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Whanganui District Council

Industrial Land Demand Study

Stakeholder survey results

June 2018

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Appendix B – Online Survey Report

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1. Introduction

1.1 Overview

GHD is currently undertaking an **Industrial Land Demand Study** to assist Whanganui District Council to understand the supply and demand for industrial land within Whanganui city. The outcome of this study will inform a potential plan change to the Whanganui District Plan.

Part of the study includes engagement with stakeholders to understand their perceptions and experiences with industrial land supply and demand in Whanganui. To support this work, GHD sought feedback from the market, through both online and face-to-face surveying.

1.1.1 Online survey

GHD created two versions of an online survey, hosted on survey platform **Typeform**, for a database of business operators and market commentators / service providers around Whanganui. The raw database was provided by Whanganui & Partners, Council's economic development agency, and refined to 64 confirmed email addresses by GHD.

The five-minute surveys were designed to elicit short answers that could point to key themes. Links to the survey and the report are provided below, with the survey results provided in Appendix A and the Survey Report in Appendix B.

[Operator survey](#)

[Commentator survey](#)

[Survey report](#)

The survey was launched on 26 February 2018 via an email from Rhonda Morris (Whanganui & Partners). The email invited participation and encouraged recipients to anonymously share their thoughts with regard to the quality, availability and suitability of industrial land in Whanganui. The survey closed on 5 April 2018.

1.1.2 Face-to-face interviews

To complement the online survey, GHD contacted selected business leaders and market commentators to organise face-to-face interviews¹. The purpose of these face-to-face interviews was to seek a more qualified analysis that could explain some of the themes identified through the online survey. As per the online survey, interviewees were assured that their comments would be reported anonymously.

1.2 Purpose of this report

The purpose of this report is to summarise the themes, opinions and perceptions gleaned from the online survey and face-to-face interviews, to provide a snapshot of market commentary on Whanganui's current industrial land use.

1.3 Scope and limitations

At just over 15%, the take-up of the online survey was below the level targeted, despite an extended survey period and reminder emails being sent out. Similarly, only 50% of the scheduled face-to-face interviews took place due to last minute cancellations from the interviewees.

This document is in draft form. The contents, including any opinions, conclusions or recommendations contained in, or which may be implied from, this draft document must not be relied upon. GHD reserves the right, at any time, without notice, to modify or retract any part or all of the draft document. ¹ Interviewees were selected in consultation with Whanganui District Council and Whanganui and Partners, focusing on a variety of business size and location.

While the sample sizes are considered sufficient to indicate prevailing trends and attitudes, it is important to underline that the accuracy of the reporting and analysis contained in this report is limited to the information received through the online survey and face-to-face interviews. Given the usefulness and candid nature of the feedback recorded through face-to-face interviews, we therefore recommend that further face-to-face interviews be scheduled with Whanganui business leaders.

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2. Key themes

2.1 Land supply – insufficient or just inaccessible?

Despite the current availability of areas of industrially-zoned land in Whanganui (including at Mill Road, Eastown and Aramaho), responses through the online survey pointed to a lack of available land of the right quality for industrial use, with adjectives used including “insufficient”, “short supply” and “restricted”.

This corresponded with the anecdotal feedback recorded through the face-to-face interviews that suggested that the Heads Road industrial area – including immediately-surrounding areas such as Hinau Street – was viewed as the most / only viable location for industrial operators, but that this area was now essentially ‘full’. These interviews provided useful context as to the reason for the lack of availability and the opportunities to overcome this (see Sections 2.1.1-3).

The single survey respondent from Hinau Street expressed high satisfaction with the location, citing its transport connections as a primary advantage.

Only one survey respondent identified as operating from Aramoho. While the respondent indicated high satisfaction with the location, the reason given for this was uniquely down to the building structure and size, noting that “location is not important to my business”.

2.1.1 Inefficient land use at Heads Road

In the Heads Road industrial area, respondents considered that a lack of structure, characterised by the way disparate businesses are co-located along Heads Road, indicated that the land in this area is not being used as efficiently as it could be.

Both the online survey and face-to-face interviews identified Heads Road as the engine room of Whanganui’s economy, providing benefit to operators through its transport links (road and rail) and co-location of supporting industries. However, anecdotal feedback through the face-to-face interviews pointed to a frustration among operators that economic growth is being hampered by inefficient land use, with existing ‘active’ land taken up by scrap yards or operations that do not naturally rely on the area’s inherent connectivity benefits, and surrounding land remaining undeveloped.

2.1.2 Single operating model

Other land around the Heads Road area that interviewees believed could be used, but is currently considered unavailable, is land that is subject to mana whenua interests or that is part of the Harbour Endowment portfolio.

This points to another potential impediment to efficient land use, in the unwillingness of operators to lease land in a comparatively low-cost buyers’ market.

This dynamic, and its knock-on effects, is not limited to Heads Road, with the example of Castlecliff Health setting up its clinic in the Mill Road Manufacturing Area a case in point.

The clinic operators chose to locate themselves here primarily due to what they believed to be a lack of viable alternatives in Castlecliff. For the operators, viability was defined by the ability to purchase a suitable site. The knock-on impact of this is that there is now a key non-industrial service provider located in an industrial zone. This will increasingly influence people flows in and out of the area, which will need to be recognised through the way roads and paths are designed, and it will potentially encourage other non-industrial operators to set up in the Mill Road manufacturing area too.

2.1.3 Developable land lying dormant

Areas such as the old Balgownie Dump and the land around Hinau Street are viewed by operators as having strong development potential. Furthermore, with some of this land already under Council ownership, they see little impediment to Council making this available ahead of prioritising other areas further removed from the Heads Road hub (e.g. Mill Road). Relying on historic zoning rather than responding to current market dynamics was viewed by some interviewees as taking the easy, but ultimately less economically advantageous route.

2.2 Why operate from Whanganui?

2.2.1 Location, location, location

The vast majority of survey respondents and interview subjects cited the fact they were from Whanganui as the main reason for operating here (rather than having chosen to relocate here).

The prevailing sentiment among survey respondents and interviewees was one of satisfaction with where their business was located – the majority of these being in or around Heads Road.

Nine of the ten survey respondents indicated that their current location supports their business objectives, citing location in relation to transport routes, location of Whanganui in central New Zealand, and land and building size and type. Supplementary information indicated that proximity to similar firms and provision of services were also key factors.

The one respondent who felt their location did not support their business objectives cited the lack of port infrastructure as a factor.

Survey respondents also indicated support for the Mill Road development as a potential new home for business. Two survey respondents expressed a desire to move to Mill Road; one because of its location above the flood level, and the other as it appeared likely to become an upmarket industrial/commercial subdivision. Notably, given anecdotal feedback around the suitability of the Mill Road area for high stud, large footprint warehousing, the respondent who cited Mill Road's location above the flood level listed the nature of their business as storage.

Half of the survey respondents indicated that they had previously considered moving their business out of Whanganui out of frustration at the lack of suitable land availability and lack of amenity, but had likely chosen not to for the benefits as listed above. This tallies with the inference through the round of face-to-face interviews that historically Whanganui has succeeded almost in spite of itself.

2.2.2 Operating cost

Whanganui's attractiveness as a home for industry is linked to the cost of operating here, with the twin benefits of low land costs and a cheap but reliable work force cited by all interviewees. The lifestyle the region affords outside of work was also seen as a key contributor to Whanganui's appeal.

The rail connectivity (a container terminal has been operating in Heads Road since 2015) and subsidised freight connection to Centreport also makes the Heads Road area in particular a hugely attractive proposition for export industries. One interviewee reported that Centreport provides an 80% subsidy to haulage costs, thereby making Whanganui a cheaper export proposition than the major centres.

2.2.3 Which industries should be here?

Whanganui has traditionally relied on its core manufacturing and processing industries to anchor its industrial economy and these are still clearly visible, particularly along Heads Road.

However, all interviewees stressed that the region needs to look forward, rather than rely on what might be deemed the unskilled labour of the past.

Rather than large scale manufacturing per se, interviewees considered that the region should be seeking to attract 'smart manufacturing'. To support this, one interviewee highlighted that the region will need to be able to provide these businesses with a ready-made workforce of skilled operatives, which will require closer liaison between council, industry and the Ministry of Social Development – as is beginning to occur in other regions.

An example of target smart manufacturing given by one interviewee was around the expected upcoming boom from the forestry industry and the growth of Whanganui Port. Rather than simply becoming a place where logs are loaded to be sent elsewhere, Whanganui should strive for more and seek to establish a modern timber mill here.

Flat pack housing and fabrication were also viewed as key target industries, along with a new Open Country Cheese Plant on its Heads Road premises. If it were to eventuate, the interviewee (not from Open Country) estimated such an operation would bring in over 100 jobs.

With other cheese factories across the country spawning complementary businesses, such as retail and cafes, this example was also in line with other feedback from interviewees around investing in more visitor-friendly industries.

It was also suggested that Whanganui would benefit from increased industrial service providers, such as engineering and electrical. This comment was qualified by the current difficulty experienced in accessing trade help to fix issues. The Port revitalisation was seen to be a positive move towards this, providing an anchor business that would support the viability for these service providers to be located here.

It was also noted that Xero recently set up an office in Napier, indicating a leadership role from modern (non industrial) businesses to decentralise and support the regions, and that Whanganui should also be competing in this market.

2.3 Vacant land

Survey participants were asked if they owned any vacant industrial land in Whanganui. Of the three that did, two cited a lack of market interest as the primary reason for not developing it (the other being cashflow). This supported the sentiment that the focus remained very much on Head Road.

2.4 What does Council need to do?

Interviewees all agreed that Whanganui still suffers from the "Michael Laws hangover", but that the negative perception is lifting. Nationally there is a shift happening away from Auckland – and Council needs to ensure enough of the right industries are in place to attract some of this drift from Auckland to Whanganui.

Council also needs to do more to make it easier for businesses to set up and operate out of Whanganui, using incentives such as free rent for an initial period or a rates rebate.

It was also suggested by interviewees that Council could / should make "braver" development decisions, and be more proactive in working with iwi to incorporate land of mana whenua interest into the development mix. A particular recent example given was the lost opportunity to move Q West up to the Port to accommodate a new Cloudy Bay Clams factory on the waterfront. Two interviewees noted that the inability to work out a practicable solution resulted in Whanganui losing the opportunity for significant economic stimulus.

Interviewees also suggested that it's not just about what Council does, but also what it says. Whanganui & Partners needs to tell a joined up story to New Zealand about the benefits of

operating here, so as not to miss out on the current trend of people / operators moving away from the major centres

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3. Findings & recommendations

The overall impression gained from the survey results is that although businesses currently operating in Whanganui are mostly satisfied with their current industrial land, a negative view of the industrial land supply – which will impact on business expansion and new businesses coming to the area - in the market is widespread.

While the inherent benefits of the region, including lifestyle and operating costs, may be stopping businesses from shifting outside of Whanganui, this perception could be preventing businesses from elsewhere giving consideration to moving into Whanganui now or in the future.

3.1 Summary of key findings

3.1.1 Heads Road is not just a hub, it's *the* hub

Survey respondents and interviewees considered that realising the full value and potential of Heads Road as Whanganui's industry hub should remain the primary focus for the Council:

- In figures compiled five years ago, the area was calculated to generate \$1B in revenue annually, generating \$110M in wages across 2,500 staff².
- There is land around / directly adjacent to Heads Rd that should be developed to expand the hub, rather than try to create new industrial areas elsewhere.
- Further development in Heads Road is constrained by poor land use. Developing land outside Heads Road would be taking the easy, but ultimately less advantageous, route.
- The current status quo with Maori regarding land around Heads Road is a significant handbrake on Whanganui's economic development. Council should consider what levers may be available to it to enable this land to be used.
- Heads Road's rail connection to Centreport should be a huge drawcard for freight-reliant businesses.

3.1.2 Innovative thinking

The Council should be doing more to attract smart manufacturing industries to the area, for example a modern timber mill. The majority of respondents didn't provide any ideas about how to do this.

Whanganui's attractiveness has often been linked to land price – so considering how to promote a model with iwi as landlord may be a future necessity.

3.1.3 Mill Road

To be a viable proposition for Whanganui's main industries, the Mill Road manufacturing zone will require significant support service industries to relocate there, otherwise it risks becoming just a storage / warehouse hub. Anecdotal feedback suggests there is room in the market to support the growth of support-service industries.

3.2 Recommendations

The information mined from face-to-face interviews is particularly insightful and, as they have been conducted anonymously through a third party, have provided feedback that Council may

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otherwise struggle to elicit. It was apparent from the interviews that there were a number of themes, as described in this report, which could be explored further.

We therefore recommend carrying out a second tranche of interviews, to explore the themes identified through this initial report in more detail and provide Council with a more thorough understanding of market sentiment to help guide future land use decisions.

We propose the following as a schedule of interviewees for this second tranche:

- Mark McCarthy (McCarthy Transport) *National operator with strong presence in Whanganui*
- Murray Wight (Wight Aluminium) *Rumoured to be relocating to major new purpose-built site at Mill Road*
- Ray Mudgeway (Centreport) *Key stakeholder in Whanganui's growth*
- Glen Wadsworth (WW Construction) *Major business on Heads Rd and involved in new premise builds*
- Myles Fothergill (Q West) *Major operator on Heads Rd and Chair of Whanganui & Partners*
- Chris Edsall (Downer) *Major employer who also oversees other regions*
- Derek Pickering (MARS) *Major operator on Heads Rd, rumoured to have been looking outside of Whanganui for expansion*
- Hunter Tait (Tasman Tanning) *Major operator on Heads Rd*
- Rob Coley (Global Products) *Keystone tenant of Mill Road Manufacturing Area Stage 1*

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Appendices

Appendix A – Online survey Q&As (text as supplied)

What three words would you use to describe Whanganui's existing industrial land supply?

Limited; Undeveloped; Restricted.

What is the nature of your business?

Civil engineering

Where is your business currently located?

Heads Road West

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

Attractive land costs

How satisfied are you with Heads Road West as the current location of your business?

Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road West?

size of yard

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Size of yard

Where would you most like your business to be located in Whanganui?

Old City Council Yard

Why would you choose that location?

Proximity to the network

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

No

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

insufficient; ok; old.

What is the nature of your business?

self storage

Where is your business currently located?

hinau street

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

How satisfied are you with hinau street as the current location of your business?

Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of hinau street?

location

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

it's ok here but would like to be on higher ground

Where would you most like your business to be located in Whanganui?

Mill Road

Why would you choose that location?

it's above flood level

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

Yes

Why?

Lack of local availability

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

Not ; great; at all.

What is the nature of your business?

Wholesale trade

Where is your business currently located?

Heads Road East

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

My business activity relies on me being located here

Transport Connections

Other:

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How satisfied are you with Heads Road East as the current location of your business?

Very Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road East?

It is in the middle of the current industrial hub

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Its location, its easy to access and dispatch from

Where would you most like your business to be located in Whanganui?

Heads Road East

Why would you choose that location?

Quality of amenity

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

No

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

OK; Handy ; Road network good.

What is the nature of your business?

Logistics and cold storage

Where is your business currently located?

Heads Road West

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

How satisfied are you with Heads Road West as the current location of your business?

Very Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road West?

Easy access from out of town, good services such as power and water.

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Location

Where would you most like your business to be located in Whanganui?

Heads Road West

Why would you choose that location?

Transport connections

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

No

Do you own any vacant industrial land in Whanganui?

Yes

What is preventing you from developing it?

Lack of market interest

What three words would you use to describe Whanganui's existing industrial land supply?

Short supply; Needs nicely landscaped industrial and commercial subdivision; Areas where there is land need upgrading, old houses removed, vegetation removed ; this list goes on and on!.

What is the nature of your business?

Property developers

Where is your business currently located?

Heads Road West

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

Transport Connections

Other:

How satisfied are you with Heads Road West as the current location of your business?

Not Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road West?

Mixed area with low grade housing nearby

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Close to main routes

Where would you most like your business to be located in Whanganui?

Mill Road

Why would you choose that location?

Looks like it may finally be an up market subdivision

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

No

Do you own any vacant industrial land in Whanganui?

Yes

What is preventing you from developing it?

Lack of market interest

What three words would you use to describe Whanganui's existing industrial land supply?

Short; Unsuitable; underated.

What is the nature of your business?

Construction

Where is your business currently located?

Heads Road West

Why did you choose to operate your business out of Whanganui?

Other: "Origionally lifestyle, shifted to Whanganui"

How satisfied are you with Heads Road West as the current location of your business?

Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road West?

Simular Businesses around us

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Location

Where would you most like your business to be located in Whanganui?

We're okay where we are in Heads road, anywhere that offered the same visibilty or more.

Why would you choose that location?

Proximity to other businesses

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

Yes

Why?

We need to increase the size of our building, it appears our current site is not suitable for extending. 70% of our work is out of Whanganui, so shifting closer to our work is an option that we are considering

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

Poor; separated; unsupported.

What is the nature of your business?

Manufacturing

Where is your business currently located?

Aramoho

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

How satisfied are you with Aramoho as the current location of your business?

Very Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Aramoho?

Building size and land area

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Building structure and size

Where would you most like your business to be located in Whanganui?

Location is not important to my business

What factor or factors are preventing you from changing location within Whanganui?

Just have

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

Yes

Why?

Lack of local availability

Do you own any vacant industrial land in Whanganui?

Yes

What is preventing you from developing it?

Cashflow

What three words would you use to describe Whanganui's existing industrial land supply?

Plenty ; Available; Serviced.

What is the nature of your business?

Manufacturing

Where is your business currently located?

Hinau St

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

How satisfied are you with Hinau St as the current location of your business?

Very Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Hinau St?

Off the main Roads. Great for trucks

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

Central New Zealand

Where would you most like your business to be located in Whanganui?

Where we are Hinau St

Why would you choose that location?

Transport connections

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

No

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

limited; restricted; value.

What is the nature of your business?

Manufacturing

Where is your business currently located?

Heads Road West

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

Attractive land costs

How satisfied are you with Heads Road West as the current location of your business?

Not Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Heads Road West?

restricted river access

Do you feel your current business location supports your business objectives?

No

What are the major contributing factors (if yes)? Why not (if no)?

lack of port infrastructure

Where would you most like your business to be located in Whanganui?

Heads Road West

Why would you choose that location?

Cost of land

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

Yes

Why?

Quality of amenity

Do you own any vacant industrial land in Whanganui?

No

What three words would you use to describe Whanganui's existing industrial land supply?

None; Zero; zip.

What is the nature of your business?

Manufacturing

Where is your business currently located?

Mosston RD

Why did you choose to operate your business out of Whanganui?

I'm from Whanganui

How satisfied are you with Mosston RD as the current location of your business?

Satisfied

What is the primary advantage (if satisfied)/disadvantage (if dissatisfied) of Mosston RD?

It was available

Do you feel your current business location supports your business objectives?

Yes

What are the major contributing factors (if yes)? Why not (if no)?

It was available

Where would you most like your business to be located in Whanganui?

Location is not important to my business

What factor or factors are preventing you from changing location within Whanganui?

Lack of infrastructure in a preferred alternative

Have you considered moving your business out of Whanganui due to unavailability of suitable land here?

Yes

Why?

Lack of local availability

Do you own any vacant industrial land in Whanganui?

No

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Appendix B – Online Survey Report

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1	Gez Johns	Luke Chippindale		Sarah Jenkin		

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