Tasmania
- Kidney disease – 1.3% in Burnie compared to 1.1% in Tasmania
- Stroke – 1.1% in Burnie compared to 1.2% in Tasmania
- Dementia (including Alzheimer's) – 0.8% for Burnie and Tasmania.

This means that ongoing provision of health and social services will be critical in the area. A summary of key statistics relevant to the community is shown in Table 4.

Table 4 Summary of key census statistics for Burnie (Source: Australian Bureau of Statistics, 2011, 2016 & 2021)

	Burnie			% change in Burnie	Tasmania
	2011	2016	2021	2011 - 2021	2021
Population					
Total	19,329	18,895	19,918	3.05%	557,569
Female	10,043 (52.0%)	9,809 (51.9%)	10,313 (51.8%)	2.69%	283,804 (50.9%)
Male	9,286 (48.0%)	9,084 (48.1%)	9,606 (48.2%)	3.45%	273,765 (49.1%)
Median Age					
Median Age	38	41	40	5.26%	42
Age Profile					
0-4	6.5%	6.0%	5.7%	-12.31%	5.1%
5-14	13.4%	12.3%	12.4%	-7.46%	11.6%
15-24	13.8%	13.7%	12.3%	-10.87%	11%
25-54	38.2%	36.7%	30.8%	-19.37%	38.1%
55-64	12.1%	12.8%	13.1%	8.26%	13.5%
65 and over	16.1%	18.4%	19%	18.01%	20.9%
Employment[9]					
Worked Full Time	55.6%	51.5%	53.5%	-3.78%	51.6%
Worked Part Time	30.0%	34.1%	34.4%	14.67%	36.4%
Unemployed	8.5%	8.9%	6.0%	-29.41%	5.9%
Income					
Median weekly household income	$854	$993	$1,225	43.44%	$1,358

[9] Percentage of the active labour force, not the entire population.

	Burnie			% change in Burnie	Tasmania
	2011	2016	2021	2011 - 2021	2021
Median monthly mortgage repayments	$1,148	$1,083	$1,129	-1.66%	$1,313
Median weekly rent	$175	$200	$240	37.14%	$290
Family Structure					
Couple family without children	41.2%	41.2%	41.6%	0.97%	44.5%
Couple family with children	38.5%	37.2%	37.0%	-3.90%	36.8%
One parent family	19.2%	20.4%	19.9%	3.65%	17.3%
Other	1.0%	1.2%	1.5%	50.00%	1.4%
Dwellings					
Total dwellings	8,376	8,460	8,856	5.73%	247,597
Occupied private dwellings	7,617	7,544	8,104	6.39%	218,412
Unoccupied private dwellings	759	916	752	-0.92%	29,185
Household Type					
Family household	68.3%	66.1%	65.5%	-4.10%	67.6%
Single (or lone) person household	29.1%	31.4%	32.0%	9.97%	29.0%
Group household	2.6%	2.4%	2.5%	-3.85%	3.4%
Dwelling Structure					
Separate house	88.9%	90.3%	90.2%	1.46%	87.7%
Semi-detached, row or terrace house, townhouse etc.	4.3%	6.9%	7.8%	81.40%	6.1%
Flat or apartment	6.3%	2.3%	1.8%	-71.43%	5.3%
Other	0.4%	0.2%	0.2%	-50.00%	0.6%
Dwelling Size					
No bedrooms	0.3%	0.2%	0.5%	66.67%	0.5%
One bedroom	3.4%	4.0%	3.8%	11.76%	4.7%
Two bedrooms	18.1%	18.0%	17.7%	-2.21%	20.5%
Three bedrooms	58.0%	56.1%	55.5%	-4.31%	49.6%

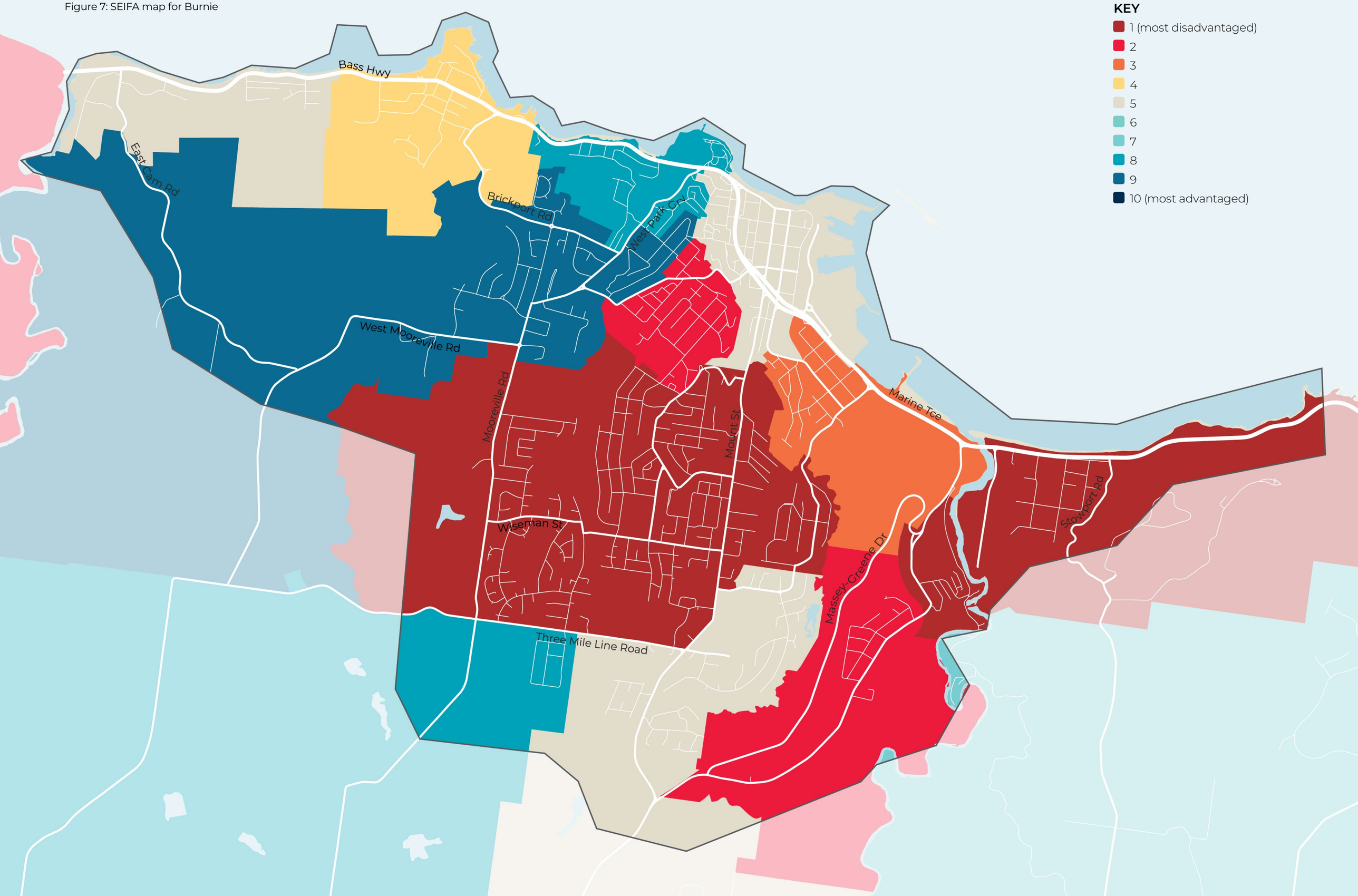
	Burnie			% change in Burnie	Tasmania
	2011	2016	2021	2011 - 2021	2021
Four or more bedrooms	18.7%	19.0%	21.0%	12.30%	23.2%
Household Size					
Average people per household	2.4	2.3	2.3	-4.17%	2.4
Car ownership					
Average motor vehicles per dwelling	1.7	1.7	1.8	5.88%	1.9

The Socio-Economic Indexes for Areas (SEIFA) score for the Burnie LGA in 2021 was 920. The SEIFA score varies within the Burnie LGA though, which is demonstrated in Figure 7. Across Australia's local government areas, SEIFA scores range from 143 (most disadvantaged) to 1,207 (least disadvantaged). In 2021, Burnie ranked 94 out of 547 local government areas with SEIFA scores in Australia. This means that there are 453 local government areas which are less disadvantaged, and 93 local government areas that are more disadvantaged. Given Burnie's score is relatively low, it indicates that the area is relatively disadvantaged compared to elsewhere in the country. However, as shown in Table 5, Burnie has become slightly more disadvantaged since 2011.

Table 5 Summary of disadvantage statistics for Burnie

	2011	2016	2021	% change from 2011 to 2021
SEIFA	921	915	920	-0.11%
IRSAD	907	896	895	-1.32%

Figure 7: SEIFA map for Burnie



3.2 Settlement populations

The five most populous suburbs in the City of Burnie are Park Grove, Shorewell Park, Upper Burnie, Romaine and Acton, as shown in Table 6. Park Grove has had the most significant population increase, growing by 228 people between 2016 and 2021.

Table 6 Population statistics for Burnie

Population	2011	2016	2021	% change from 2011 to 2021
Acton (Tas.)	1,539	1,349	1,377	-10.53%
Park Grove	2,355	2,385	2,613	10.96%
Romaine	1,739	1,713	1,850	6.38%
Shorewell Park	2,037	2,008	2,150	5.55%
Upper Burnie	1,756	1,821	1,891	7.69%

3.3 Housing and residential activity

On census night 2021, the ABS recorded a total of 8,104 occupied dwellings, compared to 752 unoccupied dwellings, in the Burnie LGA. This suggests that 91.5% of dwellings are occupied by permanent residents, with the remaining 8.5% being used for seasonal population (holiday homes) and visitor accommodation (excluding private dwellings solely used for visitor accommodation). This is based on the assumption that people aren't typically on holiday in August, the month when the census occurs, which means that people would likely be at their primary place of residence and not staying in their holiday houses or second dwellings. This is quite a low rate of unoccupied dwellings compared to other Tasmanian LGAs.

There were 1,521 building approvals issued for residential buildings (this includes new houses, alterations and additions, outbuildings over $10,000 in value, and other types of residential) between July 2012 and June 2023[10]. This equates to 137 dwellings on average per year. The greatest number of building approvals (264) were issued in the 2020-21 financial year. This increase was likely due to the support payments for new housing provided by state and federal governments during the COVID-19 pandemic. In the 2021-22 financial year, building approvals dropped to 185, and again to 152 in the next financial year. These approval rates are greater than the number being approved on average in the years leading up to the pandemic.

Between 2012 and 2022 there were 405 planning permits issued, noting this includes permits for single dwellings, multiple dwellings, outbuildings, alterations and additions, and other residential approvals. This equates to an average of 37 residential planning permits per year. About 61% of these approvals were in the General Residential zone and more than 80% were in residential zones.

The provision of new residential land is being facilitated through subdivision approvals including:

- Madeline Drive, Webb Avenue and Arhanni Street, Mooreville: 131 lots
- Oasis Drive, Shorewell Park: 111 lots
- Hillfarm Drive, Park Grove: 93 lots
- Janet Drive and Mills Road, Park Grove: 92 lots.

These four subdivisions are shown in Figure 8. There have been 536 new lots approved across 11 subdivisions since 2013, or on average 53.6 lots per year in the last 10 years. All subdivisions approved during this time are

[10] Data provided by Council

in the settlement area of Burnie, with most being in Park Grove, Shorewell Park and Upper Burnie. These are contributing to Burnie having greater dwelling density, as shown in Figure 9.

Figure 8: Burnie subdivision approvals

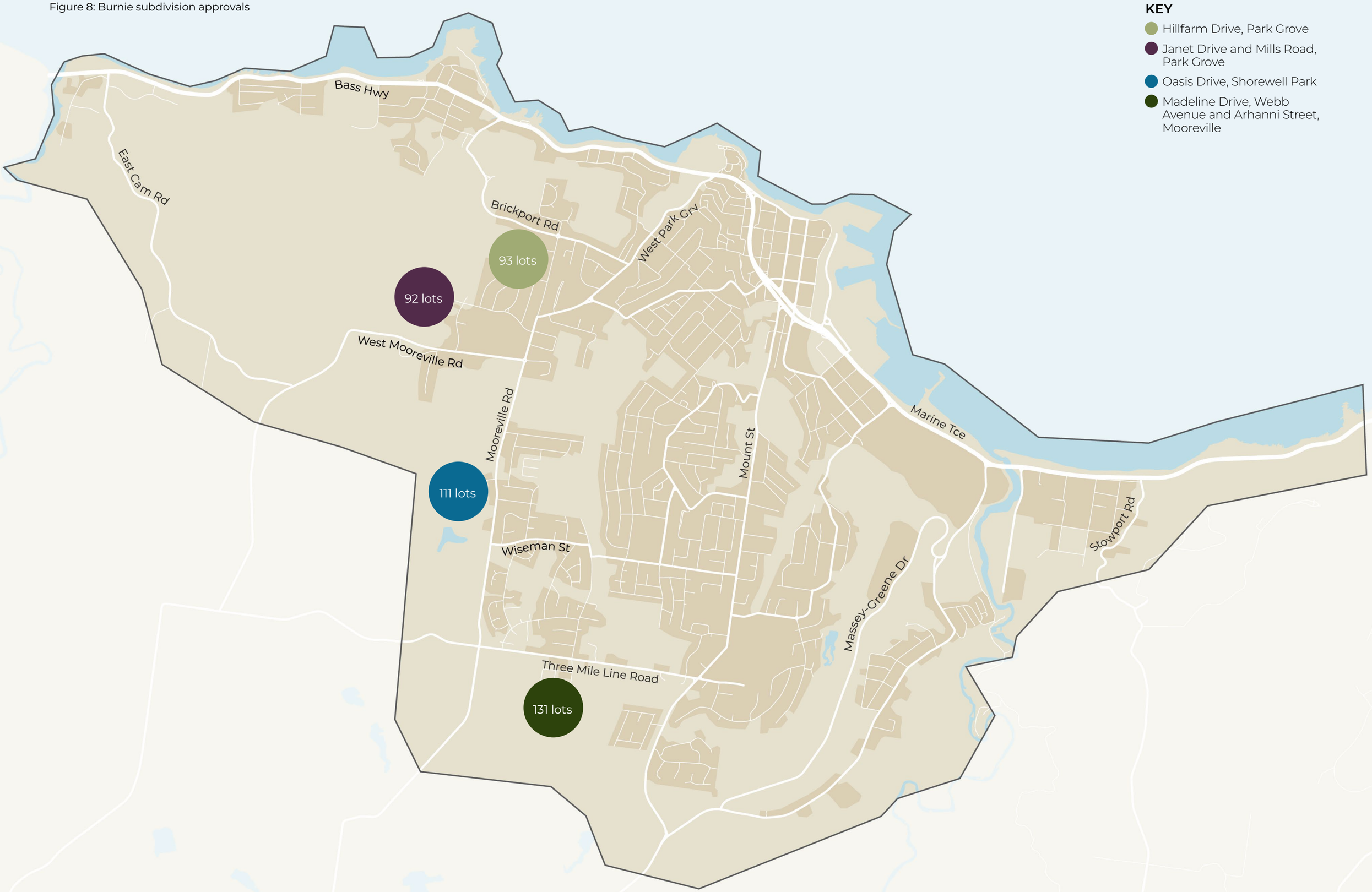
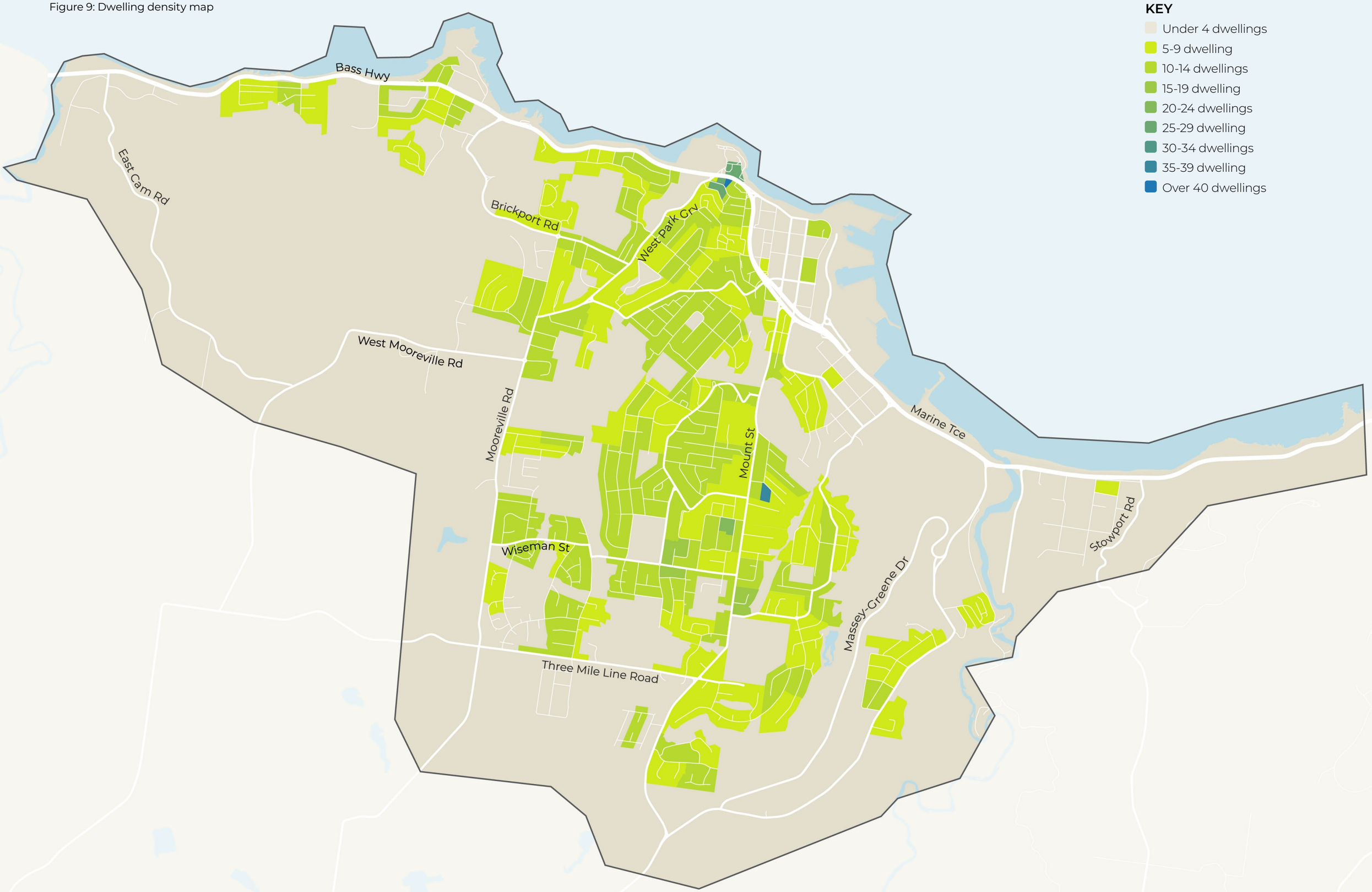


Figure 9: Dwelling density map



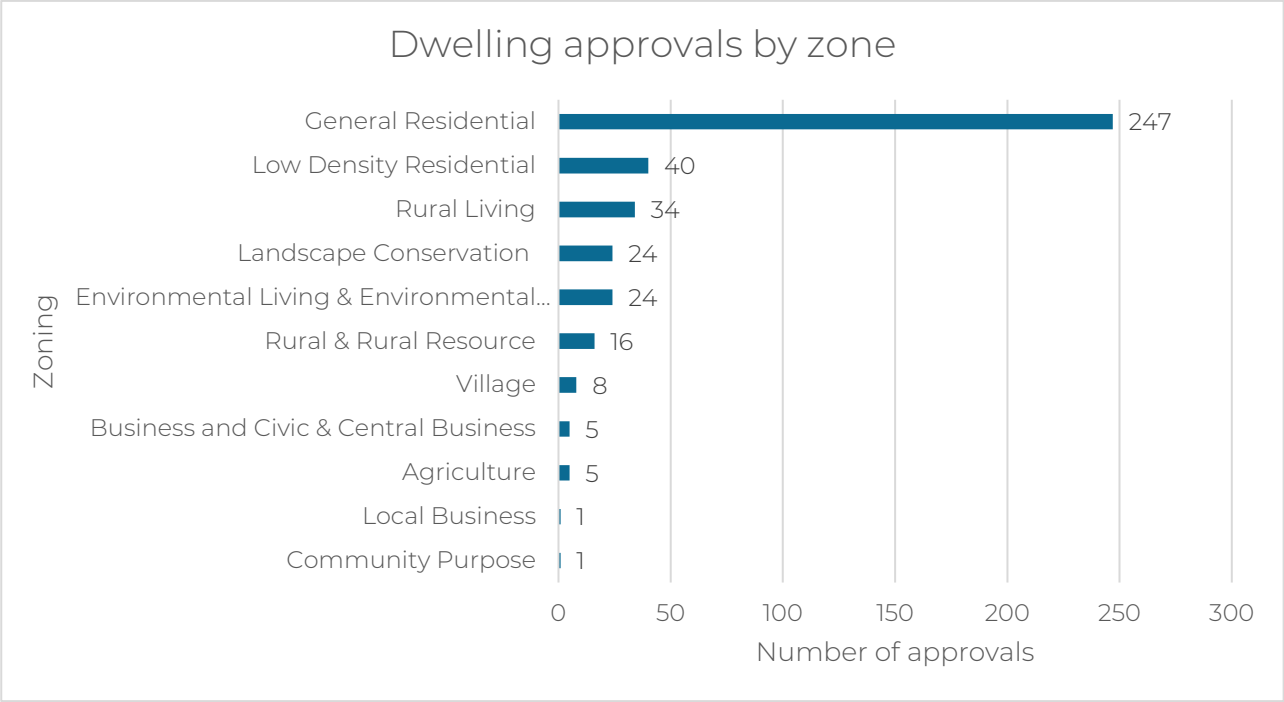


Figure 10 Dwelling approvals in Burnie LGA by zone between 2012 and 2022 (data provided by Council)

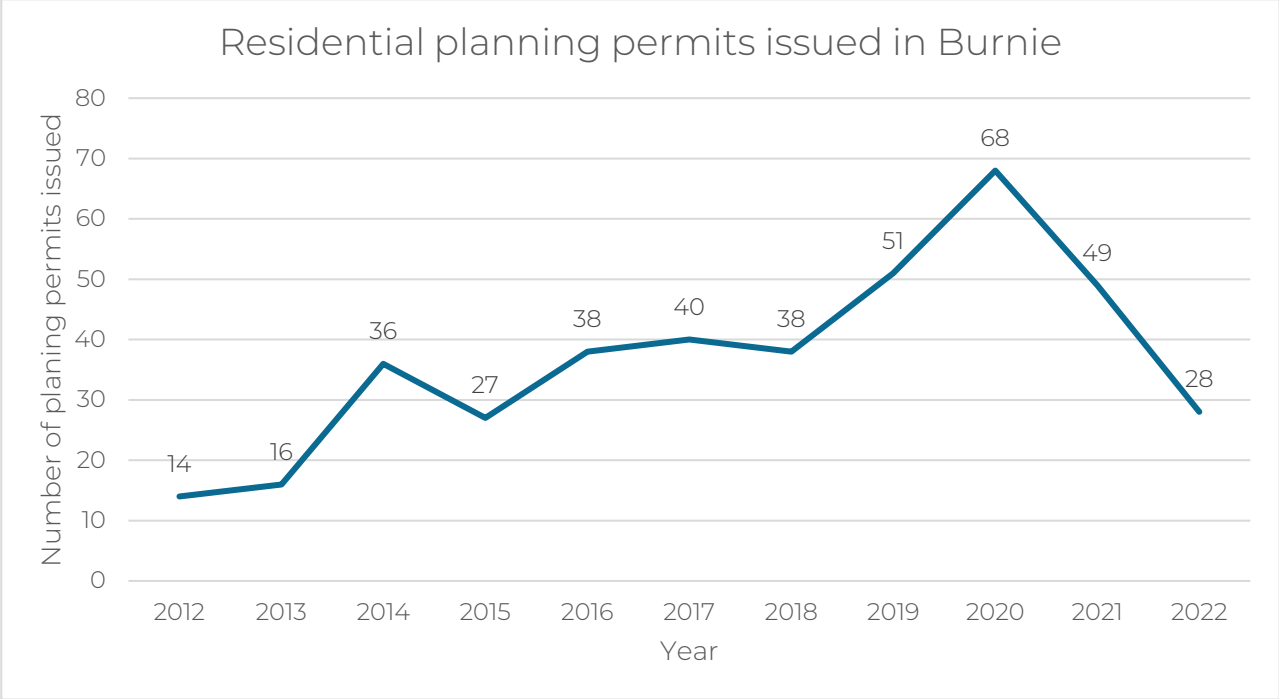


Figure 11 Residential planning permits issued per year in Burnie between 2012 and 2022

The predominant dwelling type in Burnie is separate houses, which have been consistently about 90% of the housing stock over the past 10 years. Furthermore, most houses in Burnie have three or more bedrooms, indicating that the predominant housing type in Burnie is a large, detached, family home. Of the occupied private dwellings recorded in Burnie in the 2021 census, 33.2% are owned outright, 32.3% are owned with a mortgage, and 31.9% of homes are rented.

The median household income of $1,225 per week is lower than the Tasmanian median of $1,358 and substantially lower than the Greater Hobart median of $1,517. Comparing household income levels in Burnie in 2021 compared to Tasmania shows that there was a smaller proportion of high income households in Burnie (those earning $3,000 per week or more) and a higher proportion of low income households in Burnie (those earning less than $800 per week). Overall, 10.6% of households earned a high income and 30.8% were low income households, compared with 14.0% and 27.4% respectively for Tasmania.

The 2021 census indicates that in Burnie LGA, 10% of mortgages exceeded 30% of household income, which is consistent with Tasmania. Housing is considered affordable when it costs less than 30% of a household with a lower income. In comparing to the median in Tasmania, the median monthly mortgage repayments in Burnie are significantly lower at $975 per month compared to the median of $1,300 per month in Tasmania. Further, 5.2% of households were paying high mortgage repayments and 50.6% were paying low repayments in Burnie, compared with 9.6% and 38.0% respectively in Tasmania. This all indicates that housing in relation to median income in Burnie is cheaper than the Tasmanian average.

3.4 Vacant land supply

Existing vacant land supply in the Burnie LGA is summarised in Table 7 and Table 8 below. This land supply has been determined through a desktop GIS analysis via data provided by the Council and the Land Information Services Tasmania (LIST). It includes both private and publicly owned land but excludes easements (that is, land that forms part of the road, railway or footway network). It is recognised that it may be possible that some vacant land has recently been developed or has been incorrectly classified from that found on the LIST.

It is important to note that the land supply analysis has not tested the developability of the land in a practical sense. It may therefore include land that is not currently serviced or has significant land constraints such as overlays or the siting of an existing dwelling that practically precludes development. For example, there is vacant and residentially zoned land in Burnie that is flood prone and landslip prone, or land that is not water or sewer serviced, all of which will limit development potential.

The data is showing that there are 582 vacant residentially zoned lots in the Burnie LGA with nearly 90% of these being in the General Residential zone. There are also 57 vacant industrially zoned lots, and 47 vacant lots in commercial and business zones. These are shown in Figure 12 and Figure 13.

Table 7 Residential land supply (Source: ERA Planning and Environment, The LIST)

Zoning	Vacant area (ha)	No. of vacant lots
General Residential	176.23	522
Rural Living	49.93	31
Village	7.60	19
Low Density Residential	9.52	10
TOTAL	**243.29**	**582**

Table 8 Non-residential land supply (Source: ERA Planning and Environment, The LIST)

Zoning	Vacant area (ha)	No. of vacant lots
General Industrial	30.77	42
Light Industrial	13.60	15

Zoning	Vacant area (ha)	No. of vacant lots
Commercial	2.45	21
Central Business	1.36	24
Local Business	0.11	2
TOTAL	**48.30**	**104**

Figure 12: Vacant residential land in Burnie

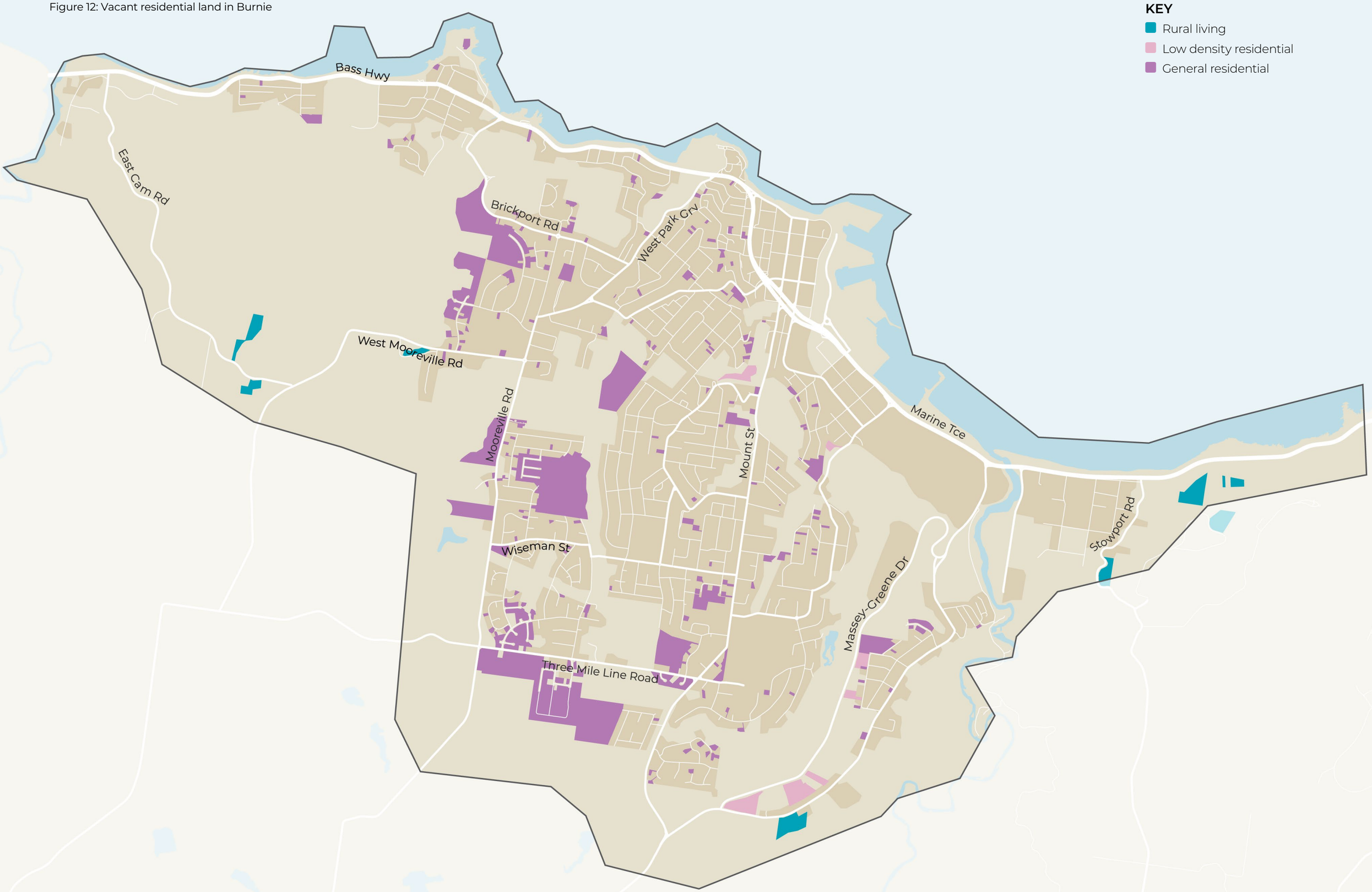


Figure 13: Vacant non-residential land in Burnie

3.5 Key industries and employment profile

The number of employed people in the Burnie LGA increased by 1,045 between 2016 and 2021. The ABS census data allows us to understand where these people work and what roles they have, so that we can know what the main industries are in the Burnie LGA and what employment opportunities are like. In 2021, the four most popular industry sectors in the Burnie LGA were:

- Health Care and Social Assistance sector (1,656 people or 19.0%)
- Retail Trade sector (1,039 people or 11.9%)
- Education and Training sector (704 people or 8.1%)
- Manufacturing (675 people or 7.8%).

Combined, the top four industries employed 4,074 people, or nearly 50% of the working population. It is noted that these include Burnie LGA residents and those living elsewhere. A full industry breakdown for the Burnie LGA is shown in Table 9.

The ABS census data also provides insights into the types of occupations that people have. The occupation data outlines the occupations in which residents work, noting they may be residing in the Burnie LGA or elsewhere. Occupation data is influenced by the economic base and employment opportunities in the area, education levels, and the working and social aspirations of the population. It can tell us a lot about the socio-economic status and skill base of an LGA.

In 2021, the most widely held occupations in Burnie were:

- Professionals (1,394 people or 16%)
- Community and personal service workers (1,275 people or 14.6%)
- Technicians and trades workers (1,259 people or 14.4%)
- Labourers (1,144 people or 13.1%).

These four occupations accounted for 5,072 people or 58.1% of the employed resident population. Between 2016 and 2021, the largest changes in the occupations of residents in the Burnie LGA were for those employed as Community and personal service workers (+303 people), Professionals (+277 people), Technicians and trades workers (+166 people) and Machinery operators and drivers (+152 people).

Table 9 Industry breakdown

Industry	Burnie (2011)		Burnie (2016)		Burnie (2021)		Burnie (change from 2016 to 2021)	
	Persons	%	Persons	%	Persons	%	Persons	%
Agriculture, Forestry and Fishing	228	2.9	284	3.7	330	3.8	102	44.7%
Mining	335	4.2	258	3.4	371	4.3	36	10.7%
Manufacturing	969	12.1	665	8.7	675	7.7	-294	-30.3%
Electricity, Gas, Water and Waste Services	67	0.8	70	0.9	60	0.7	-7	-10.4%
Construction	495	6.2	485	6.3	566	6.5	71	14.3%
Wholesale Trade	263	3.3	169	2.2	302	3.5	39	14.8%

Industry	Burnie (2011)		Burnie (2016)		Burnie (2021)		Burnie (change from 2016 to 2021)	
Retail Trade	1,074	13.5	1,017	13.3	1,039	11.9	-35	-3.3%
Accommodation and Food Services	571	7.2	618	8.1	634	7.3	63	11.0%
Transport, Postal and Warehousing	382	4.8	403	5.3	439	5	57	14.9%
Information Media and Telecommunications	81	1	69	0.9	62	0.7	-19	-23.5%
Financial and Insurance Services	145	1.8	113	1.5	132	1.5	-13	-9.0%
Rental, Hiring and Real Estate Services	77	1	76	1	87	1	10	13.0%
Professional, Scientific and Technical Services	231	2.9	228	3	254	2.9	23	10.0%
Administrative and Support Services	293	3.7	339	4.4	228	2.6	-65	-22.2%
Public Administration and Safety	593	7.4	450	5.9	492	5.6	-101	-17.0%
Education and Training	635	8	616	8	704	8.1	69	10.9%
Health Care and Social Assistance	1,022	12.8	1,181	15.4	1,656	19	634	62.0%
Arts and Recreation Services	45	0.6	39	0.5	55	0.6	10	22.2%
Other Services	349	4.4	329	4.3	377	4.3	28	8.0%
Inadequately described or not stated	128	1.6	257	3.4	248	2.8	120	93.8%

3.6 Journey to work

On census day in Burnie in 2021, 76.1% of people travelled to work in a private car, 1.2% took public transport and 3.5% rode a bike or walked; 4.9% worked at home. It is noted that the census occurred when COVID-19 was still prevalent, and many workplaces required employees to work from home if possible. For these reasons, the data may not be reflective of the current situation. However, in saying that, the statistic only varied slightly from the 2016 data, when 76.3% of people travelled to work in a private car.

Journey to work data from the 2021 census shows that 75% of workers travel to work within the Burnie LGA, followed by:

- Waratah-Wynyard – 11.3%
- Central Coast – 6.1%
- Devonport – 3.9%

3.7 Agricultural industry

In Australia, Australia's agriculture accounts for 55% of Australian land use, a total of 427 million hectares[11] (excluding timber production). It accounted for 24% of water extractions, 11.6% of goods and services exports, and 2.4% of value add (gross national product), and 2.5% of employment in 2021-22. Given agriculture accounts for over half of Australia's land use, the sustainable management of this land is critical for farm businesses and the general public. Favourable conditions for the industry led to record-breaking production in recent years, with the gross value of the industry increasing by 59% in the past 20 years, and it is anticipated that 2023 will result in the sector achieving its highest gross value of production of $90 billion[12].

The 2021 ABS census indicated that 2.0% of all employed people in Australia were employed in the agricultural sector, and the number of people working in agriculture increased by 4.7% between 2016 and 2021. Of the agricultural workforce in 2021, 81% live in regional areas, 68% worked full-time, the median age was 50, 25% were under the age of 35, and 33% were an owner/manager of an enterprise[13]. The report indicates that the workforce is steadily growing and changing, and that there are more women and young people joining the sector.

In the Burnie LGA, there is 61,274 ha of land zoned Agriculture, or 25.7% of the total land area of the LGA; as shown in Figure 14. It is noted that there is less valuable agricultural land zoned Rural in the LGA, and land zoned Rural for forestry purposes. There are 330 people or 3.8% of the working population that are employed in the Agriculture, Forestry and Fishing industry in the Burnie LGA. This is considerably fewer people, proportional to the population reflective of the Burnie LGA being city-centric, compared to nearby LGAs on the Cradle Coast. In Circular Head, 24.3% of employed residents work in the Agriculture, Forestry and Fishing industry, 6.7% in Waratah-Wynyard, 7.3% in Central Coast, and 6.1% in Devonport. However, there does appear to be growth in the industry in Burnie, as the sector has increased from 2.9% in 2011, 3.7% in 2016, to 3.8% in 2021.

Of the people employed in the Agriculture, Forestry and Fishing industry in the Burnie LGA[14]:

- 88% of people work in Agriculture (56%) and Forestry and Logging (32%)
- 75% identify as male
- 25% worked more than 50 hours in a week; and 56% of people worked more than 40 hours in a week
- 41% of those employed in the industry are managers, followed by labourers (20%) and clerical and administrative workers (14%).

[11] Australian Government Department of Agriculture, Fisheries and Forestry, Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) Snapshot of Australian Agriculture 2023
[12] ABARES Snapshot of Australian Agriculture 2023
[13] Australian Government Department of Agriculture, Fisheries and Forestry, ABARES Snapshot of Australian Agricultural Workforce 2023
[14] ABS census data 2021

Figure 14: Agricultural land map

3.8 Activity centre network

The CCRLUS identifies the importance of identifying activity centres in the Cradle Coast region, as it encourages types of activities to co-locate under a designated hierarchy in which settlement centres are identified by size, type, location and description. Establishing an activity centre hierarchy allows for the encouragement and discouragement of actions that are not consistent with the model, improving the delivery and efficiency of infrastructure and services to the resident population.

The activity centre hierarchy for Burnie is provided below in Table 10. While the activity centres are described in a hierarchy of importance, in practice they work as a network servicing a broader population centre with a continuum of size and function, so that each centre can deliver community requirements in a manner which is complementary. That is, the needs of the resident and catchment population of that centre, together with the Cradle Coast region more generally, can be met efficiently when the activity centres function as a sustainable network.

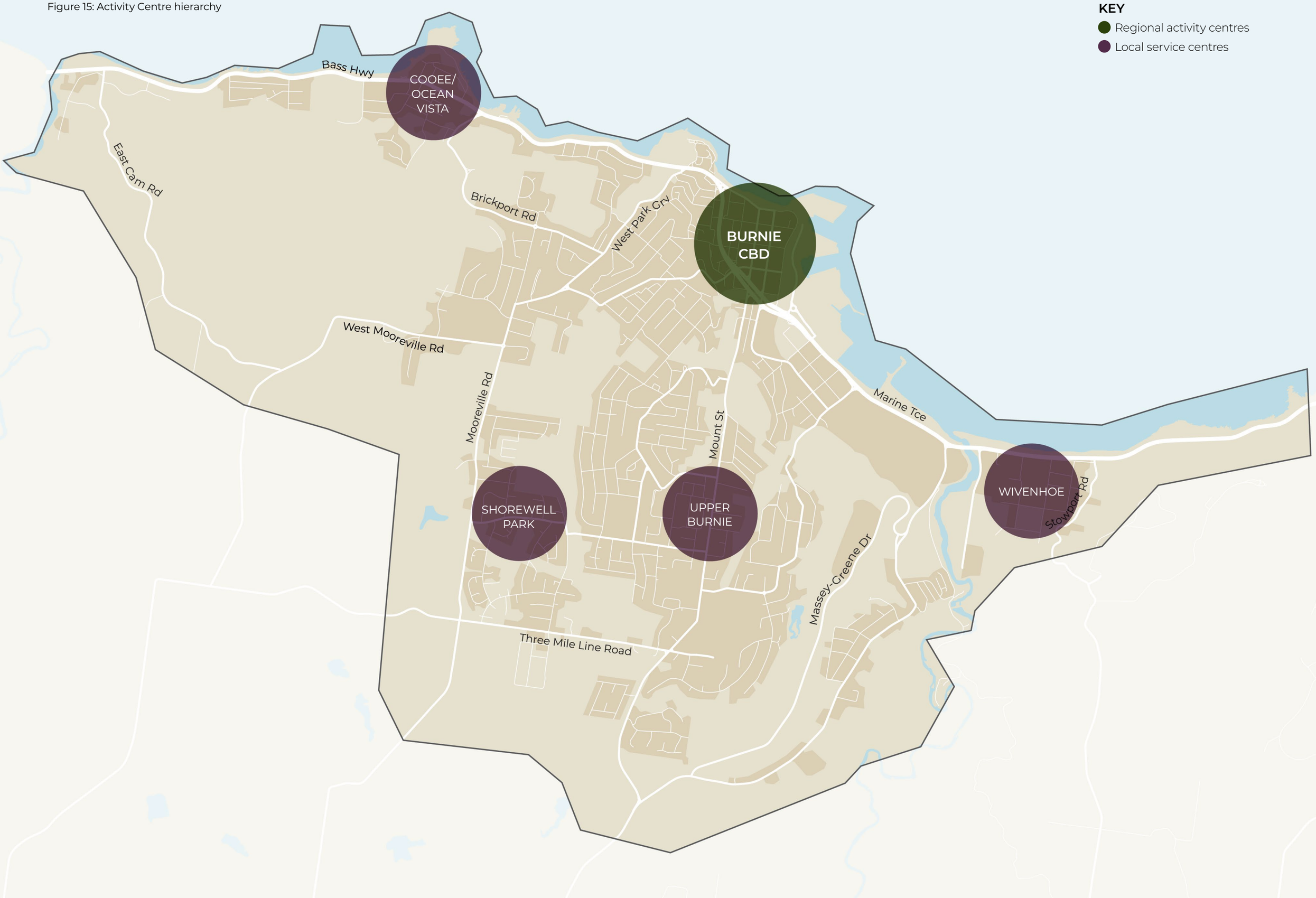
The five key activity centres identified for the study area in Burnie are: Burnie CBD, Upper Burnie, Wivenhoe, Cooee/Ocean Vista, and Shorewell Park. Refer to Table 10. Burnie CBD is an established Regional Activity Centre and is currently recognised as such in the CCRLUS. Upper Burnie and Wivenhoe act as Local Service Centres and have solidified this role in the past few years through growth in retail and community services that support the local area. Shorewell Park and Cooee/Ocean Vista are establishing themselves as Local Service Centres and their roles will become more important as population growth occurs in those catchment areas.

Table 10 Activity Centre hierarchy

Activity Centre type	Description per the CCLRUS	Centre in LGA	Response
Regional Activity Centre	Provide services and facilities which deliver for needs of the local community together with a wider regional or subregional catchment.	Burnie CBD	The Regional Activity Centres in Cradle Coast are in Burnie and Devonport.
District Activity Centre	These towns have a larger population base for a discrete part of the Region providing services and facilities which meet the needs of the local community and an immediate discrete hinterland and may also contain some activity which is of a regional scale. These towns offer a range of services in education, health, culture and entertainment, community support, and personal service. Comparison retail options where sustainable service levels can be supported across a number of sites. District centres are to offer a range of employment and business opportunities.	There are no District Activity Centres in the Burnie LGA	It is unlikely that any Local Service Centres (see below) will become District Activity Centres as they may then start to undermine Burnie's role as a Regional Activity Centre.
Local Service Centre	Local centres are of varying population size and cater primarily to the immediate needs of the local community in housing, education, health, culture and entertainment, community support, personal service,	Upper Burnie, Wivenhoe, Cooee/Ocean Vista, and Shorewell Park	These activity centres aren't currently identified in the CCRLUS; however, the role that they play in the Burnie LGA are as Local Service Centres.

Activity Centre type	Description per the CCLRUS	Centre in LGA	Response
	and convenience retail options at a level which does not service a regional or sub-regional population. Employment and business options are sized and orientated to the local population. This may involve economic activity dependent on a strategic or resource based need.		
Speciality Centres	Small centres are places which include a singular primary purpose derived from natural attributes of the locality and support resource development or tourism and may support a permanent population unrelated to that activity. Specialty centres also operate as local centres and provide convenience services for the local community.	There are no Specialty Centres in the Burnie LGA	Examples in the CCRLUS include Cradle Village for tourism, and Rosebery and Savage River for mineral extraction.
Localities	Small settlements where limited small-scale convenience retail or community facilities provide a focus for very localised or rural communities.	Ridgley, Natone and Stowport	Through the limited small-scale retail or community facilities they serve the resident population and visitors to the area.

Figure 15: Activity Centre hierarchy



3.9 The visitor economy

The Burnie LGA received 410,000 domestic and international visitors in 2019[15], with 12,000 of these being international visitors. The average length of stay was 3 nights and the average spend per visitor was $192 per trip, $117 per night, and $156 per night on accommodation.

Burnie's primary visitors were domestic day visitors (75%), intrastate overnight visitors (13%), interstate overnight visitors (9%) and international overnight visitors (3%). The main reason to visit was for a holiday (39%), followed by other (25%), visiting friends/relatives (21%), and business (15%).

The primary types of accommodation used by visitors were homes of friends or relatives (39%), a hotel or similar (21%), and other accommodation. The main age group of visitors coming to Burnie are people aged 55+.

In 2021-22, the total tourism sales (including direct and indirect sales) in the Burnie LGA was $186.2 million, which was up from the previous financial year, 2020-21, of $179.5 million[16]. This is reflected by the increase in employment in the tourism sector in 2021-22, increasing to 1,145 jobs from 1,040 jobs the previous financial year. This all resulted in a total value of tourism in the Burnie LGA of $91.0 million, or 6.5% of Tasmania's tourism industry.

The upgrade of the Spirit of Tasmania ferries will be a major project affecting tourism demand and supply in the Burnie LGA; the ferries are expected to be 30% larger, carrying more passengers and vehicles across Bass Strait. The first new ferry is scheduled to begin operations in 2024 and is projected to boost visitor numbers and spending in Tasmania, especially in Burnie and the Cradle Coast region.

Some of the key tourism drawcards in the Burnie LGA are Fern Glade, the Little Penguin observation centre, Emu Valley Rhododendron Gardens, Guide Falls reserve, Burnie Park, Hellyers Road Distillery, the Burnie waterfront and beach, Burnie Regional Museum, and the Makers' Workshop.

The Department of State Growth and Tourism Tasmania are currently implementing an initiative called 'Opening the Gate' to accelerate agritourism in Tasmania. This project works with farmers, food producers and existing agritourism businesses to explore and embrace new agritourism opportunities to diversify, value-add and connect with visitors. An example in Burnie is Hellyers Road Distillery.

3.10 Infrastructure and services

The planning, provision and management of infrastructure, services and facilities are essential considerations in land use planning, and important factors in supporting a liveable and accessible community. Infrastructure includes systems for drainage and disposal of sewage and stormwater; water storage, treatment and supply; waste management; energy generation, transmission and supply; communication and digital information; passenger and freight transport and transit; and associated control facilities. It also includes infrastructure requirements for community service facilities, including for education, health and community care. Community infrastructure may also involve arrangements for access to affordable and accessible housing, to cultural, open space and recreation opportunities, and for protection and conservation of natural and cultural assets.

Integration of the process of planning for settlement growth and development with the process of planning for infrastructure provision must be coordinated and concurrent. This will ensure reliable services are available at appropriate capacity and function to meet current needs and future growth.

[15] Tourism Research Australia Burnie 2019 Local Government Area profile
[16] Data sourced from the National Institute of Economic and Industry Research (NIEIR)

3.10.1 Transportation

The Bass Highway is the main east–west trunk route that provides the primary road transport capacity through the major coastal settlements of the coast. The Bass Highway is a major freight and passenger route, and forms part of the Australian Government's National Land Transport Network.

Burnie is also located at the start of Tasmania's primary freight corridor, extending through to Brighton. TasRail estimates that it hauls around 70% of the contestable freight task across this freight corridor, therefore, it is significant to the freight transportation and industrial sectors of Tasmania. Burnie also comprises TasRail's Bulk Mineral Export Facility and Tasmania's only multi-commodity shiploader, providing storage and shiploading services for the West Coast mines. The shiploader is the only open-access facility of its kind in Tasmania. The Department of State Growth (State Growth) advised that they welcome discussion and collaboration with the Council on the operation and future planning of the State road network through Burnie as part of developing this settlement strategy. State Growth provided the following input for this settlement strategy:

Roads

- The Bass Highway west of Burnie carries a high volume of freight, primarily from agriculture and forestry, and has a high percentage of heavy vehicles. The highway also supports intra-regional travel and local trips. The majority of the Bass Highway through Burnie is a limited access road. Future development adjacent to the limited access parts of the Bass Highway needs to note the restrictions on new and intensified accesses.
- The Cooee to Wynyard Corridor Strategy identifies a program of upgrades on the Bass Highway to improve traffic flows and safety and extend the life of existing road infrastructure. Many of these upgrades are in the process of being delivered.

Port of Burnie

- The Port of Burnie is one of Tasmania's major ports, moving high volumes of containers, forestry and mineral products. TasRail is currently undertaking a $64 million project to replace the minerals loader at the port. Future upgrades to address capacity and infrastructure at the port have been identified as a Priority Initiative on Infrastructure Australia's Infrastructure Priority List.

Rail

- TasRail manages the Western Line from the Port of Burnie to the east. This is an operational line, which connects Burnie Port, a high-volume import and export port, to key population and industrial centres. We encourage Council to engage with TasRail to discuss constraints on land use and development adjacent to the rail corridor.

Burnie is also strongly supported by both passenger transport and freight capacity via the airport at Wynyard (the Burnie Airport). The second nearest airport is located near Devonport and is only a 40-minute drive from Burnie CBD.

By sea, Burnie and Devonport support a daily freight service to Melbourne, and Devonport provides a terminal for the Bass Strait passenger ferry services. Fishing fleet operations also occur from other smaller ports in the region. As detailed in Section 2.4.2 of this report, the Port of Burnie supports a variety of industries in Burnie and the Cradle Coast region and is a vital asset for the City.

Figure 16: Transport and infrastructure map

3.10.2 Stormwater management

Stormwater management is becoming a more significant issue for the Burnie LGA due to an increasing number of storm events, more development occurring in urban areas, and an increasing population. Under the *Urban Drainage Act 2013*, Council has an obligation to provide and manage appropriate stormwater drainage within urban areas of the municipality.

Currently stormwater is managed via roadside drainage and an urban stormwater reticulation network in the Burnie City and in the Ridgley township (the two urban areas in the LGA as defined under the *Urban Drainage Act 2013*). This system comprises open waterways, piped systems, pits for the capture and conveyance of stormwater, ocean and stream outfalls, detention systems, pollution traps and other such devices. Outside the urban areas, Council's role in stormwater management relates primarily to roadside drainage and providing a passage for natural stream and overland flows, where roads intercept.

Council's Stormwater System Management Plan outlines commitments to managing and maintaining the stormwater system to ensure the safety and wellbeing of the community. The plan is currently being reviewed and future priorities are likely to focus on providing connection to unserviced properties and improving environmental management of the waterways that form the backbone of the urban drainage network.

3.10.3 Water supply

Burnie benefits from multiple catchments and high annual rainfall (947 mm[17]). In the wider Cradle Coast area, these are extensively used for hydro-generation, irrigation and urban water schemes. An increasing population and extensive agricultural uses in the LGA drive continued demand for water.

The urban water supply is managed by TasWater, which has responsibility to source, store and treat raw water and distribute it for domestic, commercial and industrial use. There are currently no major constraints associated with urban water storage in Burnie; however, TasWater has advised that some upgrades may be required to water mains, particularly in older parts of Burnie.

The Burnie LGA is supported by a water treatment plant located at Ridgley (called the Burnie Water Treatment Plant), which has capacity for future growth. There is reticulated water supply in Burnie and Ridgley, as shown in Figure 17.

3.10.4 Waste management

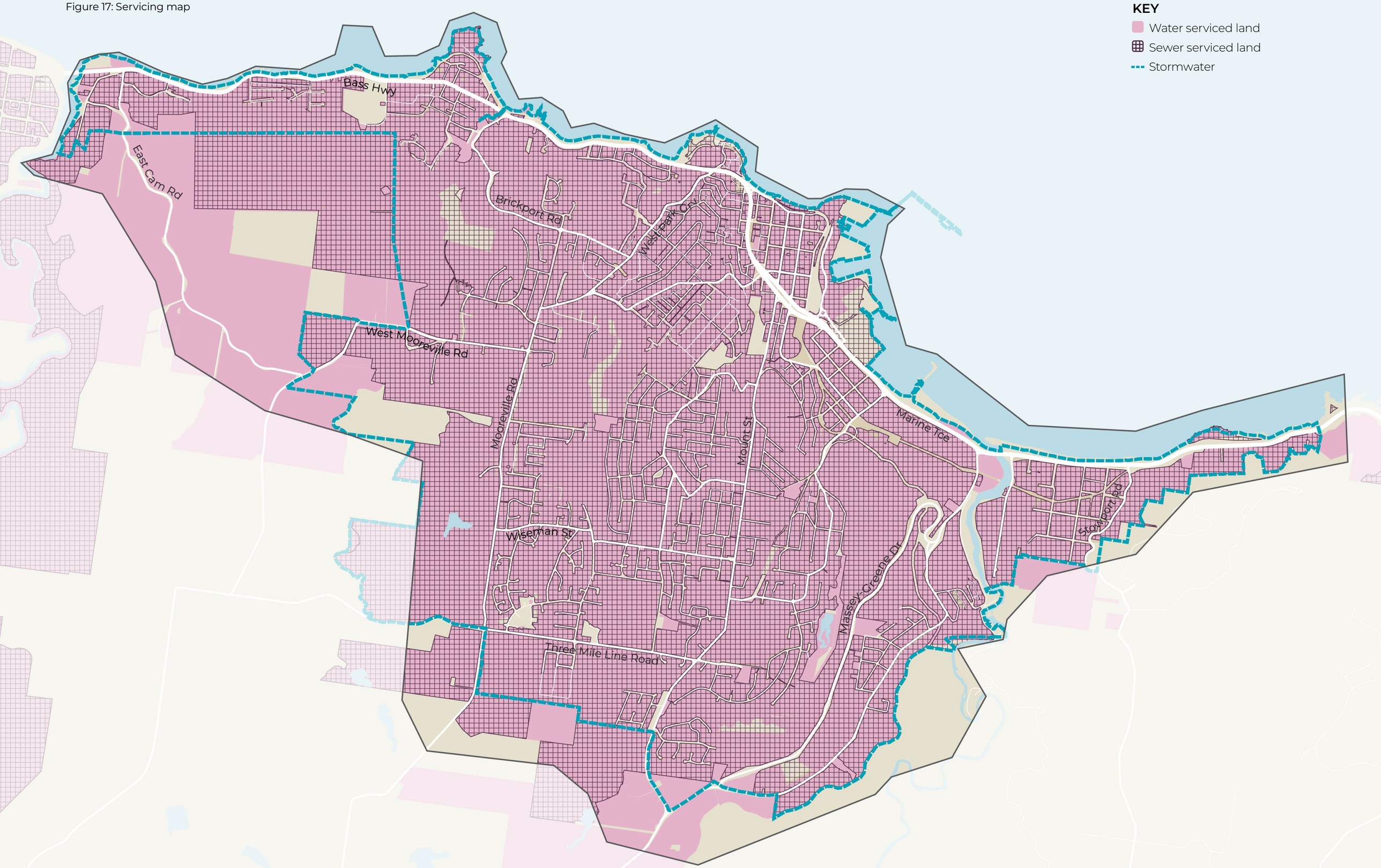
In the Burnie LGA, both Burnie and Ridgley are serviced by full reticulated sewerage infrastructure, as shown in Figure 17.

TasWater has two sewage treatment plants (STPs) within the LGA, located at Round Hill (Burnie STP) and Ridgley (Ridgley STP). The Burnie STP (shown in Figure 16) is currently operating at full capacity and TasWater is currently in the process of identifying a location for a new STP that will treat sewage from Wynyard, Somerset and Burnie. TasWater has also identified that there is a need to upgrade sewer mains in the older parts of Burnie in the near future.

For disposal of hard waste, Council offers kerbside recycling and waste collection in some areas of the LGA. Additionally, the Council runs the Burnie Waste Management Centre which takes various waste, green waste and recycling.

[17] http://www.bom.gov.au/climate/averages/tables/cw_091009.shtml (searched 15 December 2023)

Figure 17: Servicing map



3.11 Community and recreational facilities

An urban facilities map has been prepared for the study area, as shown in Figure 18. It shows that Burnie is well serviced by community services and facilities.

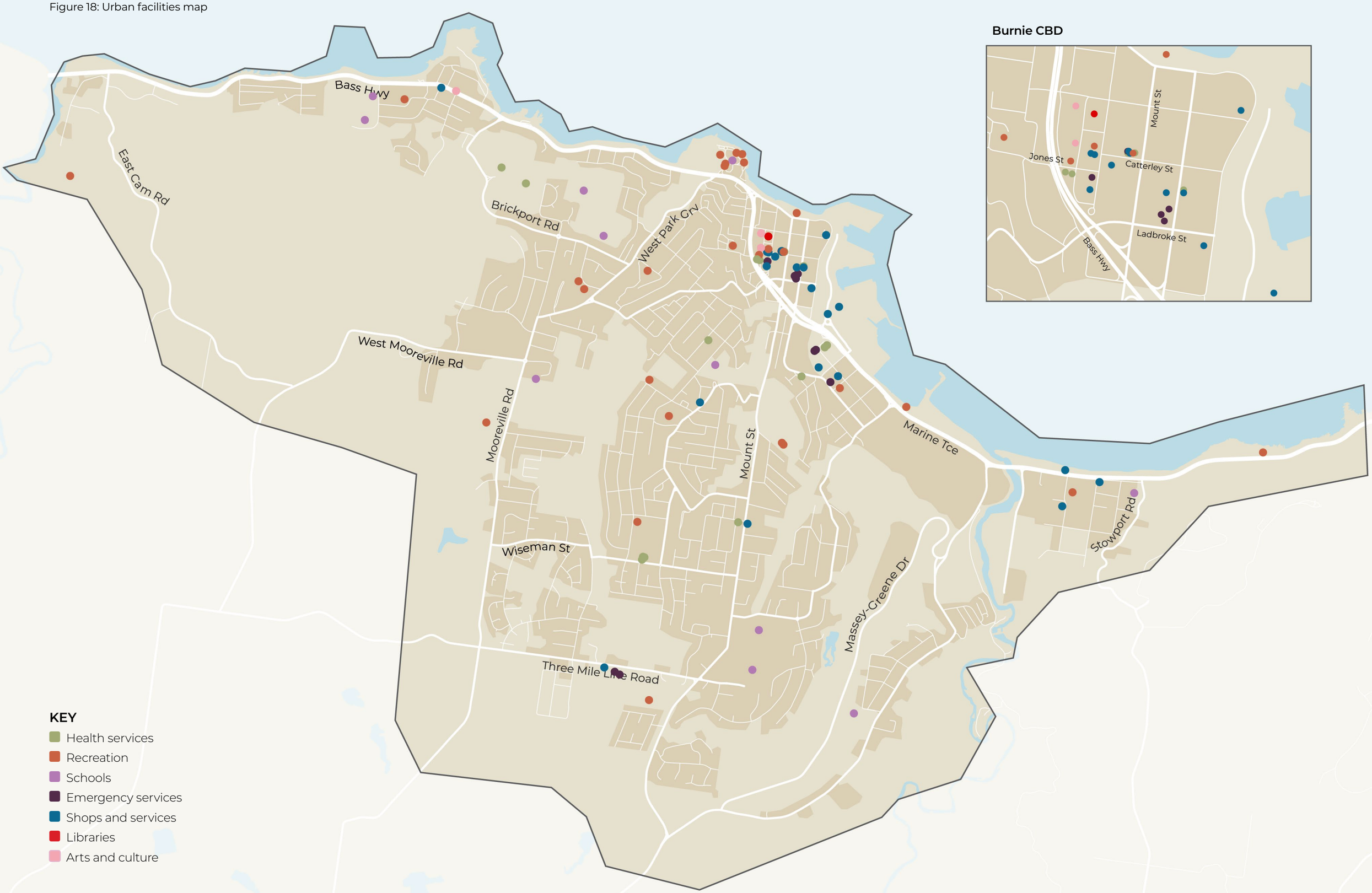
It is likely that most existing community services and facilities are currently sufficient and will continue to be so if well maintained into the future. This particularly applies to:

- Educational facilities
- Open spaces and recreational facilities
- Government health facilities
- Library facilities.

Based on the population and demographic analysis, there is likely to be a need for:

- Mental health support facilities
- Residential aged care facilities.

Figure 18: Urban facilities map



3.12 Physical context

3.12.1 Climate change

Burnie City Council takes an active interest in the changing climate, and its plans and strategies are underpinned by mitigation and adaptation strategies for the community to manage and respond to climate change impacts. The Council takes guidance and advice from government bodies, including the National Climate Change Authority, the Climate Change Office in Renewables, Climate and Future Industries Tasmania (part of State Growth) and Cradle Coast Natural Resource Management. The Council has specific strategies for waste management, flood management, environmental management and emergency management to address climate change issues, and community initiatives to encourage sustainable living and minimising impacts on the environment. New developments are managed via land use planning and compliance with the National Construction Code.

A settlement strategy does not encourage development in areas at risk, especially in relation to sensitive uses. However, if appropriate, development can occur in areas at risk if mitigation measures are implemented to reduce the risk exposure to acceptable levels. It also should be ensured that infrastructure and services that service a wider area are not exposed to unacceptable levels of risk.

3.12.2 Flooding and coastal inundation

There are three major rivers in the Burnie LGA. The Cam River and Blythe River form the western and eastern LGA boundaries, and the Emu River passes through the middle of the two.

The northern part of the Emu River, from Fern Glade to the mouth of the river, is identified as flood-prone and has been known to flood in recent years. The Emu River was significantly impacted by the June 2016 floods, when River Road in Wivenhoe became inundated. Logs and tree debris that had been carried down the river also built up behind the railway bridge and then blocked the mouth of the river[18]. In addition, Cooee Creek, Shorewell Creek, Whalebone Creek and Romaine Creek are also identified as being flood-prone. All of these creeks pass through residential areas and therefore, when in flood, have the ability to significantly impact homes. Romaine Creek passes through South Burnie before reaching the coast, and as a result the commercial area between the railway line and Marine Terrace / the coastline is classed as flood-prone. Any new development in this area should be managed appropriately.

The entire stretch of coastline in the Burnie LGA is identified as being prone to coastal inundation, along with the northern stretches of the Cam River, the Emu River and the Blythe River. There is a small area at the Burnie Port that is in a coastal inundation investigation area. These areas require active management to minimise impacts on residents and agricultural land.

It is likely that flooding and inundation events, including coincident events between riverine and coastal inundation, will increase in the future due to a greater number of significant storm events expected because of climate change. While current coastal inundation has factored in the additional risk from climate change, riverine flooding does not. Spatial planning around coincident events has also not yet occurred.

3.12.3 Bushfire management

Aside from Burnie and Ridgley, the remainder of the LGA is predominantly considered bushfire-prone land. Given much of the hinterland comprises bushland or agricultural land, this is somewhat expected. Therefore, in addition to the continued reliance on the Bushfire-prone Areas Code for future planning applications, any rezonings should ensure that a best practice, strategic approach is taken to bushfire risk management and the protection of communities. This is becoming a more critical issue to manage with the expected hotter summers in the future as a result of climate change.

[18] Tasmanian Strategic Flood Map – Emu River Catchment Model Calibration Report

3.12.4 Landslip

Given the undulating, and at times steep, topography of the landscape, much of the LGA is in a low or medium landslip hazard band. In some areas, this makes land undevelopable or significantly constrained. Land particularly affected by landslip includes land alongside the Emu, Blythe and Cam rivers that intersect the LGA and land near waterways, such as Chasm Creek, Romaine Creek, Alexander Creek, Whalebone Creek, Shorewell Creek, Cooee Creek and Messengers Creek.

3.12.5 Coastal erosion

Coastal erosion is a known issue in South Burnie alongside Marine Terrace, in Burnie adjacent to North Terrace, and along the coastline between Cooee and the Cam River. There are some small pockets also under investigation at Camdale, in Burnie, near the entrance to the Burnie Port, along Marine Terrace and the mouth of the Emu River, and at the mouth of the Blythe River. Climate change is likely to result in sea level rise, which will continually have a greater impact on coastlines and waterways.

Figure 19: Hazards map

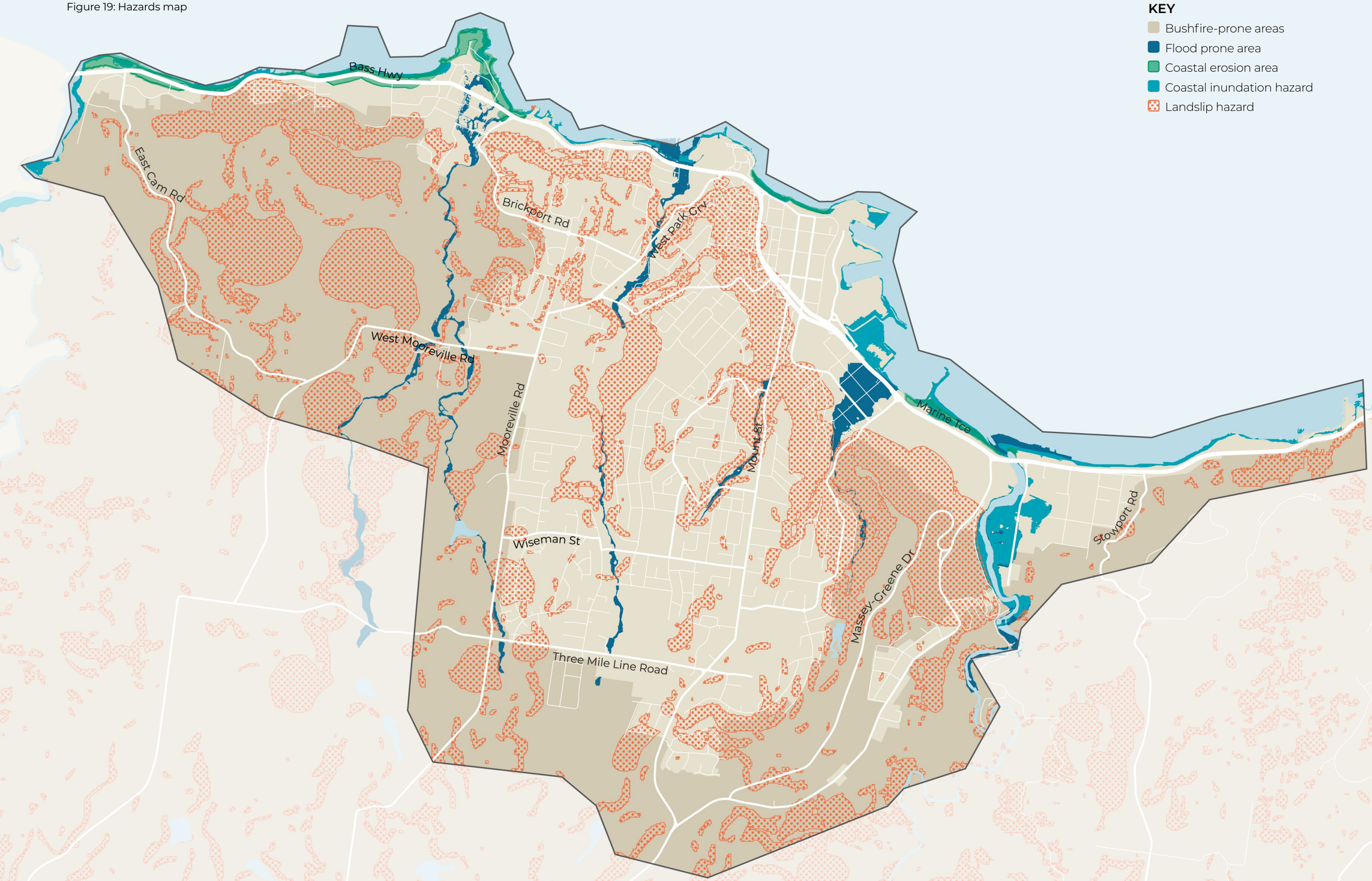
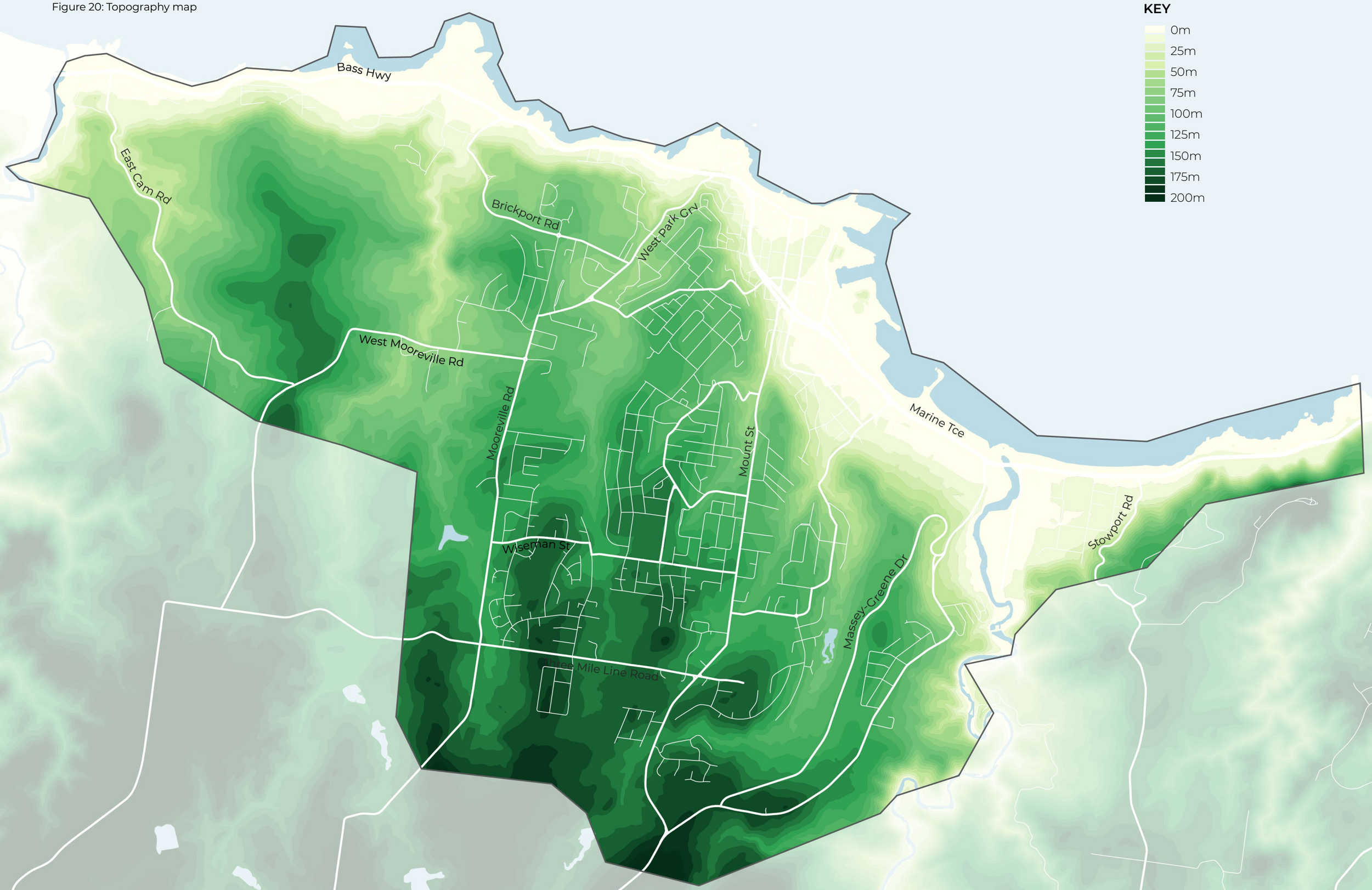


Figure 20: Topography map



3.13 Natural values, recreation and open spaces

As a regional city, Burnie has a vast array of services and facilities that support the residents of Burnie and surrounding settlements. The provision of recreational facilities, open space and natural areas is essential to support the overall health and wellbeing of a community and improve the liveability of an area. Well-planned and designed open spaces and recreational facilities also provide broader social, economic and environmental benefits for the community. In Burnie, existing spaces for the community to enjoy include the Burnie waterfront and local beaches, the Burnie Park, Fern Glade, the network of footpaths and walking trails in the region, the numerous sporting facilities, along with reserves and bushland. These are shown in Figure 21.

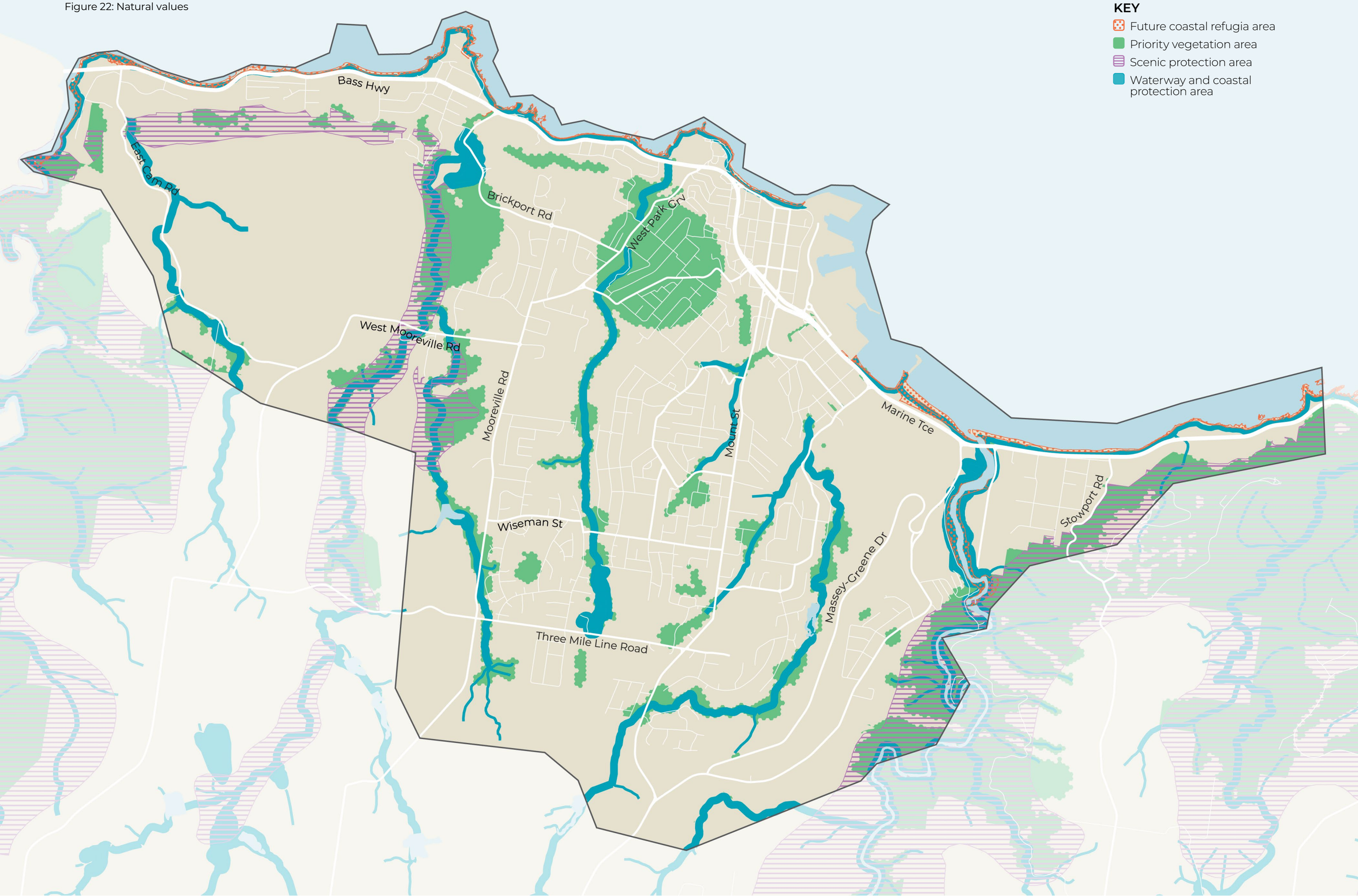
The Greater Burnie area is located on the coast of Bass Strait and is where most of the Burnie LGA population reside, in the coastal towns stretching from Chasm Creek to the east and Camdale to the west. Agricultural land sits behind the urban residential development of Burnie, predominantly outside Greater Burnie, surrounding Ridgley and other inland settlements, and extends as far south as Hampshire. There is limited native vegetation located on the agricultural land due to it being used for agricultural activities for many years. Outside the agricultural land is typically highly vegetated land. Land in the south-eastern portion of the LGA is mostly in a regional reserve, a conservation covenant, or permanent timber production zoned land.

The Burnie LGA hinterland is significantly vegetated, comprised of a diverse range of vegetation communities. These include *Eucalyptus obliqua* forest, *Nothofagus* rainforest, *Nothofagus–Atherosperma* rainforest, *Eucalyptus delegatensis* forest, *Acacia melanoxylon* forest, plantations for silviculture, *Eucalyptus amygdalina* coastal forest and woodland, and *Eucalyptus regnans* forest, to name a few.

The Burnie LGA has a number of threatened species that are known to be present. Threatened flora include crowded leek-orchid, riverbed wintercress, grassland greenhood, slender waterpepper, lanceleaf beardheath and small-leaf glycine. Some of the threatened fauna species present, are Tasmanian devil, eastern quoll, shy albatross, wedge-tailed eagle, swift parrot, white-bellied sea eagle, grey goshawk, giant freshwater crayfish, and the spotted-tailed quoll. Refer to Figure 22.

Figure 21: Open space map

Figure 22: Natural values



4 Burnie in the future

To adequately plan for the Burnie LGA in the future, an analysis of demographic data and trends has been undertaken to determine the predicted requirements for residential, commercial and industrial land. Reviewing supply data and determining what the demand will be in the future will provide guidance for future use and development in Burnie for the next 20 years.

Population projections prepared by the Tasmanian Department of Treasury and Finance (DoTF)and the Australian Government's Centre for Population are provided below. Population projections provide an indication of what Burnie's population will look like if demographic trends and patterns are held true into the future. They predict not only the number of people, but the age profile, and how this may change over time, and are therefore key in planning for services and infrastructure.

The current supply and the anticipated demand of residential, commercial and industrial land have also been determined using population projections and approval data provided by Council. Accepted planning practice is to provide an approximately 15-year rolling land supply to support compact settlements and provision of sustainable and efficient infrastructure. The CCRLUS requires a minimum 10 year and maximum 20 year land supply.

4.1 Population projections

To adequately plan for the future needs of the Burnie LGA's population, six scenarios have been considered in relation to population projections and dwelling demand:

1. Tasmanian Treasury high growth scenario[19]
2. Tasmanian Treasury medium growth scenario[20]
3. Centre for Population scenario
4. REMPLAN scenario
5. ABS high growth scenario
6. Historical growth rate

These projections are all for the Burnie LGA, not specifically Greater Burnie.

4.1.1 Tasmanian Treasury high and medium growth scenarios (2023 data)

The DoTF has prepared population projections for Tasmanian LGAs since 2009 and releases them every five years after data from each ABS Census of Population and Housing is released. Draft population projections based on the latest census data were released in November 2023 and will be relied on for the Burnie settlement strategy. The draft projections provide an indication of the size and composition of the population of Tasmania and its 29 LGAs for a 30-year period, from 2022-23 to 2051-52. The projections have three series based on different population growth assumptions – high, medium and low.

There are, however, limitations associated with these population projections. Conditions have been rapidly changing in recent years, and the DoTF highlights that the projections do not consider the demographic impacts of government policy and should not be used as a standalone decision-making tool.

Under the high growth scenario, compared to 2021-22 ABS estimates, DoTF assumes an increased mortality rate, fertility rate, net overseas migration rate and net interstate migration, resulting overall in an increasing

[19] Based on DoTF 2023 draft population projections released November 2023
[20] Based on DoTF 2023 draft population projections released November 2023

population. For comparison, the population projections for Waratah-Wynyard, Central Coast and Devonport have been provided in addition to Burnie.

The high growth scenario projects that Burnie's population will continually increase from 2022 to 2042 at an annual average growth rate of 1.64% resulting in a 7.2% overall population growth. Waratah-Wynyard, Central Coast and Devonport are also all predicted to experience strong, steady growth. Refer to Table 11.

Table 11 Tasmanian Treasury high growth scenario from 2022-2042 (Source: Tasmanian Treasury data 2023)

LGA	2022	2032	2042	AAGR from 2022 to 2042	20-year overall growth rate
Burnie	20,472	21,243	21,944	1.64%	7.19%
Waratah-Wynyard	14,689	15,228	15,716	1.60%	6.99%
Central Coast	23,345	24,550	25,676	2.29%	9.99%
Devonport	26,937	28,338	29,648	2.31%	10.06%

The populations under the medium growth scenario show considerably less growth than under the high growth scenario. Burnie will experience a slight population increase from 2022 to 2032, and then decline to levels below 2022 in 2042. A similar trend is projected for Waratah-Wynyard; however, steady growth is predicted for Central Coast and Devonport. Refer to Table 12.

Table 12 Tasmanian Treasury medium growth scenario from 2022-2042 (Source: Tasmanian Treasury data)

LGA	2022	2032	2042	AAGR from 2022 to 2042	20-year overall growth rate
Burnie	20,472	20,530	20,352	- 0.28%	- 0.59%
Waratah-Wynyard	14,689	14,717	14,576	- 0.33%	- 0.77%
Central Coast	23,345	23,726	23,814	0.35%	2.01%
Devonport	26,937	27,388	27,498	0.37%	2.08%

The rise of renewable energy and agriculture can attract new residents and retain existing ones by creating jobs and driving economic development. Should these sectors experience growth in the next 20 years it may impact on the population projections by the Tasmanian Treasury.

4.1.2 Centre for Population growth scenario

The Australian Government's Centre for Population released the 2022 population statement in January 2023, projecting a higher growth scenario for Tasmania arising from a proportional increase in allocation of net overseas migration.

The Centre for Population provides two population projections for Tasmania: Greater Hobart and the Rest of Tasmania. The population statement indicated that the population of Tasmania on 30 June 2021 was 586,000, which was revised up by 4.9% after the 2021 census. The report states that for the Rest of Tasmania, growth is projected to be 1.2% in 2021-22, before falling to 0.7% in 2023-24 and sustaining this 0.7% growth rate through to 2032-33. This is an average annual growth rate of 0.79% over the next 11 years to 2033, peaking at a total Rest of Tasmania population of 348,000.

The Centre for Population growth scenario has assumed that the Rest of Tasmania growth rate (annual average 0.79% growth to 2033) applies to Burnie. This projection diverges from those of the Tasmanian Treasury, predicting higher growth than even the high growth scenario. Refer to Table 13.

Table 13 Centre for Population growth scenario for Burnie LGA from 2022-2032 (Source: Centre for Population)

Scenario	2022	2023	2032	2042	AAGR from 2022 to 2032	10-year overall growth rate
Centre for Population	20,472	20,650	22,080	Not modelled	0.79%	7.85%

4.1.3 REMPLAN scenario

REMPLAN are currently undertaking research into residential supply and demand within Tasmania. The data generated through these studies will help inform the future regional land use strategies for Tasmania. As part of this work REMPLAN has prepared population projections and housing demand data over the next 20 years for Burnie as part of a regional supply and demand analysis. These regional-level forecasts facilitate evidence-based decision making for strategic planning, land supply, service provision and infrastructure in LGAs.

The REMPLAN scenario indicates that Burnie will experience an overall population growth rate of 10.2% from 2022 to 2042.

Table 14 Centre for Population growth scenario for Burnie LGA from 2022-2032 (Source: Centre for Population)

Scenario	2022	2032	2042	AAGR from 2022 to 2042	20-year overall growth rate
REMPLAN	20,497 [21]	21,599	22,588	0.48%	10.20%

4.1.4 ABS growth scenario

The ABS uses the 'cohort-component' method for producing population projections. In this method, assumptions made about future levels of fertility, mortality, overseas migration, and internal migration are applied to a base population (applied by sex and single year of age) to obtain a projected population for the following year. The assumptions are then applied to this new (projected) population to obtain a projected population for the year after that. This process is repeated until the end of the projection period is reached. From a base of 30 June 2022, the projections span the period 30 June 2023 to 30 June 2071 for Australia, states, territories, capital cities and rest of state. The projections include high, medium and low series.

By 2071, Tasmania's population of 571,000 people is projected to increase to 843,300 under the high series and 609,900 under the medium series and decline to 425,400 under the low assumption. Under all assumptions, the number of deaths will exceed births for most years, leading to a natural decrease for Tasmania for these years and therefore a reliance on migration for growth.

Under this high growth scenario, Tasmania is predicted to have an annual average growth rate of 1.02%. Applying this rate to Burnie results in an overall population growth of 4,513 people from 2022 to 2042. Refer to Table 15.

Table 15 ABS 2023 population projections for Burnie LGA from 2022-2042 (Source: ABS 2023)

[21] Note that this population total for Burnie is slightly higher than the actual population from the census that is used in the other scenarios as it was a forecast from when the REMPLAN data was produced in 2021.

Scenario	2022	2032	2042	AAGR from 2022 to 2042	20-year overall growth rate
ABS population projections (high growth scenario)	20,472	23,036	24,985	1.02%	22%

4.1.5 Historical growth scenario

The historical growth scenario considers past yearly overall population numbers in Burnie to determine previous growth rates and has been used to indicate what future growth in Burnie might be. Between 2012 and 2016 the growth rate was negative; however, Burnie then experienced a period of strong growth between 2017 and 2021. Refer to Table 16.

Table 16 Population changes in Burnie LGA between 2012 and 2022 (Source: ABS population data)

Year	Population	Change in number	Change in percent
2012	19,981	-183	-0.91
2013	19,755	-226	-1.13
2014	19,565	-190	-0.96
2015	19,408	-157	-0.8
2016	19,228	-180	-0.93
2017	19,354	126	0.66
2018	19,601	247	1.28
2019	19,899	298	1.52
2020	20,171	272	1.37
2021	20,408	237	1.18
2022	20,472	64	0.31

It is assumed that Burnie will continue to experience positive population growth, and the average annual growth rate has been taken from the years Burnie experienced positive population growth, from 2017 to 2022. Based on this, the average annual growth rate is 1.05%. This has been used to predict the population in 2032 and 2042 in Table 17.

Table 17 Historical growth scenario population projections for Burnie LGA from 2022-2042 (Source: ABS data)

Scenario	2022	2032	2042	AAGR from 2022 to 2042	20-year overall growth rate
Historical growth rate	20,472	22,726	25,228	1.05%	23%

4.1.6 Population projections summary

Population projections are indications of how an area may grow, and it is important that a range of scenarios are considered and planned for so that the settlement strategy is appropriately responsive in the future and does not become an impediment in the planning system.

The population projection scenarios considered result in significant variation on how much the population will increase in Burnie. This is because of different assumptions in each scenario. There are minor population increases projected for Burnie under the Tasmanian Treasury high growth scenario, a slightly greater increase under the REMPLAN and Centre for Population scenarios, and the largest increases based on the historical growth rate and the ABS population projections.

There is a slight population decline under the Tasmanian Treasury medium growth scenario. The population decline is predicted to arise due to an ageing population, low fertility rates and low migration rates.

The population projections do not, however, take into account major employment-generating projects that could be progressed in Burnie and the North-West region. These include the Marinus Link, the e-fuel plant, wind farms, and job demand in existing employment industries such as the Port of Burnie and Elphinstone. Increased employment opportunities in the LGA will likely attract more people to live in the area.

All population projections considered for the settlement strategy are shown in Figure 23.

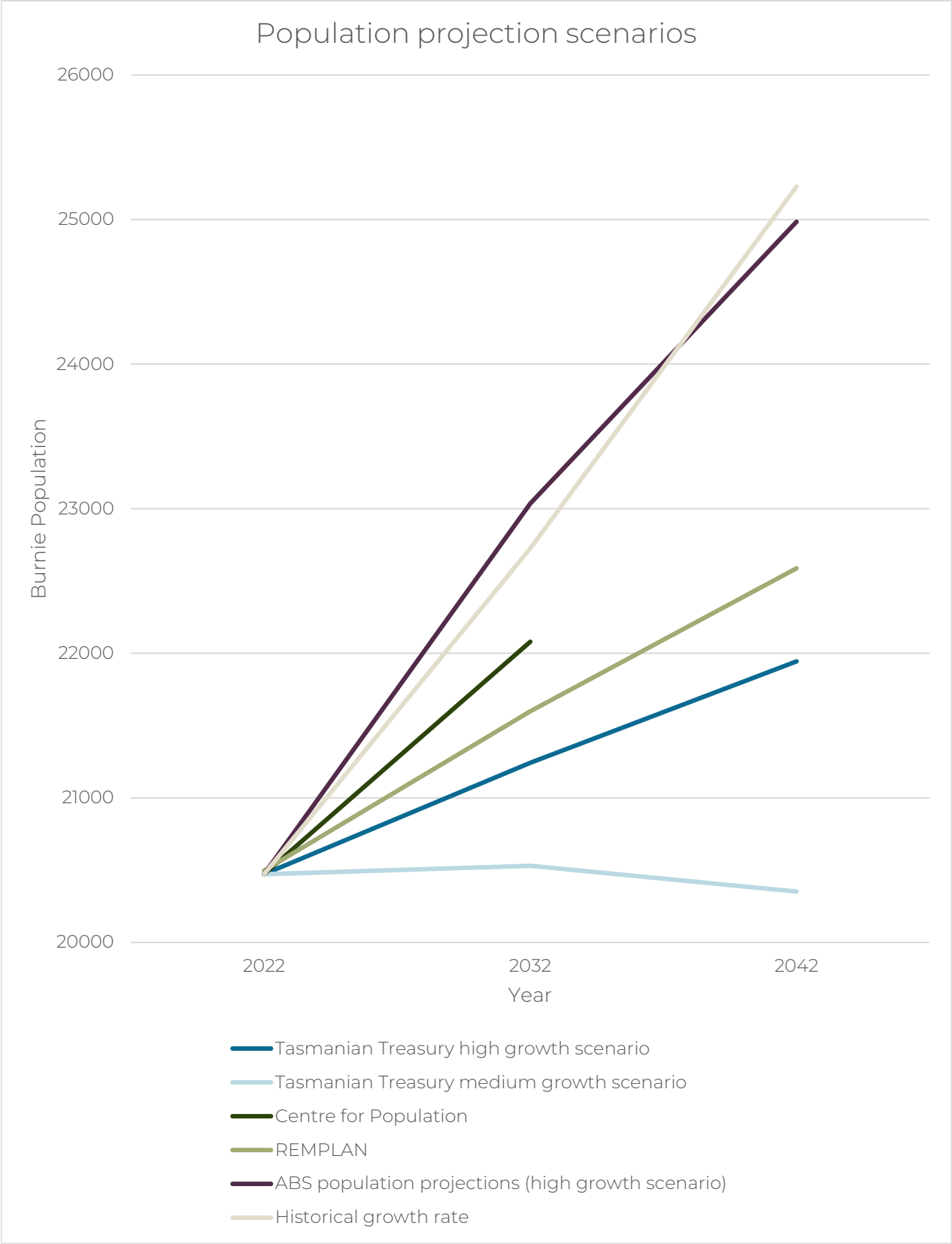


Figure 23 The population projection scenarios for Burnie

4.2 Housing demand

Demand for residential land and housing is driven by expected changes in population and demographic characteristics. A combination of data from Council, the Tasmanian Government, the Australian Government and the ABS has been used to understand the projected dwelling demand in Burnie in the future. The same scenarios used for the population projections have been used to determine housing demand based on the determined population growth rates.

It is important to note that none of the population projections or dwelling demand scenarios provided below consider the substantial number of direct and indirect jobs that will be generated in association with the renewable energy projects that are coming to the region. This is a recognisable flaw, and it is likely that the housing demand that is actually required in Burnie over the next 20 years is a lot greater than what the data below is showing.

4.2.1 Tasmanian Treasury high and medium growth scenarios

Under the high growth scenario, the following results are projected[22]:

- Dwelling demand will steadily increase from 2022 to 2042, and there will be an overall demand during this period of 110 houses.
- In 2021 there were 9,243 dwellings, and dwelling demand will increase to a peak of 9,353 dwellings in 2042. This will be an annual average growth rate of 0.1% for all types of dwellings.
- The greatest demand is for attached dwellings, with an increased demand of 316 dwellings from 2022 to 2042. Interestingly, the demand for separate houses is anticipated to decline by 131 houses from 2022 to 2042.
- The greatest demand in terms of dwelling size will be 2-bedroom dwellings, with a demand of 377 from 2021 to 2041. The housing type next most in demand will be 4-bedroom dwellings, followed by 1-bedroom dwellings. The demand for 3-bedroom dwellings will steadily decline over this 20-year period, declining by 767.

The medium growth scenario was not modelled due to the anticipated decline in population between 2022 and 2042. This would result in no new demand for dwellings.

4.2.2 Centre for Population growth scenario

Under the Centre for Population scenario there is an estimated increase of 1,608 people between 2022 and 2032. Based on the average household occupancy level in Burnie of 2.3 people, this roughly equates to a dwelling demand of an additional 699 houses over the next 10 years. There is no data for 2042, therefore dwelling demand over the next 20 years cannot be determined.

4.2.3 REMPLAN scenario

REMPLAN data predicts a population increase of 2,091 between 2022 and 2042. During this 20-year period, they are predicting that Burnie will require an additional 1,319 new dwellings to support the increased population. This equates to an average of 66.0 new dwellings per year between 2022 and 2042.

4.2.4 ABS high growth scenario

Compared to the previous scenarios, the ABS high growth scenario population projections between 2022 and 2042 are significantly higher for Burnie. Based on the predicted growth rate by the ABS and applying it to Burnie, the LGA would see an overall population growth of 4,513 people from 2022 to 2042. Based on the

[22] SGS Housing Demand Model prepared for the Circular Head settlement strategy 2023

average household occupancy level in Burnie of 2.3 people, this roughly equates to a dwelling demand of an additional 1,962 houses over the next 20 years, or nearly 100 houses per year.

4.2.5 Historical growth scenario

Based on the historical population growth rate for Burnie, this scenario sees the highest population increase of 4,756 from 2022 to 2042. Based on the average household occupancy level in Burnie of 2.3 people, this roughly equates to a dwelling demand of an additional 2,067 houses over the next 20 years.

4.2.6 Dwelling demand summary

The dwelling demand rates in Table 18 apply to the five scenarios. It's noted that the Tasmanian Treasury medium growth scenario has not been included given this predicts negative growth.

Table 18 Dwelling demand summary for the five scenarios (Source: ERA Planning and Environment)

Scenario	Dwelling demand total from 2022 to 2042
Tasmanian Treasury high growth scenario	5.5 houses per year
Centre for Population scenario	69.9 houses per year (between 2022 and 2032, noting there is no modelling available for 2023 to 2042)
REMPLAN scenario	66.0 houses per year
ABS growth scenario	98.1 houses per year
Historical growth scenario	103.3 houses per year

4.3 Housing yield

Table 19 shows the residential land supply in Burnie and theoretical dwelling yields in residential zones, along with an estimated number of years supply under the five scenarios.

Table 19 Residential land supply (Source: ERA Planning and Environment, The LIST)

Zone	Vacant area (ha)	No. of vacant lots	Theoretical dwelling yield	Estimated years supply (high growth scenario)[23]	Estimated years supply (Centre for Population scenario)[24]	Estimated years supply (REMPLAN scenario)[25]	Estimated years supply (ABS growth scenario)[26]	Estimated years supply (historical growth scenario)[27]
General Residential[28]	176.23	522	2200	400.0	31.5	33.3	22.4	21.3
Village[29]	7.60	19	98	17.8	1.4	1.5	1.0	0.9
Low Density Residential[30]	9.53	10	35	6.4	0.5	0.5	0.4	0.3
Rural Living A[31]	42.62	25	30	5.5	0.4	0.5	0.3	0.3
Rural Living B[32]	7.32	6	2	0.4	0.0	0.0	0.0	0.0
TOTAL	**243.30 ha**	**582 lots**	**2,365 dwellings**	**430 years**	**34 years**	**36 years**	**24 years**	**23 years**

[23] Based on the Tasmanian Treasury high growth scenario which assumes 5.5 dwellings per year over the next 20 years
[24] Based on the Centre for Population scenario which assumes 69.9 dwellings per year over the next 10 years (noting that there are no projections for 2031 to 2042)
[25] Based on the REMPLAN scenario which assumes 66.0 dwellings per year
[26] Based on the ABS growth scenario which assumes 98.1 dwellings per year
[27] This assumes the historical growth rate of 103.3 dwellings per year
[28] Assumes 20% of land area for roads, infrastructure and open space with 600 m^2 per dwelling in the General Residential zone. Adoption of 600 m^2 in the General Residential zone is inherently conservative as the permitted dwelling density is 325 m^2 and the minimum lot area is 450 m^2.
[29] Assumes 20% of land area for roads, infrastructure and open space with 600 m^2 per dwelling in the Village zone
[30] Assumes a lot size of 2,500 m^2 per dwelling in the Low Density Residential zone
[31] Assumes a lot size of 10,000 m^2 per dwelling in the Rural Living A zone
[32] Assumes a lot size of 20,000 m^2 per dwelling in the Rural Living B zone

The theoretical dwelling yield on vacant land in the:

- General Residential zone is 2,200 dwellings, located on 522 lots throughout the Burnie LGA (refer to Table 20)
- Village zone is 98 dwellings, located on 19 lots in Ridgley
- Low Density Residential zone is 35 dwellings, located on 10 lots in Burnie, Havenview and South Burnie
- Rural Living zone is 32 dwellings, located on 31 lots in East Cam, Havenview, Natone, Park Grove, Romaine, Stowport, Upper Natone, Round Hill and Wivenhoe.

This results in a theoretical dwelling yield of 2,365 dwellings on vacant land in Burnie.

Table 20 provides a breakdown of vacant land and the theoretical dwelling yield in the residential zones in Burnie. Where settlements are not mentioned there is no vacant land in that zone.

Table 20 Location of vacant residential land (Source: ERA Planning and Environment, The LIST)

Settlement	Vacant area (ha)	No. of vacant lots	Theoretical dwelling yield
General Residential zone[33]			
Acton	1.48	3	19
Brooklyn	2.93	13	34
Burnie	2.85	17	28
Chasm Creek	0.24	2	2
Cooee	1.40	10	14
Downlands	14.25	30	184
Emu Heights	0.85	2	11
Havenview	9.92	29	123
Hillcrest	16.49	15	222
Montello	1.88	15	19
Mooreville	21.80	43	292
Ocean Vista	2.98	5	40
Park Grove	29.57	90	379
Parklands	1.45	8	16
Romaine	8.43	21	109
Shorewell Park	38.94	160	450
South Burnie	4.44	8	58
Upper Burnie	16.35	51	200

[33] Assumes 20% of land area for roads, infrastructure and open space with 600 m^2 per dwelling in the General Residential zone. Adoption of 600 m^2 in the General Residential zone is inherently conservative as the permitted dwelling density is 325 m^2 and the minimum lot area is 450 m^2.

Settlement	Vacant area (ha)	No. of vacant lots	Theoretical dwelling yield
Low Density Residential zone[34]			
Burnie	1.53	1	1
Havenview	7.61	8	23
South Burnie	0.39	1	11
Rural Living zone A[35]			
East Cam	3.15	2	3
Havenview	2.78	1	2
Natone	8.03	7	4
Park Grove	0.68	1	0
Romaine	9.17	8	5
Stowport	5.20	4	3
Upper Natone	13.60	2	13
Rural Living zone B[36]			
Round Hill	2.88	3	1
Wivenhoe	4.44	3	1
Village zone[37]			
Ridgley	7.60	19	98

4.4 Commercial and industrial land supply

Currently the four biggest industries in Burnie are Health Care and Social Assistance, Retail Trade, Education and Training, and Manufacturing. Together, these four industries make up nearly 50% of employment in Burnie.

There is currently vacant land in the following areas:

- 2.45 ha zoned Commercial in Cooee and Burnie
- 1.34 ha zoned Central Business in Burnie
- None zoned Local Business in the Burnie LGA
- 13.56 ha zoned Light Industrial in Camdale and Emu Heights
- 30.57 ha zoned General Industrial in Burnie, Havenview, Round Hill, South Burnie and Wivenhoe.

Given the proposed projects in the renewable energy sector in Burnie and the wider region, it is likely that there will be an increased demand for jobs in the construction and manufacturing industries, and by association, in the accommodation and food services, other services, and health care and social assistance. It is likely this will generate demand for industrial and commercial floorspace in the Burnie LGA. There is likely

[34] Assumes a lot size of 2,500 m^2 per dwelling in the Low Density Residential zone
[35] Yield calculations have assumed a lot size of 10,000m2 per dwelling in the Rural Living A zone.
[36] Yield calculations have assumed a lot size of 20,000m2 per dwelling in the Rural Living B zone.
[37] Assumes 20% of land area for roads, infrastructure and open space with 600m^2 per dwelling in the Village zone

to be sufficient commercial floorspace; however, additional industrial land may be required. It is recommended that a specific commercial and industrial analysis is undertaken to determine whether the current supply will be sufficient for the next 20 years.

A summary of vacant non-residential land is provided in Table 21 and Table 22.

Table 21 Summary of vacant commercial and industrial land in Circular Head (Source: ERA Planning and Environment, The LIST)

Zone	Vacant area (ha)	Vacant area (m^2)	No. of vacant lots
Commercial[38]			
Local Business	0	0	0
Central Business	1.34	13,396	22
Commercial	2.45	24,547	21
TOTAL	**3.92**	**39,233**	**47**
Industrial			
Light Industrial	13.56	135,598	12
General Industrial	30.57	305,683	36
TOTAL	**44.13**	**441,281**	**48**

Table 22 Location of vacant non-residential land (Source: ERA Planning and Environment, The LIST)

Settlement	Vacant area (ha)	No. of vacant lots
Commercial zone		
Cooee	1.44	4
South Burnie	1.01	17
Local Business zone		
There are no vacant lots		
Central Business zone		
Burnie	1.34	22
Light Industrial zone		
Camdale	2.67	11
Emu Heights	10.89	1
General Industrial zone		
Burnie	0.57	1
Havenview	0.15	2
Round Hill	2.93	6

[38] The General Business zone isn't used in the Burnie LGA

Settlement	Vacant area (ha)	No. of vacant lots
South Burnie	22.86	7
Wivenhoe	4.06	20

4.5 Key strategic development sites

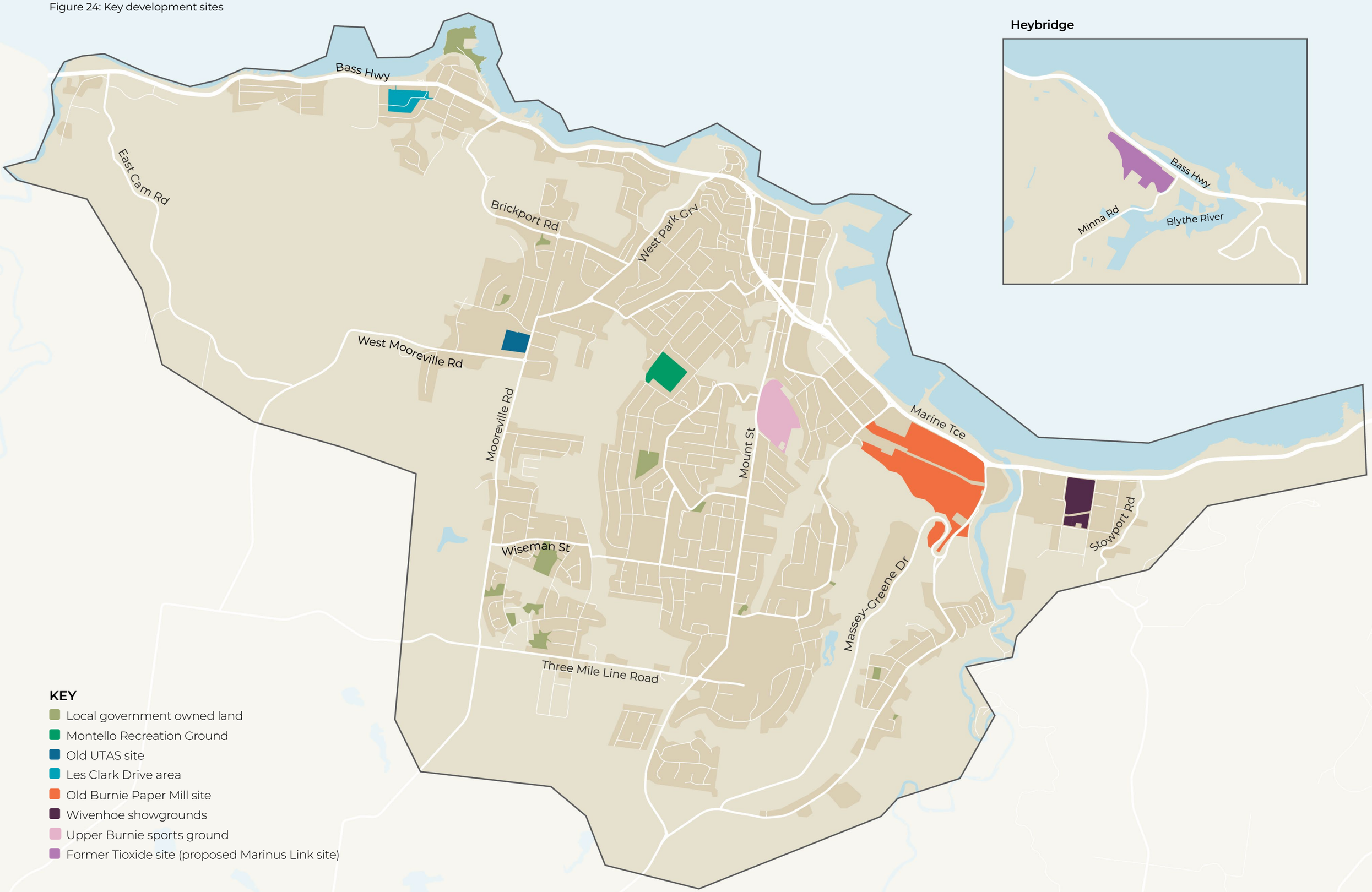
In consultation with Council, several sites have been identified in the LGA that are either owned by Council or privately owned and have significant development potential. These could form key development sites in the future to accommodate:

- Specific forms of housing, such as medium density housing, affordable housing, social housing or workers accommodation
- Recreation spaces
- Playgrounds or public open space
- New industries to the area, such as facilitating renewable energy projects like Marinus Link or laydown areas for larger industrial projects
- Retail and commercial space.

Some of the sites identified are shown in Figure 24 below and include the former Burnie Paper Mill site, the Wivenhoe showgrounds, the former UTAS site on Mooreville Road, the Upper Burnie sports ground, the Montello Recreation Ground and the Les Clark Drive area.

Feedback will be sought from the community on the use of these sites for other purposes and to identify other potential sites that could be better used for the benefit of Burnie residents.

Figure 24: Key development sites



4.6 Transport and access

As demonstrated by the travel to work data from the 2021 ABS census, Burnie residents are highly car dependent, with nearly 80% of employed residents travelling to work by car and only 1.2% relying on public transport. Car ownership in Burnie further reflects this, with 51% of households having access to two or more motor vehicles, and only 7.3% of households not having access to any. This dependence on private vehicles could become a concern as fuel prices rise and affordability decreases.

Metro Tasmania is the primary bus service provider in Burnie, with routes passing through most suburbs nearer to the CBD. However, there are significant distances between routes, and the bus routes are not considered frequent. These reasons likely explain why only 1.2% of employees use buses to get to and from work. Kinetic (formerly Redline) also provides services in Burnie and across the North-West, with routes from Burnie to Smithton, the West Coast and Devonport, and connecting routes statewide. Tassielink also provide a bus route between Burnie and Strahan.

The North-West Coastal Pathway is currently being constructed and will provide a shared pathway between Wynyard and Latrobe over approximately 110 km. Large sections are already completed, which have been received with great enthusiasm by the community and are already in high use. In Burnie, the section from the Cam River to Cooee is nearly complete, and from Cooee to Wivenhoe is complete. The section from Wivenhoe to the eastern Burnie LGA border at the Blythe River is incomplete, and waiting on federal funding, agreement and design.

4.7 Tourism demand

The 2030 Visitor Economy Strategy commissioned by Tourism Tasmania in August 2023 suggests that Tasmania will see 2 million interstate and international visitors to the state by 2030 with an average growth rate of 2.6% per annum from 2025-2030. Intrastate trips by Tasmanians are also set to increase. The associated annual visitor expenditure from international and interstate visitors could grow to $5.6 billion by 2030, more than double the value in 2019, with an average annual growth of 4.8% across 2025 to 2030.

West by North West is one of four regional tourism organisations in Tasmania and works with the tourism industry at a local and regional level, and with government at all levels. It released the Regional Tourism Strategy 2022-2025 last year, which provides a three-year vision to deliver the 2030 Visitor Economy Strategy. The strategy states that the vision for North-West Tasmania is to be Australia's pre-eminent agritourism destination, embracing, celebrating and sharing the rich agriculture and iconic wilderness. The four main focuses of the strategy are to advocate for legislative change to facilitate agritourism; capitalise on consumer and business events to attract visitors to the region; support major projects in the region; and prepare the tourism industry for the arrival of the new Spirit of Tasmania ferries. The major projects in the region are the redevelopment of Dismal Swamp, Cradle Mountain Visitor Experience master plan, and Don River Railway. While these three projects are outside the Burnie LGA, Burnie is near all three and is predicted to experience an increase in tourism as a result.

The upgrade of the Spirit of Tasmania ferry service will increase tourism numbers in Tasmania, and particularly on the north-west coast. The upgrade includes two new larger ships and an upgrade of the terminal in Devonport. The new ships will increase passenger capacity from 1,400 to 1,800; additional cabins will be included, and the number of lane metres for passenger and freight vehicles on board will increase by nearly 60%. This will result in the new ships carrying more passengers and vehicles across Bass Strait which will impact tourism supply and demand in Burnie. The construction of the new ships is underway and they are due for completion in 2024 and 2025[39].

Additional tourism projects in the pipeline for the North-West region include West Coast heritage strategy, West Coast off-road vehicle strategy, completion of the coastal pathway, development of the Ocean Dunes

[39] Spirit of Tasmania website (Source: https://newships.spiritoftasmania.com.au/)

golf club on King Island, new private accommodation developments in Cradle Mountain, Opulus Hotel on Table Cape, and the Next Iconic Walk on the west coast.

Burnie also receives cruise ships each year, with over 107,000 passengers and crew expected to visit Burnie in the 2023-24 season.

Air and sea capacity, accommodation, workforce and transport availability are all constraints to tourism growth. Investing in tourism infrastructure in Burnie will be key to encouraging and retaining visitors in the LGA.

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