

# Draft SEQ Regional Industrial Lands Strategy

**A Submission to the Queensland Department of State Development,  
Infrastructure and Planning**

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## 1. Introduction

South East Queensland (SEQ)’s industrial land capacity is now one of the most consequential determinants of freight network performance, supply chain resilience and economic competitiveness in the region. With SEQ’s population approaching approximately 4 million<sup>1</sup>—representing more than 70 per cent of Queensland’s total—the demand for logistics, manufacturing, construction inputs and consumer goods continues to escalate at a pace faster than most Australian metropolitan regions. This growth intensifies freight volumes across road, rail, port, and aviation gateways, placing unprecedented pressure on the availability and suitability of industrial land positioned near nationally significant transport corridors.

The Draft SEQ Regional Industrial Land Strategy (the Strategy) is a welcome and necessary step toward a more coordinated, evidence-based approach to securing freight-suitable industrial precincts. Its commitments to maintaining a long-term land pipeline, sustaining a minimum five-year supply of fully serviced land, protecting Major Enterprise and Industrial Areas (MEIAs), and modernising planning provisions provide a solid starting point. These policy settings reflect recognition of industrial land’s structural importance to Queensland’s economy<sup>2</sup>.

<sup>1</sup> <https://kpmg.com/au/en/media/media-releases/2025/12/south-east-queensland-population-soars.html>

<sup>2</sup> <https://www.treasury.qld.gov.au/files/SEQ-Economic-Foundations-Paper.pdf>, p.4

However, feedback from ALC members and independent market analysis highlights several material gaps when the Strategy is assessed against the operational realities of freight and logistics operators:

- Serviced, freight-connected land availability is limited, not just zoned land.
- Infrastructure sequencing frequently lags demand, delaying precinct activation.
- Protection of freight-critical corridors and rail/port interfaces is inconsistent.

Independent analysis shows that serviced industrial land is now critically scarce. Prime industrial rents in Greater Brisbane have increased by approximately 50 per cent since 2021, reflecting strong demand for freight-proximate assets<sup>3</sup>. Meanwhile, Economic Development Queensland's (EDQ's) analysis indicates SEQ holds only eight to nine years of serviced land at current consumption rates—far below the strategic pipeline required for a region of SEQ's scale and economic importance<sup>4</sup>.

ALC's central objective is to strengthen the Strategy so it aligns industrial land supply with the operational requirements of a modern, multimodal freight system. This includes:

- Clarifying intermodal terminal delivery pathways.
- Safeguarding land for future terminal expansion.
- Elevating the Port of Brisbane's dedicated freight rail connection to a State-significant priority.
- Improving enabling infrastructure governance and sequencing.
- Embedding freight-functional design standards in MEIA planning.
- Anticipating emerging energy transition logistics and supply chain resilience requirements.

## 2. Industrial Land Supply and Freight Suitability

SEQ's industrial land challenge is not primarily a matter of zoning; it is a matter of ensuring land is serviced, well-located relative to freight corridors, protected from incompatible uses, and capable of supporting freight-intensive operations. While the Draft Strategy recognises the importance of maintaining long-term and short-term supply pipelines, a freight-specific assessment indicates that current arrangements fall short of what is required to meet present and future freight demand.

Although the region holds approximately 10,000 hectares of zoned industrial land, EDQ's analysis confirms that only around 20 per cent (~2,140 ha) is serviced and development ready (EDQ, p. 12). This mismatch between zoned supply and usable supply presents a critical barrier for freight operators, whose location decisions depend on access to utilities, power resilience, stormwater capacity and proximity to freight corridors, rather than the mere existence of zoning. Freight businesses typically operate within tight margins and high-pressure delivery cycles; delays caused by insufficient servicing or uncertain infrastructure sequencing can render entire precincts commercially unviable.

Freight-suitable industrial land is also disproportionately concentrated in a handful of locations—particularly Yatala/Stapylton, Crestmead/Berrinba, Narangba/Burpengary, and emerging precincts west of Ipswich—where demand continues to outstrip supply. Industrial rents in these locations have risen sharply, with SEQ recording some of the nation's highest industrial rental growth over the past four years. This market signal reflects a structural undersupply of land in freight-advantaged locations.

The Strategy's identification of longer-term growth precincts—including Ebenezer, Bromelton SDA, Charlton-Wellcamp and Yandina East—is an important starting point. However, these areas require early and explicit commitments regarding freight access, servicing, and land protection. Ebenezer, in particular, should be formally recognised as a system-critical terminal interface whose development will shape the viability and configuration of regional freight movement over coming decades, while leaving scope for complementary intermodal terminals and freight network connections over time. Long-term land planning must therefore be grounded in a freight-first logic: that industrial land needs to be conceived not as isolated parcels but as components of a wider network in which land, infrastructure, multimodal access, and industrial activity are mutually reinforcing.

<sup>3</sup> <https://www.propertycouncil.com.au/wp-content/uploads/2025/09/No-Room-To-Grow-Industrial-Land-Supply-and-Vacancy-Report.pdf>, p. 2, p.57

<sup>4</sup> <https://www.edq.qld.gov.au/news/regional-development/investing-in-industry-unlocking-queenslands-economic-potential/>, pp. 11-12

### 3. Infrastructure Sequencing, Servicing and Delivery Discipline

Infrastructure sequencing is the central determinant of whether industrial land becomes genuinely development ready. The Draft Strategy acknowledges the importance of coordinated servicing, but its implementation framework requires greater precision and monitoring discipline to ensure trunk infrastructure is delivered ahead of—or at least in parallel with—freight-intensive development.

In many MEIAs, enabling infrastructure lags industrial land demand by five to ten years, delaying commercial development, and eroding investor confidence. Substation capacity, trunk water and sewer connections, stormwater upgrades and freight-capable road access require long lead times and substantial capital investment. Where timing is misaligned, precincts remain effectively unusable even when zoned. Freight operators and industrial developers consistently identify this sequencing failure as the most persistent barrier to investment across SEQ.

The proposed Industrial Land Infrastructure Coordination Working Group is a constructive reform. However, to be effective, its responsibilities must include publishing an annual enabling infrastructure pipeline with clear sequencing assumptions, funding responsibilities and delivery timelines, highlighting freight-critical upgrades—including HPFV-compatible access routes and power augmentation requirements—and explicitly align with the Strategy’s minimum five-year fully serviced land requirement.

Enabling infrastructure planning must also incorporate freight transport infrastructure rather than treating it as external to servicing coordination. Road freight remains the dominant mode for non-bulk and metropolitan freight movements and is essential for first- and last-mile connectivity across SEQ<sup>5</sup>. Heavy-vehicle routes into and out of MEIAs must therefore be safeguarded early, alongside rail interface requirements such as sidings, clearances, and future terminal connectivity.

Infrastructure sequencing must also anticipate growth in aviation logistics. SEQ’s principal international airfreight gateway handled approximately 84,000 tonnes of international freight in FY24<sup>6</sup>, supporting high-value perishable exports, e-commerce, and time-sensitive supply chains. Industrial precincts in the western corridor, including Wellcamp/Charlton, require infrastructure designed for the operational requirements of airfreight-linked logistics—temperature-controlled warehousing, high-capacity power for automation, and direct freight corridor access.

Successful land development in SEQ hinges not only on land availability but on disciplined delivery of enabling infrastructure. The Strategy must embed this delivery discipline directly into its implementation framework.

### 4. Freight Network Integration and National System Interfaces

The effectiveness of SEQ’s industrial land strategy depends on the performance, capacity and integration of the region’s freight networks. Industrial land cannot support freight-intensive activity unless it is directly connected to reliable and efficient road, rail, port, and aviation corridors. The Draft Strategy acknowledges freight access as a key consideration but does not yet provide the depth required to support long-term freight system performance.

#### 4.1 ROAD FREIGHT

Road freight volumes in Queensland are forecast to continue growing due to population increase, construction demand and the intensification of last-mile delivery networks. Articulated truck vehicle kilometres have increased by more than 25 per cent nationally over the past decade, reflecting the escalating intensity of freight movements across urban and inter-urban corridors<sup>7</sup>. To support South East Queensland’s growing freight task, population growth, and high-demand periods such as the 2032 Olympic Games, the State should consider trialling Higher Productivity Vehicles (HPVs), such as B-Triples, as part of a coordinated multimodal freight strategy. HPVs can move up to 30 per cent more freight per trip than standard B-Doubles<sup>8</sup>, helping to reduce the truck footprint on key arterial roads and maintain supply chain resilience amid an ageing workforce. When deployed alongside targeted rail investments—including dedicated freight corridors, intermodal terminals, and Port of Brisbane rail links—HPVs provide additional flexibility to manage peak container volumes and short-term disruptions. Embedding HPVs into MEIA planning and prioritising enabling infrastructure upgrades ensures road and rail freight work in concert, enhancing interstate and intrastate supply chain efficiency, supporting economic outcomes for Queensland consumers, exporters, and producers, and advancing long-term productivity and sustainability targets.

<sup>5</sup> <https://www.bitre.gov.au/publications/2025/australian-infrastructure-and-transport-statistics-yearbook-2025>

<sup>6</sup> [https://www.bne.com.au/sites/default/files/docs/2024-10/BAC-Annual-Report\\_2024.pdf](https://www.bne.com.au/sites/default/files/docs/2024-10/BAC-Annual-Report_2024.pdf)

<sup>7</sup> <https://www.bitre.gov.au/publications/2022/bitre-report-167>, p. 18

<sup>8</sup> <https://www.transport.nsw.gov.au/system/files/media/documents/2025/Emission-and-economic-modelling-of-road-freight-in-NSW-Final-Report.pdf>

Industrial precincts lacking freight-capable access, appropriate intersection geometry or 24-hour operational allowances are structurally disadvantaged. These constraints are acute in Logan, Ipswich, Moreton Bay, and the Gold Coast, where residential encroachment has progressively narrowed freight operating windows. MEIA protections must therefore embed freight operational requirements directly into planning controls.

#### 4.2 INTERMODAL TERMINALS AND INLAND RAIL INTEGRATION

Rail freight capacity is central to SEQ's long-term competitiveness. Inland Rail is designed around 1,800-metre double-stacked trains, yet SEQ currently has no terminal capable of receiving trains of this scale. This is not merely an infrastructure gap but a governance and land-protection issue with significant implications for the program's national freight benefits.

Current evidence strongly indicates that Ebenezer represents the only currently identified location capable of accommodating the full Inland Rail operating specification in South East Queensland, and early safeguarding of its land, utilities, and rail geometry is critical. Complementary intermodal terminals may also be required over time to support population growth, freight task diversification, and system resilience.

Rail operators advise that terminal location, footprint safeguarding, utilities sequencing and rail geometry must be secured early. Ebenezer should therefore be formally recognised and safeguarded in regional planning as the principal Inland Rail-capable terminal precinct, consistent with current service design and land capability assessments, while leaving scope for complementary terminals in northern and port-oriented locations rather than treated as a generic industrial growth area.

#### 4.3 STRENGTHENING SEQ PORT SUPPLY CHAINS THROUGH DEDICATED RAIL

South East Queensland's container volumes are projected to triple by 2045<sup>9</sup>, placing unprecedented demand on freight networks. Currently, fewer than two per cent of containers move by rail, well below international benchmarks. Shared passenger-freight corridors constrain scheduling reliability, reduce path availability, and impose curfews that are misaligned with freight operational requirements. Government planning, including up to \$20 million in funding<sup>10</sup> for a dedicated freight rail connection, represents a positive step toward unlocking the full benefits of Inland Rail and supporting the Port of Brisbane's long-term role in SEQ supply chains. Elevating this initiative to a State-significant freight priority will be critical to maximising supply chain efficiency, supporting industrial land strategy outcomes, and enhancing the resilience and sustainability of port-related logistics.

#### 4.4 INTERMODAL CAPACITY AND NETWORK INTEGRATION

SEQ will require a future Northern Intermodal Terminal to service growth in the Moreton Bay, Sunshine Coast, and northern Brisbane corridor. The Elimbah–Narangba corridor remains the final rail-adjacent location with sufficient landmass to support such a terminal. If this land is not safeguarded, SEQ will lose the opportunity to build a balanced, multimodal freight network capable of servicing northern population growth.

### 5. Planning Framework, Encroachment and Operational Integrity

Modern logistics operations depend on land-use certainty. Reverse amenity pressures—noise, lighting, heavy-vehicle movements and 24-hour operations—are intrinsic to freight precincts. Without robust planning protections, residential encroachment erodes operational viability, increases freight costs, and shifts activity into less efficient locations.

The Draft Strategy recognises the need to modernise planning schemes and protect MEIAs from incompatible uses. However, these commitments require stronger statutory mechanisms. Freight-sensitive uses such as childcare, medium-density housing and mixed-use development continue to be approved adjacent to logistics precincts, imposing costly mitigation burdens on industry. The Strategy should mandate statutory buffer requirements, freight corridor overlays and a right-to-operate framework for designated freight precincts.

Intensification within industrial precincts must also be freight functional. Multi-storey logistics developments, robotics, high-capacity power loads and advanced automation require specific built-form envelopes, pavements, and utility capacity. Intensification must therefore be compatible with freight operations rather than driven by aspirational density targets.

<sup>9</sup> <https://www.infrastructureaustralia.gov.au/pl/port-brisbane-dedicated-freight-rail-connection>, p.4

<sup>10</sup> <https://www.tmr.qld.gov.au/projects/port-of-brisbane-further-planning>

Planning schemes must embed freight operational standards—HPFV access, 24/7 operations, rail interface protections, noise and vibration attenuation and freight-specific design requirements. Without this, industrial land becomes fragmented, inefficient, and vulnerable to conflict.

## 6. Emerging Requirements: Energy Transition, Resilience, and Innovation

The energy transition will fundamentally reshape industrial land requirements. Hydrogen production, advanced biofuels, battery storage and high-voltage charging infrastructure require large industrial parcels with controlled buffers, specialised storage, and reliable heavy-vehicle access. These are freight-intensive uses that must be anticipated within MEIA planning.

Supply chain resilience also requires geographic diversity. Flooding on inland corridors, vulnerabilities on coastal highways, rail networks and pressure on airport and seaport interfaces highlight the need for redundancy across freight routes. Industrial land strategy should therefore support spatially distributed freight precincts rather than over-concentration.

Innovation in logistics—automation, robotics, electrified fleet depots and AI-enabled warehousing—requires high-capacity power, digital connectivity, and adaptable industrial built form. These requirements must inform MEIA servicing standards and precinct design. Demonstration sites for advanced logistics should be encouraged in freight-intensive precincts where complex SKU environments support real-world testing.

## 7. Priority Enhancements to Strengthen the Final Strategy

To ensure the Draft Strategy delivers freight-functional outcomes, ALC recommends targeted refinements aligned to industry needs and system-level freight priorities.

1. Explicitly commit to an intermodal terminal delivery pathway, recognising Ebenezer as the principal Inland Rail interface, while leaving scope for complementary terminals linked to existing freight networks.
2. Support and elevate the Port of Brisbane's dedicated freight rail connection as a State-significant initiative.
3. Safeguard land for a future northern intermodal terminal to service growth in the Moreton Bay, Sunshine Coast, and northern Brisbane corridor.
4. Strengthen enabling infrastructure governance through a transparent annual trunk infrastructure pipeline aligned to serviced land requirements, including freight corridors, utilities, and trunk roads.
5. Frame final Strategy targets around years of serviced supply by category and subregion, with transparent annual reporting.
6. Embed freight operational standards within MEIA planning provisions from the outset, including HPFV access, 24/7 operations, rail interface protections, noise and vibration mitigation, and freight-specific built form.
7. Strengthen statutory protections to support operational certainty for freight precincts, including buffers, overlays, and right-to-operate provisions.
8. Provide guidance for freight-compatible intensification in constrained logistics precincts.
9. Integrate energy-transition logistics, resilience considerations, and spatially distributed precincts into long-term planning.
10. Encourage demonstration and innovation sites within freight-intensive precincts.

### Priority Locations and Actions:

- **Logan – Crestmead/Berrinba MEIAs:** Deliver serviced land, operational buffers, and Park Ridge Connector within 5 years to support freight and industrial activity.
- **Gold Coast – Yatala/Stapylton MEIA:** Integrate staged road upgrades and Coomera Connector; intensify land use where feasible.
- **Moreton Bay – Narangba & Elimbah East MEIAs:** Reserve land for a future Northern Intermodal Terminal and ensure connectivity with key arterial routes.
- **Ipswich – Ebenezer MEIA:** Secure terminal interfaces, rail clearances, and land ownership alignment to support Inland Rail and industrial operations.

- **Scenic Rim – Bromelton SDA:** Maintain rail-dependent industry protection, staged utilities, and siding capacity.
- **Toowoomba – Charlton–Wellcamp MEIA:** Align InterLinkSQ terminal operations with Inland Rail and ensure road/rail path capacity.
- **Brisbane/ATC:** Support brownfield logistics renewal and integrate a dedicated Port of Brisbane rail link while enabling general industrial benefits.

## 8. Conclusion

South East Queensland is entering a period in which decisions on industrial land supply, freight network integration and infrastructure sequencing will have enduring implications for the region’s economic performance and supply chain resilience. The Draft South East Queensland Regional Industrial Land Strategy provides a sound foundation; however, it requires targeted strengthening to ensure industrial land is not only available, but genuinely freight-functional, resilient, and aligned with national freight network development.

Incorporating the enhancements outlined in this submission would materially improve the Strategy’s capacity to support a modern, multimodal, and efficient freight system—one that sustains economic growth, facilitates private investment, and underpins South East Queensland’s long-term productivity and competitiveness.