



# Clemton Park | Retail and Bulky Goods Economic Impact Assessment

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PREPARED FOR PARKVIEW SYDNEY DEVELOPMENTS

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‘The former Sunbeam site can provide a mixed use facility that will integrate with the surrounding areas and not significantly impact the adjacent retail hierarchy...’



## Executive Summary

MacroPlan have been commissioned by Parkview Sydney Developments to undertake a retail and bulky goods economic impact and land use assessment in relation to their site at Clemton Park. The study was requested by the Director General of the Department of Planning to understand the impacts of re-zoning the site to allow retail development upon the site, including convenience, supermarket, specialty retail and bulky goods retail. The site will also provide further commercial and residential uses.

### Development

1. The Clemton Park site is located on the border of Campsie and Clemton Park bordered by Sunbeam Lane to the north, Charlotte St and Harp St to the west, Alfred St to the south and Viking St to the east. The site is located approximately 12 km from the Sydney CBD, approximately 1 km south of Campsie Town Centre and 250m south of Canterbury Road, which runs adjacent to the site accessible via Bexley Rd or Charlotte St.
2. The proposed development totals 87,332 m<sup>2</sup>, of which the retail component totals 24,854 m<sup>2</sup> Gross Leasable Area Retail (GLAR). This retail is detailed as a mix of:
  - Convenience, Specialty and Supermarket (CSS): 6,586 m<sup>2</sup>
    - Supermarket = 2,585 m<sup>2</sup>
    - Specialty/Convenience = 4,001 m<sup>2</sup>
  - Bulky Goods/Trade (BGS): 18,268 m<sup>2</sup>
    - Bulky Goods = 14,967 m<sup>2</sup>
    - Trade = 3,301 m<sup>2</sup>

### Market Context

3. For the purposes of this assessment, the economic impacts on existing supermarket and bulky goods traders has been undertaken, assuming the proposed development of significant retail floorspace is delivered in the next one to two years, with the first full year of trading to be in 2011.
4. The assessed trade areas differ for the retail offerings, with bulky goods attracting trade from a much larger area (5-7km) than the supermarket catchment, which is much more compact (1-2km).
5. The main trade area (MTA) for supermarket expenditure includes approximately 88,105 residents while the bulky goods MTA incorporates approximately 323,906 estimated residents, including the supermarket trade catchment. The resident population in the MTA is expected to grow by 0.5% per annum to 337,470 persons by 2016. The forecasts are based on Statistical Local Area (SLA) population projections from the NSW Department of Planning's (DoP) Transport Population and Data Centre (TPDC).
6. The current supermarket retail expenditure pool generated by the supermarket MTA in 2008 is estimated at \$335 million. Population growth and real growth in supermarket expenditure will increase the supermarket expenditure pool to \$350 million or by a further \$15 million by 2011.



7. The current bulky goods retail expenditure pool generated by the bulky goods MTA in 2008 is estimated at \$641 million. This is expected to increase by \$61 million to \$702 million by 2011. The total retail expenditure in the MTA is estimated to be about \$3.47 billion by 2011, thus includes the supermarket expenditure within the total bulky goods MTA.

### **Competitive Framework**

8. The competing retail centres define the trade area with several significant sub-regional and regional centres located just beyond the boundaries of the defined MTA including Centro Bankstown, Westfield Hurstville and Westfield Burwood. Centro Roselands falls within the supermarket catchment.
9. The area has a suitable retail hierarchy however there appears to be a market opportunity for further supermarket and major bulky goods retailing where the proposed site is, as the nearest competing 'centre' about 3.3km away at Roselands. The key existing centres within close proximity are Centro Roselands and Westfield Burwood which both lack a significantly sized bulky goods component, although both contain Myer Department stores.
10. None of the existing centres under assessment will provide a similar product, that is, the combination of supermarket, convenience and specialty floorspace with a significant proportion of bulky goods retail.

### **Assessment of Economic Impacts**

11. The proposed centre, with 24,854 m<sup>2</sup> of retail floorspace, is estimated to have a turnover of \$136 million if it were established in 2008. The anticipated retail offering will include:
  - A medium sized supermarket of 2,585 m<sup>2</sup> - estimated turnover of \$24.9 million.
  - Specialty retail of approximately 4,001 m<sup>2</sup> - estimated turnover of \$29.2 million.
  - Bulky goods and trade retail of approximately 18,268 m<sup>2</sup> - estimated turnover of \$82.2 million.
12. In order to understand the economic impacts upon existing centres within the current retail hierarchy, the effects of the proposed supermarket have been assessed upon competing medium and full-line supermarkets within a 5 km radius. Supermarkets have a significant influence on the direction of trade within a retail hierarchy as they provide a retail anchor that supports the visitation of a centre. While the impacts of the proposed bulky goods/trade component have been assessed against competing bulky goods centres, Canterbury Road's bulky goods offerings and other major bulky goods retailers.
13. With regard to the location, composition and performance of the surrounding supermarket framework, MacroPlan expect the impacts upon the existing centres to be insignificant. This is in part due to the proposed supermarket's medium sizing (2,585 m<sup>2</sup>), its distance to competing supply and the spread of centres across the supermarket MTA. The largest effects to be experienced are as follows:
  - -4.6%: Woolworths - Campsie
  - -4.6%: Food for Less - Campsie Centre
  - -3.7%: Flemings – Bexley North
  - -3.7%: Coles – Earlwood



14. It should be noted that several of the supermarkets within and just outside the MTA are trading above national standard levels and slight reductions in turnover will unlikely lead to centre closures.
15. With regard to the surrounding bulky goods framework, MacroPlan expect the impacts upon the existing centres to be insignificant. While there are several major bulky goods retailers within 5 km and just beyond the trade area, in general turnover for this type of retail is significant comprised of a beyond trade area draw. The largest effects are likely to be experienced as follows:
  - -13.1%: Canterbury Road
  - -6.7%: Harvey Norman – Wiley Park
  - -6.7%: Harvey Norman – Punchbowl

### Land Use Assessment

16. The mixed use development will contribute to both Canterbury LGA's dwelling and job targets, while providing the local community with competitive retail options and other uses, such as medical and business services.
17. The locality assessment shows that the subject site has excellent proximity to public transport infrastructure such as railway stations and local and strategic bus services. The subject site is also less than 275 metres from Canterbury Road and less than two (2) kilometres to the M5 Motorway which ensures that the subject site is easily accessible and ideal for bulky goods / retail uses.
18. In terms of built form, the surrounding locality is largely free standing residential dwellings on typical sized allotments of considerable age. The street pattern and carriageway widths indicate that there is good potential for future upgrades.

### Key Findings

19. The proposed development will draw a significant amount of trade from beyond the MTA defined in this study, as bulky goods centres tend to draw a higher proportion of trade from outside the immediate residential catchment. Thus, while there will be impacts upon the existing centres within and adjacent to MTA, these will be below industry accepted levels of significance.
20. MacroPlan believes that the proposed development represents proper and orderly development, with a retail offering that not only suits the existing hierarchy, but does not adversely impact upon any of the existing retailers within and just outside the MTA.
21. Although the modelling economic impacts upon Canterbury Road are somewhat high, but below industry standard levels of significance, these effects could in fact be mitigated as the proposed development may enliven the Canterbury Road 'enterprise corridor' if more shoppers are attracted to the area and use Canterbury Road.
22. The proposal will provide local job opportunities and convenience shopping options for the local residents and make of use of a site that currently has not had any uses for over 5 years. Other key net community benefits that the development will achieve include:
  - Employment generation (direct, indirect and on-going)
  - Increased rates revenue for Council which can in turn fund other community improvements





- Provision of community facilities (eg. Medical Services and Child Care)
  - Increase retail choice/competition for local residents
  - Co-location leading to multi-purpose car trips for consumers
  - Increased vitality of Canterbury Road with some flow on benefits to local businesses.
23. The development will integrate effectively with the adjacent residential dwellings, whose residents will be able to take advantage of the walkable options provided by the retail, commercial, community and medical facilities to be provided by the site. The site location will provide a central community focal point.
24. Further, the development could provide approximately 1,415 jobs as well as several hundred dwellings, which would contribute significantly to the South subregion's dwelling target and job targets as prescribed by the NSW Department of Planning in the South Subregional Strategy. These jobs will be located near a significant workforce as well as near quality public transport provided by Canterbury Road.
25. The mixed use development actively enhances the community through its diversity of product and land use integration while the turnover impacts upon competing retailers, including Canterbury Road, fall below standard industry levels of significance. MacroPlan believe this mixed use development to be suitable for the Canterbury community and adheres to sound planning and economic principles.



# 1 Introduction

## 1.1 Scope of this report

MacroPlan have been commissioned by Parkview Sydney Developments to undertake a retail and bulky goods economic impact and land use assessment in relation to their site at Clemton Park. The study was requested by the Director General of the Department of Planning to understand the impacts the proposed mixed use development upon the site, including convenience, supermarket and specialty retail, bulky goods retail (currently permissible under the zoning), commercial and residential uses under Part 3A of the Act.

The economic impact assessment provides an analysis of the existing supply and demand conditions within Clemton Park and surrounds, to assess the timing and quantum of sustainable floorspace for retail development, with respect to existing centres in the local and regional catchment. The aim of this analysis is to outline the potential economic implications to the existing retail framework.

## 1.2 Abbreviations

The following abbreviations are used in this report

ABS	Australian Bureau of Statistics
ANZSIC	Australian & New Zealand Standard Industrial Classification
CPI	Consumer Price Index
DDS	Discount Department Store
EIA	Economic Impact Assessment
GST	Goods and Services Tax
HES	Household Expenditure Survey
LGA	Local Government Area
MDS	Market Data Systems
MTA	Main Trade Area
PCA	Property Council of Australia
PTA	Primary Trade Area
SLA	Statistical Local Area
STA	Secondary Trade Area

## 1.3 Methodology

MacroPlan has engaged a trade area based EIA methodology for the assessment of trade impacts that are likely to be incurred by the introduction of the proposed development upon the existing retailing network within the region.

The methodology used for this assessment is detailed overleaf.



#### 1. Defining the trade area and forecasting growth.

A trade area is a geographical area from which a shopping centre will draw the majority of future trade. The delineation of a trade area typically comprises a primary, secondary, and in some circumstances, tertiary trade area. Trade areas are defined by the following factors, which are distinct to each development proposal:

- The proposed development type and merchandise sold
- Site location including access and exposure
- Proximity, role and function of existing competing shopping centres.
- Natural and man-made barriers.

Primary research relating to comparable centres and extensive trade area experience are also used to identify trade areas.

#### 2. Defining the current and future expenditure of the trade area.

Trade area expenditure is tied to the socio-economic circumstances of a given location. Expenditure information is derived from the Household Expenditure Survey (HES) conducted by the ABS and the MarketInfo database. MarketInfo is an independent consultancy used by the majority of retail economists to derive accurate retail expenditure data at a CCD level in Australia. MarketInfo has developed a micro-simulation technique that utilises over 40 socio-economic variables in each CCD to produce accurate retail expenditure results.

#### 3. Identification of competing centres and performance.

It is important to detail the tenancy and floorspace of all competing centres. Competing centres are those shopping locations that are considered to be also drawing trade from within the identified trade area for the proposed development. Performance figures are derived from the Property Council for larger sites and from the Australian Bureau of Statistics (ABS) for smaller sites based on average performance by tenancy types.

#### 4. Identification of proposed development performance and market shares.

Identification of performance is based on industry averages as recorded by the ABS Retail Census.

#### 5. Economic impact on competing centres

The proposed development will impact on the trading performance of the surrounding retail network to varying degrees. This impact is measured in terms of a reduction in turnover at a centre level. A centre is typically defined as a standalone shopping centre or town centre.

#### 6. Net Community Benefits of the proposed development

A new retail development will alter the local economic and social environment of the locality. This alteration can be measured in net terms by indicators such as employment, time cost savings, travel cost savings etc.

The outcome of this analysis is to provide a detailed justification to the Department of Planning and key stakeholders of the development sustainability on the subject site.



## 1.4

### Information Sources

This report draws on a wide range of information sources. The more important information sources include:

- Census of Population and Housing, Australian Bureau of Statistics (2006);
- New South Wales Shopping Centre Directory, Property Council of Australia (2007);
- Household Expenditure Survey, Australian Bureau of Statistics (2003–04).
- MarketInfo 2006, MDS Market Data Systems (2006).
- Census of Retail Activity, Australian Bureau of Statistics (1992, 1998/99).
- Monthly Retail Trade data, Australian Bureau of Statistics.
- Site visits of subject site and surrounding competing centres.
- Consumer Price Index, Australian Bureau of Statistics.
- Relevant experience associated with other shopping centres throughout New South Wales and Australia, with particular reference to customer survey information, trade areas, turnover performance and market shares.

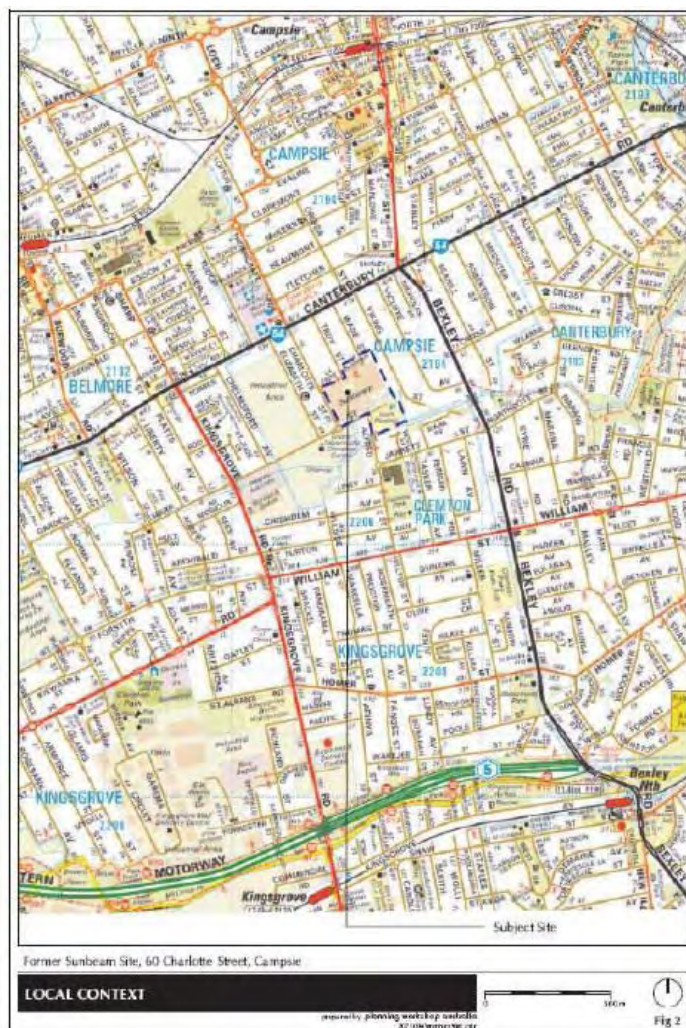


## 2 Background

### 2.1 Site Location

The Clemton Park site is located on the border of Campsie and Clemton Park bordered by Sunbeam Lane to the north, Charlotte St and Harp St to the west, Alfred St to the south and Viking St to the east. The site is located approximately 12 km from the Sydney CBD, approximately 1 km south of Campsie Town Centre and 250m south of Canterbury Road, which runs adjacent to the site accessible via Bexley Rd or Charlotte St.

Figure 1. Clemton Park Suburb



Source: Planning Workshop Australia (2007)



## 2.2

### Discussion of site

Parkview Sydney Development's site incorporates two lots defined as Lot 1 DP 721721 and Lot A DP 431356. The total site area of approximately 5.5 ha, is expected to generate 87,332 m<sup>2</sup> of building floorspace and approximately 1,415 employees. The proposed development will provide a mixed of use floorspace as follows:

**Table 1. Site Configuration and Employment Generation**

	Floor space (m <sup>2</sup> )	RATIO	Total Employees
<b>Lot 1</b>			
Trade retail	3301	55	60
Bulky goods	14967	43	348
Specialty retail	1250	24	52
Commercial	5948	15	397
Gym	1253	EFT	25
Mall	3455	0	0
lobby	193	0	0
<b>total</b>	<b>30367</b>		
<b>Lot 3</b>			
Residential	5897	1000	6
Child Care	636	34	19
<b>total</b>	<b>6533</b>		
<b>Lot 2</b>			
Residential	17952	1000	18
Convenience Retail	2751	24	115
Supermarket	2585	24	108
Medical	3719	EFT	200
<b>total</b>	<b>27007</b>		
<b>Lot 4</b>			
Residential	6802	1000	7
<b>total</b>	<b>6802</b>		
<b>Lot 5</b>			
Residential Senior (ILU)	10823	800	14
Residential Senior (RAC)	5800	125	46
<b>total</b>	<b>16623</b>		
<b>Total</b>	<b>87,332</b>		<b>1415</b>

Source: Planning Work Shop Australia (2007), MacroPlan (2008)

#### 2.2.1 Retail Component

The retail component of the site, upon which this report is focused, comprises a total of 24,854 m<sup>2</sup> of Gross Floor Area Retail (GLAR) outlined as follows: This retail is detailed as a mix of:

- Convenience, Specialty and Supermarket (CSS): 6,586 m<sup>2</sup>
  - Supermarket = 2,585 m<sup>2</sup>
  - Specialty/Convenience = 4,001 m<sup>2</sup>



- Bulky Goods/Trade (BGS): 18,268 m<sup>2</sup>
  - Bulky Goods = 14,967 m<sup>2</sup>
  - Trade = 3,301 m<sup>2</sup>

It is expected that the first full-year of trading for the retail of this site will be 2011.



## 3 Market Context

### 3.1 Trade Area Analysis

Shopping centre trade areas are an important determinant of sustainable retail floorspace and turnover. As part of this study, the trade area for the proposed development has been delineated to accurately assess the expenditure levels, competition and the socio-economics of the retail catchment.

#### 3.1.1 Identification of Trade Areas

The principal factors in the determination of retail trade areas are:

##### A. Shopping Centre Type

The first factor to consider when determining a trade area is the type of proposed development. Retail developments vary in size, quality and function and the NSW Government's Metropolitan Strategy (note: Canterbury is in the South subregion) has developed a retail hierarchy based on these factors. The retail hierarchy begins with larger strategic centres such as Global Sydney, Regional City, Specialised Centre and Major Centre, and continues through to Local Centres including Town Centre, Stand Alone Shopping Centre, Village, Small Village and Neighbourhood Centre

##### B. Main Trade Areas

The second factor to consider when determining a trade area is the concept of main trade area and beyond the trade area. Depending on competition and the geography of the surrounding area, main trade areas commonly provide 75-90% of sales for a given centre whilst spend from beyond the trade area can provide for 10-25% of sales.

Other issues to consider and that are important in this assessment include:

- Potential development type, i.e. supermarket / neighbourhood centres have the primary function of providing for the retailing needs of the local community / township, while bulky goods developments will draw from a wider catchment
- Site location, including the available road network and public transport system. This influences the ease of access and exposure to the development.
- Proximity and pattern of existing and potential competitors. The relative attraction of the centre compared to alternative competing centres is assessed according to the scale, composition, quality, size and diversity of retail services provided in those centres and stores.
- Physical barriers, such as, lakes, railways and freeways can affect the size and composition of trade catchments.

With reference to the above factors, three trade areas have been defined below. A primary, secondary and tertiary trade area

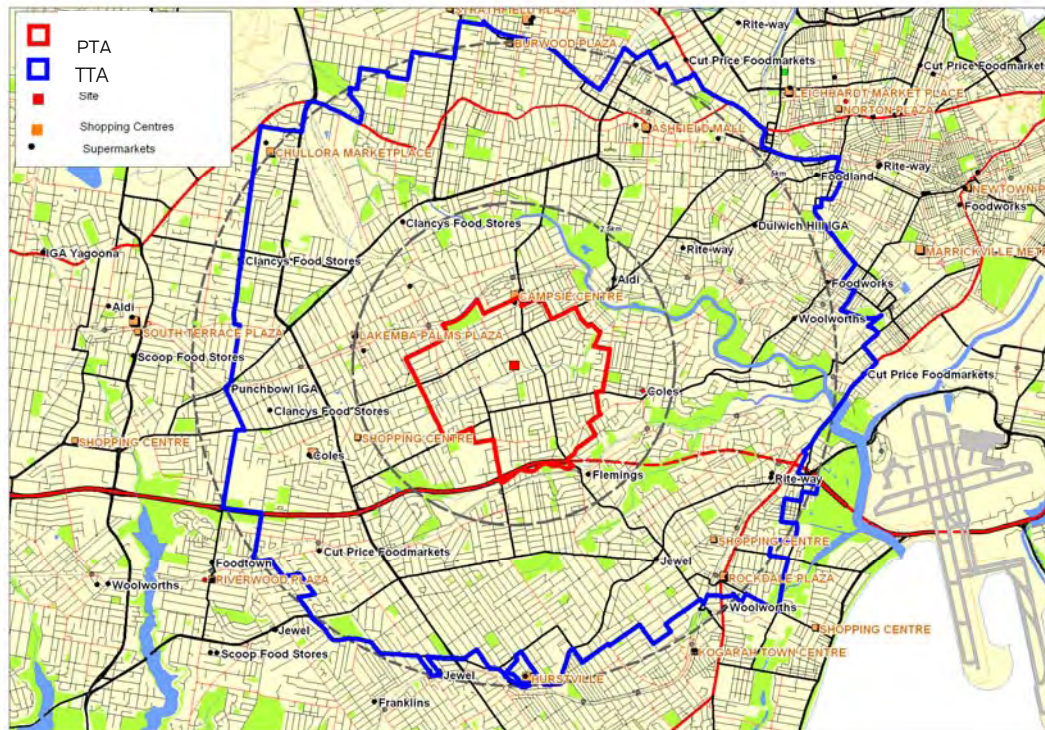
- The Primary Trade Area (PTA) comprises of a catchment within a 1km radius of the proposed development, and will generate approximately 75% of the supermarket turnover.





- The Secondary Trade Area (STA) extends roughly 2km around the proposed development. The STA has been constructed to further assess trade and impacts for the supermarket component of the proposed development, albeit with lower market shares. Combined with the PTA it forms the supermarket Main Trade Area (MTA) as well as the PTA for the bulky goods component of the proposed development.
- The Tertiary Trade Area (TTA) has been constructed to understand the expenditure pool that the bulky goods component of the proposed development will draw trade from. It has a radius of approximately 5km. The convenience, supermarket and specialty (CSS) component of the development will draw a very low market share of this trade area.

**Figure 2. Main Trade Area – Sunbeam Site**



Source: CData (2006), MacroPlan Australia (2008)

## 3.2 Demand Framework

Accurate representation of the demand framework for a particular development is critical in ensuring the future sustainability of both the new centre and its competitors.

The source from which retailers around Clemton Park generate turnover is complex. The two main contributors to retail turnover include:

- Main Trade Area (MTA) Residents: Those persons that reside for the majority of the year in Clemton Park and surrounds; and
- Shoppers from outside the trade area: Including workers in the area and potential passing traffic from the Canterbury Road and surrounding arterial roads.



Combined, these two groups generate demand for a wide range of retail goods and services in the suburbs around Clemton Park. The following sections assess expected growth in the volume of permanent residents subject to existing and forecasted population growth.

### 3.3 Main Trade Area Population

Aside from cyclical macro economic conditions, affecting the wealth and spending abilities of the community, dramatic changes in retail demand occur, in the main, as a result of growth or decline in a population. While compositional changes of a population and changing consumer preferences influence the format and offer of retail available, it is population growth that primarily drives additional retail demand.

#### 3.3.1 Existing Population

All demographic forecasts rely on a variety of historical information. This historical information forms the basis for decisions concerning future events. Forecasting is therefore influenced by a wide range of economic and social trends.

The trade area population forecasts have involved consideration of the following information sources:

- 2006 ABS Census of Population and Housing
- NSW Statistical Local Area Population Projections 2001 – 2031 (NSW Department of Planning, 2005)

The existing population for the MTA has been calculated by collecting usual resident population from the 2006 ABS Census of Population and Housing. The estimate of usual resident (UR) is then adjusted<sup>1</sup> to calculate the estimated resident population (ERP).

#### 3.3.2 Forecast Population

As the trade area is relatively established, population growth rates used were based on the growth rates of the SLAs included in the trade catchments as published by the NSW Department of Planning's Transport and Population Data Centre (TPDC) 2005 release.

Accordingly, the mature residential market and land release lead to the forecasts for the displaying limited growth. These growth rates have then been applied to the defined main trade area population for the proposed development subject to the population recorded in the 2006 ABS Census. The MTA population is forecast to increase from 323,906 persons to 330,160 people by 2011, an increase of 6,254 persons by the first full year of retail trade at the site.

It should be noted that the Draft South Subregional Strategy outlines a housing target of 35,000 dwellings through to 2031, with an estimated 7,100 of these to be delivered in Canterbury LGA.

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<sup>1</sup> ERP and Usual Residents are different measures of population. The Census counted usual resident, that is, whoever was in Australia, wherever they happened to be, on Census Night (8 August 2006) – a frozen snapshot in time. However the estimated resident population figure takes into account the wider picture and moves people back to where they live. For example, Australians temporarily overseas are not counted in the Census, but they are accounted-for in the estimated resident population figures.



Table 2. Trade Area Forecast Population, 2008–2016

	Actual		Forecast			
Trade Area	2008	2009	2010	2011	2012	2016
Primary Trade Area	24,431	24,481	24,532	24,582	24,626	24,670
<i>average growth pa</i>		0.2%	0.2%	0.2%	0.2%	0.0%
Secondary Trade Area	88,105	88,424	88,746	89,070	89,298	89,527
<i>average growth pa</i>		0.4%	0.4%	0.4%	0.3%	0.1%
Tertiary Trade Area	235,801	237,546	239,309	241,090	242,305	247,252
<i>average growth pa</i>		0.7%	0.7%	0.7%	0.7%	0.7%
Main Trade Area	323,906	325,970	328,055	330,160	331,602	337,470
<i>average growth pa</i>		0.6%	0.6%	0.6%	0.4%	0.4%

Source: MacroPlan Australia (2008).

The population estimates listed in the table above are combined with levels of retail expenditure per capita to develop a forecasted expenditure pool for a range of retail items and categories.

## 3.4 Trade Area Expenditure

The retail expenditure levels from which the proposed development will draw trade can be expected to increase in future years as a result of the following factors:

- Trade area growth (i.e. forecast changes in the identified demand segments); and
- Real growth in retail expenditure, which indicates increased propensity of retail consumption above inflation.

Having addressed the issue of catchment growth in the previous section, this section focuses on assessing regional spending characteristics (i.e. profiles) and macro level changes in retail expenditure growth. This section concludes with the identification of the total retail expenditure pool split into supermarket and bulky goods expenditure.

### 3.4.1 Expenditure Profile

The expenditure profile of residents varies across Australia and is primarily determined by income. MacroPlan has identified regional spending profiles based on the aggregation of MarketInfo small area retail estimates (i.e. built up from CCD level).

MacroPlan considers MarketInfo to be the current best practice data source used in the calculation of retail expenditure. MarketInfo is a micro-simulation model developed by MDS Market Data Systems Pty Ltd. This model is based on information from the national ABS Household Expenditure Survey (HES), the Census of Population and Housing as well as other information sources (i.e. ABS National Accounts, Australian Tax Office Statistics, Medicare data etc), and uses micro-simulation techniques to combine propensity to spend on particular commodities with socio-economic characteristics of individuals.

The expenditure profile for the trade area has been developed according to 11 key retail spending categories, under the broad groupings of:

- Convenience, Supermarket and Specialty (CSS); and
- Bulky Goods Retailing (BGR).



**Figure 3. Retail Spending Categories**

Convenience, Supermarket and Specialty	Bulky Goods Retailing
1. Supermarket	8. Furniture and Whitegoods
2. Catering (Restaurant and Café)	9. Electrical
3. Clothing and Accessories	10. Houseware and Softgoods
4. Sports and Hobbies	11. Hardware
5. Services	
6. Newsagent and Chemist	
7. Bottle-shop	

Source: MacroPlan Australia (2008).

MacroPlan has assessed retail expenditure per capita across the current residents of the trade areas. In 2008, average retail expenditure per capita in the MTA is estimated at \$10,230, with supermarket expenditure accounting for \$3,878 per capita and bulky goods accounting for \$1,980 per capita. The figure below disaggregates these into the PTA, STA and TTA. The PTA has a lower spend per capita than the rest of the trade area, but this would probably be boosted by residents relocating to proposed dwelling development.

**Table 3. Expenditure per capita, 2008**

Average annual retail expenditure per capita, 2008			
	PTA	STA	TTA
<b>Supermarket</b>	<b>\$3,722</b>	<b>\$3,715</b>	<b>\$3,822</b>
Catering (Restaurant and Café)	\$1,409	\$1,419	\$1,629
Clothing and Accessories	\$960	\$969	\$1,070
Furniture and Whitegoods	\$660	\$664	\$719
Electrical	\$606	\$608	\$682
Houseware and Softgoods	\$233	\$236	\$280
Hardware	\$252	\$253	\$259
Sports and Hobbies	\$255	\$258	\$297
Services	\$330	\$333	\$379
Newsagent and Chemist	\$590	\$594	\$651
Bottle-shop	\$441	\$444	\$483
<b>Total Bulky Goods (BGS)</b>	<b>\$1,751</b>	<b>\$1,762</b>	<b>\$1,940</b>
<b>TOTAL RETAIL</b>	<b>\$9,458</b>	<b>\$9,494</b>	<b>\$10,271</b>

Source: MDS Market Data Systems - Marketinfo (2006).

Given the nature of the retail facility proposed (eg. mainly bulky goods and supermarket floorspace) the total growth in retail expenditure has been considered and is disaggregated according to bulky goods and supermarket expenditure.

### 3.4.2 Real Growth in Retail Expenditure

Retailing within the trade area can be expected to increase in future years as a result of the increase in resident population and real growth in retail expenditure. A historical estimate of real growth in retail expenditure is based on an analysis of the ABS Retail Trade publication. Real growth in retail expenditure has been estimated at 1.1% per annum. It is important to note that price inflation has been excluded from the analysis of available retail expenditure in order to present future market forecasts.



### 3.4.3 Total Retail Expenditure Pool

Total retail expenditure levels within the trade areas in 2008 and future years are assessed by combining the population forecasts presented in the previous section with average per capita expenditure levels allowing for real growth in retail sales. These estimates are then added to the assumed expenditure from beyond the trade area estimate the total retail expenditure pool.

A summary of forecast retail expenditure generated from within the MTA over the next 8 years to 2016 is provided in the table below. This has been divided into a supermarket expenditure pool for the concise supermarket catchment and a bulky goods expenditure pool for a broader bulky goods catchment.

**Table 4. Supermarket MTA Expenditure Pool (\$m), 2008 - 2016**

Trade Area	Actual		Forecast			
	2008	2009	2010	2011	2012	2016
<b>Supermarket Market Size (\$m)</b>						
<b>Primary Trade Area</b>	92.9	94.2	95.4	96.6	97.9	99.1
<i>average growth per annum</i>		1.3%	1.3%	1.3%	1.3%	0.3%
<b>Secondary Trade Area</b>	242	245	249	253	257	260
<i>average growth per annum</i>		1.5%	1.5%	1.5%	1.4%	0.3%
<b>Main Trade Area</b>	335	340	345	350	354	359
<i>average growth per annum</i>		1.5%	1.5%	1.5%	1.4%	0.3%
<b>Spend per capita</b>	\$3,799	\$3,841	\$3,883	\$3,926	\$3,969	\$4,012

Source: MacroPlan Australia (2008).

**Table 5. Bulky Goods and Total Retail MTA Expenditure Pool (\$m), 2008 - 2016**

Trade Area	Actual		Forecast			
	2008	2009	2010	2011	2012	2016
<b>Bulky Goods Market Size (\$m)</b>						
<b>Primary Trade Area</b>	161.7	166.2	170.8	175.6	180.3	185.1
<i>average growth per annum</i>		2.8%	2.8%	2.8%	2.7%	0.7%
<b>Secondary Trade Area</b>	479.6	494.8	510.4	526.5	541.9	557.7
<i>average growth per annum</i>		3.2%	3.2%	3.2%	2.9%	0.7%
<b>Main Trade Area</b>	641.4	661.0	681.2	702.1	722.1	742.7
<i>average growth per annum</i>		3.1%	3.1%	3.1%	2.9%	0.7%
<b>Spend per capita</b>	\$1,980	\$2,028	\$2,077	\$2,127	\$2,178	\$2,230
<b>Total Retail Market Size (\$m)</b>						
<b>Primary Trade Area</b>	848.3	859.0	869.9	881.0	891.2	901.6
<i>average growth per annum</i>		1.3%	1.3%	1.3%	1.2%	0.3%
<b>Secondary Trade Area</b>	2465.4	2505.9	2547.2	2589.2	2625.7	2662.8
<i>average growth per annum</i>		1.6%	1.6%	1.7%	1.4%	0.4%
<b>Main Trade Area</b>	3313.7	3364.9	3417.1	3470.2	3516.9	3564.4
<i>average growth per annum</i>		1.5%	1.6%	1.6%	1.3%	0.3%
<b>Spend per capita</b>	\$10,230	\$10,323	\$10,416	\$10,511	\$10,606	\$10,702

Source: MacroPlan Australia (2008).



In 2008, the total retail expenditure that the MTA is estimated to generate is \$3.317 billion, increasing to \$3.470 billion by 2011, the estimated first full year of trading. Total supermarket expenditure is currently estimated at \$1.256 billion for the MTA, however only a small share of this will contribute to the supermarket trade at the site, with the majority of the supermarket turnover expected to be derived from the supermarket MTA expenditure pool of \$335 million. The total bulky goods expenditure is estimated at \$613.8 million increasing to \$629.0 million by 2011.

The growth in the total retail expenditure pool, and associated supermarket and bulky goods expenditure growth means that there is an opportunity to provide further floorspace within the trade catchment. It should be noted that there will be some beyond trade area draw, in addition to leakage of this expenditure pool.



## 4 Competitive Framework

MacroPlan has assessed the surrounding retail competition within the vicinity of the proposed development site to provide an understanding of the key retail facilities which would compete and hence be affected by the proposed development. The supply of retail centres, specifically accommodating significant supermarket and bulky goods retailers are listed in the tables below.

### 4.1 Supermarket

The supermarket supply assessment below confirms that there are no full-line major supermarkets within the supermarket MTA. Although MTA residents will travel to supermarkets beyond the defined MTA, the distance travelled by most will be less than 2km to 3 km, noting the MTA, particularly the PTA is defined by the surrounding supermarket supply.

These supermarkets will have their turnover impacts as a result of the proposed development estimated in Section 5 of this report.

**Table 6. Shopping Centres (2008) - Supermarket**

Centre Name	Address	Centre Type	Distance from site (km)	Total Centre Floorspace (m2.)	Supermarket Floorspace (m2)
Campsie (WW)	62-72 Evaline St	Stand Alone	1.2	2,500	2,500
Campsie Centre	14-28 Amy St	Sub-Regional	1.4	13,068	1,177
Flemings - Bexley North		Stand Alone	1.9	2,000	2,000
Earlwood (Coles)	5-15 Clarke St	Stand Alone	2.0	1,650	1,650
Aldi - Canterbury	73 Jefferey St	Stand Alone	2.0	2,500	2,500
Belfield Plaza	Burwood Rd & Downes St.	Local Shops	3.0	2,000	500
Centro Roselands	Roselands Drive	Major-Regional	3.3	59,521	6,349
Rockdale SC	499 Princes Hwy	Sub-Regional	4.4	2,000	500
Ashfield Mall	260 Liverpool Rd	Sub-Regional	4.4	24,589	5,122
Westfield Hurstville	Cross St & Park Rd	Major-Regional	4.5	59,324	4,875
Hurstville Super Centre	225 Forest Rd	Neighbourhood	4.6	6,050	2,200
Kogarah Town Centre	1 Railway Pde	Neighbourhood	4.9	5,176	2,381
Rockdale Plaza	616 Princes Hwy	Sub-Regional	4.9	21,130	2,583
Westfield Burwood	100 Burwood Road	Major-Regional	5.6	56,204	7,544
Centro Bankstown	North Terrace	Major-Regional	5.8	77,666	6,200
Marrickville Metro	34 Victoria Road	Sub-Regional	5.6	23,230	6,133
Chullora Marketplace	355-357 Waterloo Road	Sub-Regional	5.3	17,254	4,207
South Terrace Plaza	212 Stacey Street	Neighbourhood	5.9	3,230	2,200

Source: PCA NSW/ACT Shopping Centre Directory (2007), MacroPlan Australia (2008).

### 4.2 Bulky Goods

There are bulky goods centres, as defined by the Property Council of Australia (PCA) within the MTA, with the closest being the combined Home Central and Homemaker City precinct located in Bankstown, over 6km to the west. Most of the other competing major retailers are located towards the perimeter of the MTA. An estimate of the total amount of bulky goods retail along Canterbury Road has been included. A brief summary of the competing supply is outlined below. The turnover impacts of these retailers are assessed in Section 6 of this report.



Table 7. Shopping Centres (2008) – Bulky Goods

Centre Name	Address	Centre Type	Distance from site (km)	Total Bulky Floorspace (m2)
Harvey Norman - Wiley Park	1018 Canterbury Rd	Stand-Alone	2.7	4,000
Harvey Norman - Punchbowl	1155 Canterbury Rd	Stand-Alone	3.0	4,000
Home Central	Chapel Rd	Sub-Regional	6.8	17,863
Homemaker City	Canterbury Rd & Chapel	Sub-Regional	6.9	18,574
Canterbury Road - Various	Canterbury Rd	Specialty / Themed	1.0	20,000
Bunnings - Rockdale	383 West Botany	Specialty / Themed	5.0	10,000
Bunnings - Leichhardt	Parramatta Rd & Frederick	Specialty / Themed	4.4	10,000
Bing Lee - Hurstville Plaza	Rockdale Plaza	Specialty / Themed	4.5	2,000
Bing Lee - Marrickville	326 Marrickville Rd	Specialty / Themed	5.0	2,000
Bing Lee - Burwood	103 Burwood Rd	Specialty / Themed	5.6	2,000
Good Guys - Rockdale	383-391 Princes Hwy	Specialty / Themed	4.8	2,000

Source: PCA NSW/ACT Shopping Centre Directory (2007), MacroPlan Australia (2008).

The two centre-based bulky goods precincts and the offerings along Canterbury Road are discussed in further depth below.

#### 4.2.1 Homemaker City – Bankstown

Homemaker City is located about 7km from the proposed development site along Canterbury Road. The total GLAR of the centre is 18,574 m2 of which 9,998 m2 are major tenants including:

- Freedom Furniture - 3,517 m2
- Bing Lee – 1,938 m2
- Dick Smith – 1,738 m2

There are 13 other outlets totalling 8,576 m2. The majority of the stores in this centre specialise in furniture and homewares.

#### 4.2.2 Home Central – Bankstown

Home Central at Bankstown is located about 7km from the proposed development site along Chapel Road, directly adjacent to Homemaker City. The total GLAR of the centre is 17,863 m2, anchored by a 2,003 m2 Good Guys, 1,671m2 fitness first and 1,551m2 Toys 'r' Us. The other 12 stores include music, furniture, carpets, lighting, car accessories and baby goods stores.

#### 4.2.3 Harvey Norman – Wiley Park

The Harvey Norman at Wiley Park is located about 2.7 km from the proposed development site. This store carries retail categories including bedding, computers, electrical, floor supplies, furniture and hardware. The store has been estimated to be approximately 4,000 m2 in size, based upon the average size of Harvey Norman stores listed within the PCA Shopping Centre Directory.





#### **4.2.4 Harvey Norman – Punchbowl**

The Harvey Norman at Punchbowl is located a further 700 metres to the West of the Wiley Park Harvey Norman, about 3.4 km from the proposed development site. This store specialises in hardware, bathroom and tiles retailing. It has been estimated that this store is of a similar size to the Harvey Norman at Wiley Park.

#### **4.2.5 Canterbury Road Strip Bulky Goods Retail**

Canterbury Road accommodates a mixture of property and business services, convenience type retailing, clothing and accessories and bulky goods retailing. The bulky goods retailing has been estimated to be in the order of 20,000m<sup>2</sup> for the purposes of measuring the turnover impacts for this assessment. Some examples of the retailing along this road include:

- Mitre 10
- Auto accessories / spare parts
- Lighting stores
- Furniture Stores
- Bathroom accessories
- Kitchen / Homewares
- Paints and Tiles
- Timber and Hardware



## 5 Supermarket - Market Share & Impact Analysis

This section examines the level of sales and the resulting market shares in 2011 with and without the proposed development. Market shares are the proportion of the proposed sales attributable to residents in the supermarket MTA or drawn from outside the trade area.

The market shares in this section are calculated based on the share of supermarket expenditure, with Bulky Goods market shares and impacts assessed separately in the following section due to the different nature of the trade area catchments for the different types of retail.

### 5.1 Market Potential

The new centre's sales would be drawn from a combination of the projected growth in the expenditure pool and a sales draw from existing retailers in and adjacent to the supermarket MTA.

In terms of market shares the following assumptions have been made regarding the proposed development:

- 75% of supermarket expenditure is from residents within the Primary Trade Area;
- 25% of supermarket expenditure is from residents within the Secondary Trade Area; and
- 10% of supermarket expenditure is drawn from Beyond the Trade Area.

The sales potential for the proposed development takes into consideration the road network, the accessibility of the site and the catchment from which a medium scale supermarket offer would generate its turnover. The table below outlines the estimated market potential of the proposed development

**Table 8. Market Potential, 2011**

2011 - First full year of trading			
Average Sales			
Proposed Centre	GLA (m2)	(\$m)	(\$/m2)
Supermarket	2,585	\$24.94	\$9,647
Convenience (non-super)	4,001	\$29.18	\$7,294
Bulky Goods/Trade	18,268	\$82.21	\$4,500
<b>Total Centre</b>	<b>24,854</b>	<b>\$136.33</b>	<b>\$5,485</b>

Source: MacroPlan Australia (2008).

The proposed centre is expected to generate approximately \$136 million in retail expenditure of which \$24.9 million will be from the supermarket component. The average turnover for major supermarkets (national, full line) is approximately \$9,000 - \$10,000 / m2. The expected turnover of the supermarkets in the proposed centre is thus calculated at \$9,647 / m2.

### 5.2 Market Shares without Proposal

The table below shows the levels of sales in 2011 as would be achieved by existing retail centres without the proposed supermarket component of the development. The analysis reveals the assumed existing trading environment in Clemton Park and surrounding suburbs net of the Parkview Sydney Developments proposed development.



The floorspace estimates for each store have been derived from the Property Council of Australia Shopping Centre Directory NSW/ACT 2007, and where these figures were not available, using MacroPlan's best estimates.

**Table 9. Market Share Analysis without Proposal, 2011**

2011 - Without Proposal	Centre Details		Main Trade Area (MTA)		Beyond Trade (BTA)	
Centre Name	Floorspace (m2)	Turnover (\$m)	% MTA Spend	\$ MTA Spend	% BTA Spend	\$ BTA Spend
Woolworths - Campsie	2,500	\$24.8	5.8%	\$19.9	20%	\$4.97
Campsie Centre	1,177	\$11.7	2.8%	\$9.4	20%	\$2.34
Flemings - Bexley North	2,000	\$19.9	4.1%	\$13.9	30%	\$5.96
Coles - Earlwood	1,650	\$16.4	3.4%	\$11.5	30%	\$4.92
Aldi - Canterbury	2,500	\$24.8	3.7%	\$12.4	50%	\$12.42
Belfield Plaza	500	\$5.0	0.7%	\$2.5	50%	\$2.49
Centro Roselands	6,349	\$63.1	9.3%	\$31.5	50%	\$31.55
Rockdale SC	500	\$5.0	0.2%	\$0.7	85%	\$4.23
Ashfield Mall	5,122	\$50.9	2.2%	\$7.6	85%	\$43.28
Westfield Hurstville	4,875	\$48.5	2.1%	\$7.3	85%	\$41.20
Hurstville Super Centre	2,200	\$21.9	1.0%	\$3.3	85%	\$18.59
Kogarah Town Centre	2,381	\$23.7	1.0%	\$3.6	85%	\$20.12
Rockdale Plaza	2,583	\$25.7	1.1%	\$3.9	85%	\$21.83
Westfield Burwood	7,544	\$75.0	5.5%	\$18.7	75%	\$56.25
Centro Bankstown	6,200	\$61.6	2.6%	\$8.9	86%	\$52.71
Marrickville Metro	6,133	\$61.0	2.7%	\$9.1	85%	\$51.83
Chullora Marketplace	4,207	\$41.8	2.5%	\$8.4	80%	\$33.46
South Terrace Plaza	2,200	\$21.9	0.6%	\$2.2	90%	\$19.69
Other / Escape			49%	\$175.3		

Source: MacroPlan Australia (2008).

The key points from the table above include:

- Centres with the largest market share of MTA spend include Centro Roselands (9.3%), Woolworths Campsie (5.8%) and Westfield Burwood (5.5%).
- Food for Less within Campsie Centre, Woolworths at Campsie, Flemings at Bexley North and Coles Earlwood all draw 70% or more of their trade from within the MTA.
- All centres in the analysis draw some trade from within the supermarket MTA, as such the expected impacts are dissipated across all retailers and as such there are not huge impacts upon any individual stores.

## 5.3 Market Shares with Proposal

The table below outlines the estimated market shares of the existing retail centres with the development of the proposed supermarket component at the Sunbeam site in 2011, in accordance with the assumed turnover figures as identified in previous sections.



Table 10. Market Share Analysis with Proposal , 2011

2011 - With Proposal	Centre Details		Main Trade Area (MTA)		Beyond Trade (BTA)	
Centre Name	Floorspace (sqm)	Turnover (\$m)	% MTA Spend	\$ MTA Spend	% BTA Spend	\$ BTA Spend
<b>Proposed Development</b>	<b>2,585</b>	<b>\$24.9</b>	<b>12%</b>	<b>\$22.4</b>	<b>10%</b>	<b>\$2.49</b>
Woolworths - Campsie	2,500	\$24.6	6%	\$19.8	19%	\$4.80
Campsie Centre	1,177	\$11.2	3%	\$9.0	20%	\$2.26
Flemings - Bexley North	2,000	\$19.2	4%	\$13.4	30%	\$5.81
Coles - Earlwood	1,650	\$15.9	3%	\$11.1	30%	\$4.80
Aldi - Canterbury	2,500	\$24.1	3%	\$11.9	50%	\$12.18
Belfield Plaza	500	\$4.9	1%	\$2.4	50%	\$2.45
Centro Roselands	6,349	\$61.3	9%	\$30.3	50%	\$30.94
Rockdale SC	500	\$4.9	0%	\$0.7	85%	\$4.21
Ashfield Mall	5,122	\$50.6	2%	\$7.5	85%	\$43.13
Westfield Hurstville	4,875	\$48.1	2%	\$7.1	85%	\$41.05
Hurstville Super Centre	2,200	\$21.7	1%	\$3.2	85%	\$18.52
Kogarah Town Centre	2,381	\$23.5	1%	\$3.5	85%	\$20.05
Rockdale Plaza	2,583	\$25.5	1%	\$3.8	85%	\$21.75
Westfield Burwood	7,544	\$74.1	5%	\$18.3	75%	\$55.88
Centro Bankstown	6,200	\$61.3	3%	\$8.8	86%	\$52.57
Marrickville Metro	6,133	\$60.6	3%	\$8.9	85%	\$51.64
Chullora Marketplace	4,207	\$41.5	2%	\$8.2	80%	\$33.32
South Terrace Plaza	2,200	\$21.8	1%	\$2.2	90%	\$19.66
<b>Other / Escape</b>			<b>46%</b>	<b>\$161.0</b>		

Source: MacroPlan Australia (2008).

## 5.4

## Economic Impacts

### 5.4.1 Direct Economic Impacts

This section provides an analysis of the potential economic impacts that the proposed development will have on the existing and future operating performance of existing competing supermarkets. The analysis demonstrates economic impact in both dollar terms and the percentage of total sales at these centres.

Economic impacts are derived from the following assumptions:

- The proposed development is assumed for its first full year of trading in 2011. The impact assessment therefore considers the impact on other centres in 2011.
- Population in the supermarket MTA increases from 88,105 to 89,706 over the period 2008 to 2011.
- Supermarket expenditure in the supermarket MTA increases from \$335 million to \$350 million over the period from 2008 to 2011.
- Total growth is expressed in real terms, that is, inflation is excluded.
- The proposed development will increase the supermarket floorspace in the Clemton Park (Canterbury) area by about 2,585 m<sup>2</sup> which will achieve an estimated net turnover of \$24.9 million.



The economic impacts on existing centres, as detailed in the table below, are described in terms of both reduced turnovers at these centres and as a percentage of total sales from 2009 to 2011. It is noted that the proposed development will have impacts on other retailers not defined in the table, including bulky good stores, strips and other precincts. It is assumed that this impact is spread far and wide across a number of retailers.

**Table 11. Economic Impact Outcomes for Centres, 2011**

Centre Name	Size (m2)	Without Development		With Development		
		Sales (2009)	Sales (2011)	Sales (2011)	Impact (\$m)	Impact (%)
Woolworths - Campsie	2,500	\$24.1	\$24.8	\$23.7	-\$1.15	-4.6%
Campsie Centre	1,177	\$11.4	\$11.7	\$11.2	-\$0.54	-4.6%
Flemings - Bexley North	2,000	\$19.3	\$19.9	\$19.1	-\$0.73	-3.7%
Coles - Earlwood	1,650	\$15.9	\$16.4	\$15.8	-\$0.60	-3.7%
Aldi - Canterbury	2,500	\$24.1	\$24.8	\$24.0	-\$0.81	-3.2%
Belfield Plaza	500	\$4.8	\$5.0	\$4.8	-\$0.12	-2.4%
Centro Roselands	6,349	\$61.2	\$63.1	\$61.0	-\$2.05	-3.2%
Rockdale SC	500	\$4.8	\$5.0	\$4.9	-\$0.02	-0.5%
Ashfield Mall	5,122	\$49.4	\$50.9	\$50.6	-\$0.25	-0.5%
Westfield Hurstville	4,875	\$47.0	\$48.5	\$48.2	-\$0.24	-0.5%
Hurstville Super Centre	2,200	\$21.2	\$21.9	\$21.8	-\$0.11	-0.5%
Kogarah Town Centre	2,381	\$23.0	\$23.7	\$23.5	-\$0.12	-0.5%
Rockdale Plaza	2,583	\$24.9	\$25.7	\$25.5	-\$0.13	-0.5%
Westfield Burwood	7,544	\$72.8	\$75.0	\$74.0	-\$0.95	-1.3%
Centro Bankstown	6,200	\$59.8	\$61.6	\$61.4	-\$0.19	-0.3%
Marrickville Metro	6,133	\$59.2	\$61.0	\$60.6	-\$0.30	-0.5%
Chullora Marketplace	4,207	\$40.6	\$41.8	\$41.5	-\$0.36	-0.9%
South Terrace Plaza	2,200	\$21.2	\$21.9	\$21.8	-\$0.06	-0.3%
Other / Escape					N/A	N/A

Source: MacroPlan Australia (2008).

For competing supermarkets within an approximate 5km radius, the turnover effects were all below a generally accepted benchmark of 10%, with the greatest impacts experienced by the following centres:

- -4.6%: Woolworths - Campsie
- -4.6%: Food for Less - Campsie Centre
- -3.7%: Flemings – Bexley North
- -3.7%: Coles - Earlwood

Overall, the mixed use development will not cause significant adverse turnover effects upon existing supermarket retailers assuming a first year of full trading in 2011. The relatively small scale, (i.e. not full-line 2,585 m2), is part of the reason for this, as is the collocation with bulky goods retail which will draw from outside the supermarket MTA and thus minimise the effects on adjacent retailers. The reduced turnover will be adequately dissipated across most retailers.



## 6 Bulky Goods - Market Share Analysis

This section examines the level of sales and the resulting market shares for bulky goods in 2011 with and without the proposed development. These market shares are based upon the centres comprising the bulky goods supply within and adjacent to the bulky goods MTA.

### 6.1 Market Potential

The new centre's sales would be drawn from a combination of the projected growth in the expenditure pool and a sales draw from existing retailers in the bulky goods MTA.

In terms of market shares the following assumptions have been made regarding the proposed development:

- 50% of bulky goods expenditure is from residents within the Primary Trade Area;
- 25% of bulky goods expenditure is from residents within the Secondary Trade Area; and
- 25% of bulky goods expenditure is drawn from Beyond the Trade Area.

The sales potential for the proposed development takes into consideration the road network, the accessibility of the site and the larger catchment from which a bulky goods offer would generate its turnover. The table below outlines the estimated market potential of the proposed development

**Table 12. Market Potential, 2011**

2011 - First full year of trading			
		Average Sales	
Proposed Centre	GLA (m2)	(\$m)	(\$/m2)
Supermarket	2,585	\$24.94	\$9,647
Convenience (non-super)	4,001	\$29.18	\$7,294
Bulky Goods/Trade	18,268	\$82.21	\$4,500
<b>Total Centre</b>	<b>24,854</b>	<b>\$136.33</b>	<b>\$5,485</b>

Source: MacroPlan Australia (2008).

The proposed centre is expected to generate approximately \$136 million in retail expenditure of which \$82.2 million will be from the bulky goods/trade component. The average turnover for bulky goods retail in a sub-regional centre is approximately \$4,000 to \$5,000 per m2. The expected turnover of the bulky goods component in the proposed centre is thus calculated at \$4,500 / m2.

### 6.2 Market Shares without Proposal

The table below shows the levels of sales in 2011 as would be achieved by existing retail centres without the proposed supermarket component of the development. The analysis reveals the assumed existing trading environment in Clemton Park and surrounding suburbs net of the Parkview Sydney Developments proposal.

The floorspace estimates for each store have been derived from the Property Council of Australia Shopping Centre Directory NSW/ACT 2007, and where these figures were not available, using MacroPlan's best estimates based upon approximate sizes of relevant retailers within centres across NSW. MacroPlan have estimated there to be approximately 20,000m2 of bulky goods and trade retail along Canterbury Road for the purposes measuring the impacts.



Table 13. Market Share Analysis without Proposal, 2011

2011 - Without Proposal	Centre Details		Main Trade Area (MTA)		Beyond Trade (BTA)	
Centre Name	Floorspace (m2)	Turnover (\$m)	% MTA Spend	\$ MTA Spend	% BTA Spend	\$ BTA Spend
Harvey Norman - Wiley Park	10,000	\$45.6	4%	\$25.1	45%	\$20.5
Harvey Norman - Punchbowl	10,000	\$45.6	4%	\$25.1	45%	\$20.5
Home Central	17,863	\$80.4	3%	\$16.3	80%	\$65.2
Homemaker City	18,574	\$84.8	3%	\$17.0	80%	\$67.8
Canterbury Road - Various	20,000	\$90.9	7%	\$45.5	50%	\$45.5
Bunnings - Rockdale	10,000	\$45.6	2%	\$13.7	70%	\$32.0
Bunnings - Leichhardt	10,000	\$45.6	1%	\$6.8	85%	\$38.8
Bing Lee - Hurstville Plaza	2,000	\$9.1	0%	\$2.7	70%	\$6.4
Bing Lee - Marrickville	2,000	\$9.1	0%	\$2.7	70%	\$6.4
Bing Lee - Burwood	2,000	\$9.1	0%	\$2.7	70%	\$6.4
Good Guys - Rockdale	2,000	\$9.1	0%	\$2.7	70%	\$6.4
Other / Escape			74%	\$464.5		

Source: MacroPlan Australia (2008).

The key points from the table above include:

- The bulky goods retail along Canterbury Road would attract the largest share of the MTA expenditure, with an estimated 7% share, with both Harvey Norman centres expected to take approximately 4% share each.
- These two Harvey Norman's draw a significant proportion (approximately 45%) of their trade from within the defined MTA, as does Canterbury Road (60%).
- Many of the centres only draw a minority of their trade from the MTA. This is in part due to the MTA being defined by the location of these centres and that bulky goods retailing attracts a larger percentage of BTA draw. Their positioning on major roads and their relative scarcity when compared with supermarkets is a factor in this. As a result, the impacts on centres under analysis are expected to be relatively negligible.

## 6.3 Market Shares with Proposal

The table below outlines the estimated market shares of the existing retail centres with the development of the old Sunbeam site in 2011 in accordance with the assumed turnover figure as identified in previous sections.



Table 14. Market Share Analysis with Proposal , 2011

2011 - With Proposal	Centre Details		Main Trade Area (MTA)		Beyond Trade (BTA)	
Centre Name	Floorspace (m2)	Turnover (\$m)	% MTA Spend	\$ MTA Spend	% BTA Spend	\$ BTA Spend
<b>Proposed Development</b>	18,268	\$82.2	15%	\$61.7	25%	\$20.6
<b>Harvey Norman - Wiley Park</b>	10,000	\$42.3	4%	\$22.8	46%	\$19.5
<b>Harvey Norman - Punchbowl</b>	10,000	\$42.3	4%	\$22.8	46%	\$19.5
<b>Home Central</b>	17,863	\$79.6	2%	\$15.2	81%	\$64.4
<b>Homemaker City</b>	18,574	\$82.6	3%	\$15.8	81%	\$66.9
<b>Canterbury Road - Various</b>	20,000	\$78.1	6%	\$36.9	53%	\$41.2
<b>Bunnings - Rockdale</b>	10,000	\$44.2	2%	\$12.8	71%	\$31.4
<b>Bunnings - Leichhardt</b>	10,000	\$44.9	1%	\$6.4	86%	\$38.4
<b>Bing Lee - Hurstville Plaza</b>	2,000	\$8.8	0%	\$2.6	71%	\$6.3
<b>Bing Lee - Marrickville</b>	2,000	\$8.8	0%	\$2.6	71%	\$6.3
<b>Bing Lee - Burwood</b>	2,000	\$8.8	0%	\$2.6	71%	\$6.3
<b>Good Guys - Rockdale</b>	2,000	\$8.8	0%	\$2.6	71%	\$6.3
<b>Other / Escape</b>			67%	\$415.5		

Source: MacroPlan Australia (2008).

## 6.4 Economic Impacts

### 6.4.1 Direct Economic Impacts

This section provides an analysis of the potential economic impacts that the proposed development will have on the existing and future operating performance of existing competing supermarkets. The analysis demonstrates economic impact in both dollar terms and the percentage of total sales at these centres.

Economic impacts are derived from the following assumptions:

- The proposed development is assumed for its first full year of trading in 2011. The impact assessment therefore considers the impact on other centres in 2011.
- Population in the MTA increases from 323,906 to 330,160 over the period 2008 to 2011.
- Bulky Goods expenditure in the MTA increases from \$1.895 billion to \$1.912 million over the period from 2008 to 2011.
- Total growth is expressed in real terms, that is, inflation is excluded.
- The proposed development will increase the bulky goods floorspace in the Clemton Park (Canterbury) area by 18,268 m2 which will achieve an estimated net turnover of \$82.2 million.

The economic impacts on existing centres, as detailed in the table below, are described in terms of both reduced turnovers at these centres and as a percentage of total sales from 2009 to 2011. It is noted that the proposed development will have impacts on other retailers not defined in the table however it is assumed that this impact is spread far and wide across a number of retailers.





Table 15. Economic Impact Outcomes for Bulky Goods Centres, 2011

Centre Name	Size (sq.m)	Without Development		With Development		Impact (\$m)	Impact (%)
		Sales (2009)	Sales (2011)	Sales (2011)			
Harvey Norman - Wiley Park	10,000	\$45.0	\$45.6	\$42.6		-\$3.04	-6.7%
Harvey Norman - Punchbowl	10,000	\$45.0	\$45.6	\$42.6		-\$3.04	-6.7%
Home Central	17,863	\$80.4	\$81.5	\$79.6		-\$1.93	-2.4%
Homemaker City	18,574	\$83.6	\$84.8	\$82.8		-\$2.01	-2.4%
Canterbury Road - Various	20,000	\$90.0	\$90.9	\$79.0		-\$11.96	-13.1%
Bunnings - Rockdale	10,000	\$45.0	\$45.6	\$44.3		-\$1.36	-3.0%
Bunnings - Leichhardt	10,000	\$45.0	\$45.6	\$44.9		-\$0.74	-1.6%
Bing Lee - Hurstville Plaza	2,000	\$9.0	\$9.1	\$8.9		-\$0.27	-3.0%
Bing Lee - Marrickville	2,000	\$9.0	\$9.1	\$8.9		-\$0.27	-3.0%
Bing Lee - Burwood	2,000	\$9.0	\$9.1	\$8.9		-\$0.27	-3.0%
Good Guys - Rockdale	2,000	\$9.0	\$9.1	\$8.9		-\$0.27	-3.0%
Other / Escape						N/A	N/A

Source: MacroPlan Australia (2008).

The bulky goods catchment stretches further than for the supermarket catchment with turnover effects measured upon bulky goods retailers at about 7km away.

The turnover effects upon competing centres were all below 15%, with the most significant impacts experienced by the following centres:

- -13.1%: Canterbury Road
- -6.7%: Harvey Norman – Wiley Park
- -6.7%: Harvey Norman – Punchbowl

Overall, the mixed use development will not cause significant adverse turnover effects upon existing retailers assuming a first year of full trading in 2011. While the most significant effects are experienced upon the retailing along Canterbury Road, these effects could in fact be mitigated as the proposed development may enliven the Canterbury Road 'enterprise corridor' if more shoppers use Canterbury Road. Also, if the correct product mix is provided at the proposed development these impacts will be further lessened. The bulky goods, trade retail and showrooms located along Canterbury Road will continue to take advantage of opportunistic trade that prime road frontage provides.



## 7 Planning Assessment

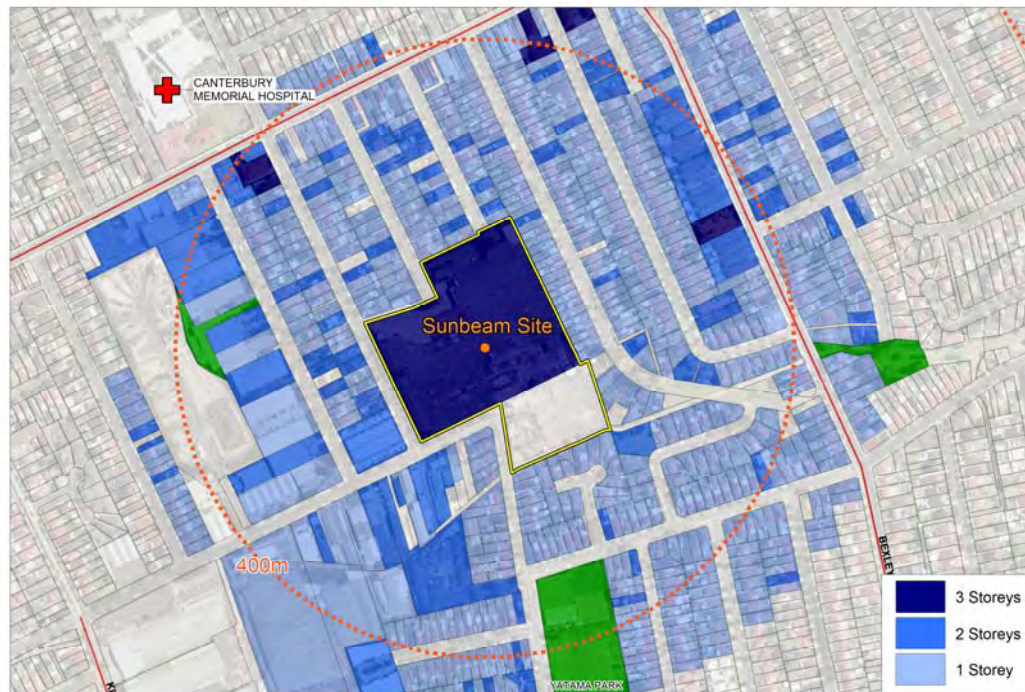
### 7.1 Locality Assessment

#### 7.1.1 Locality Assessment

The locality is largely comprised of detached, single-storey residential dwelling development on lots ranging in size from roughly 400m<sup>2</sup> to 600m<sup>2</sup>. Dwelling stock generally dates back to the 1920's – 1950's era. There is little, if any, new development mixed in with older housing stock and wherever it has occurred is predominately 2-storey attached housing such as dual occupancies.

The figure below illustrates the building heights of surrounding development.

**Figure 4.** Clemton Park Building Height (400 metre radius)



Source: MacroPlan (2008)

Carriageways are wide and houses are generally well setback from the street frontage.

Immediately south and toward the west of the site are located established employment lands areas. These are relatively recent building stock which features light manufacturing uses and some urban services uses. The middle of these blocks are characterised by parking areas and storage yards.

The figure below shows the existing land use pattern of development within the locality.



Figure 5. Clemton Park Land Use Survey (400 metre radius)



Source: MacroPlan (2008)

The street layout is generally consistent with surrounding precincts which feature a grid style network of smaller streets linking neighbourhood connectors with larger district connectors. The street layout and city block layout runs north-south directly connecting with Canterbury Road – a major district connector. Harp Street links the subject site to Kingsgrove Road to the south-west while Alfred Street links the site south to William Street.

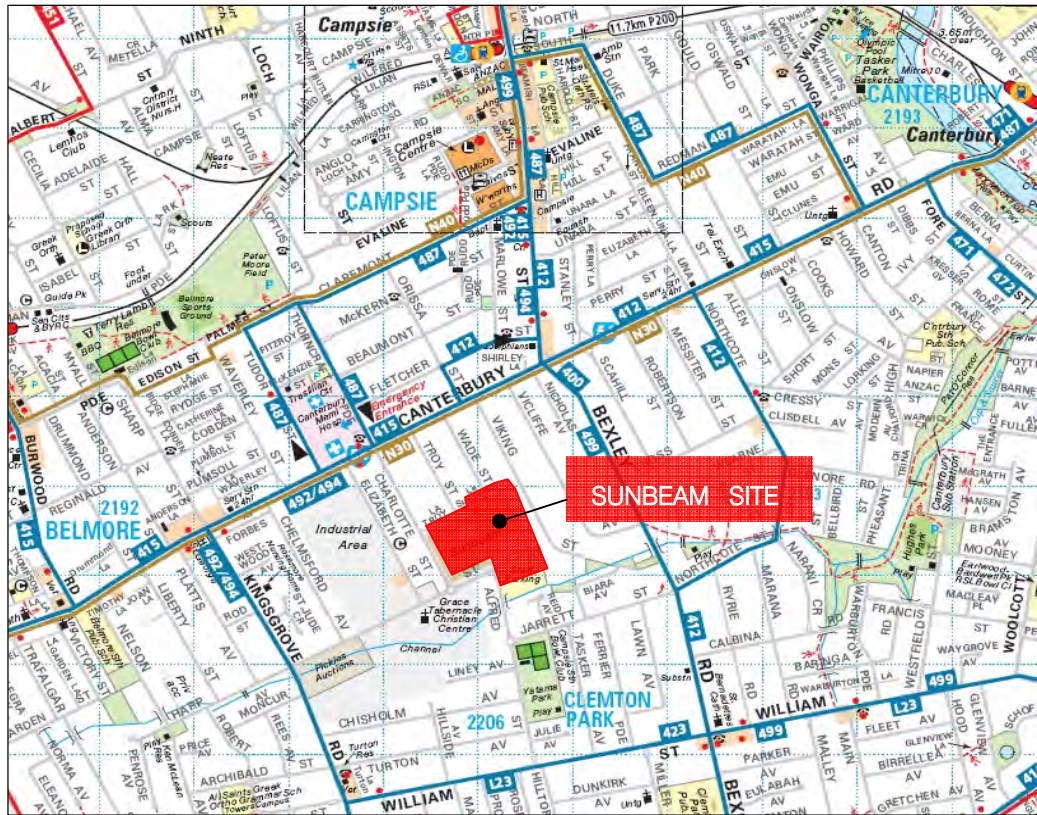
Canterbury Road is located approximately 275 metres north of the subject site. This main artery links the Clemton Park to the City, 11 kilometres east. The land slopes gently from the subject up to Canterbury Road while continuing to fall away south of the site.

The figure below shows the network of bus corridors which operate within the vicinity of the subject site.





Figure 6. Clemton Park Public Transport



Source: City of Canterbury Public Transport Guide (2006)

Directly north along Charlotte Street approximately 350 metres is the Canterbury Hospital which provides a range of medical health care services.

Access to the M5 Motorway is approximately 1.7 kilometres south-west of the subject site via Kingsgrove Road. The M5 Motorway is part of the broader metropolitan Motorway network which connects the M7, M4 and M2 Motorways. The M5 itself provides ready access to Kingsford-Smith Airport at Mascot to the east and Liverpool, a Regional City to the west.

Approximately 230 metres south of the subject site is the Yatama Park and bowling greens and club house which provide walkable access to open space assets.

The figure below illustrates the strategic context of the site within the locality.



Figure 7. Clemton Park Strategic Context



Source: MacroPlan (2008)

### 7.1.2 Recent Development Applications

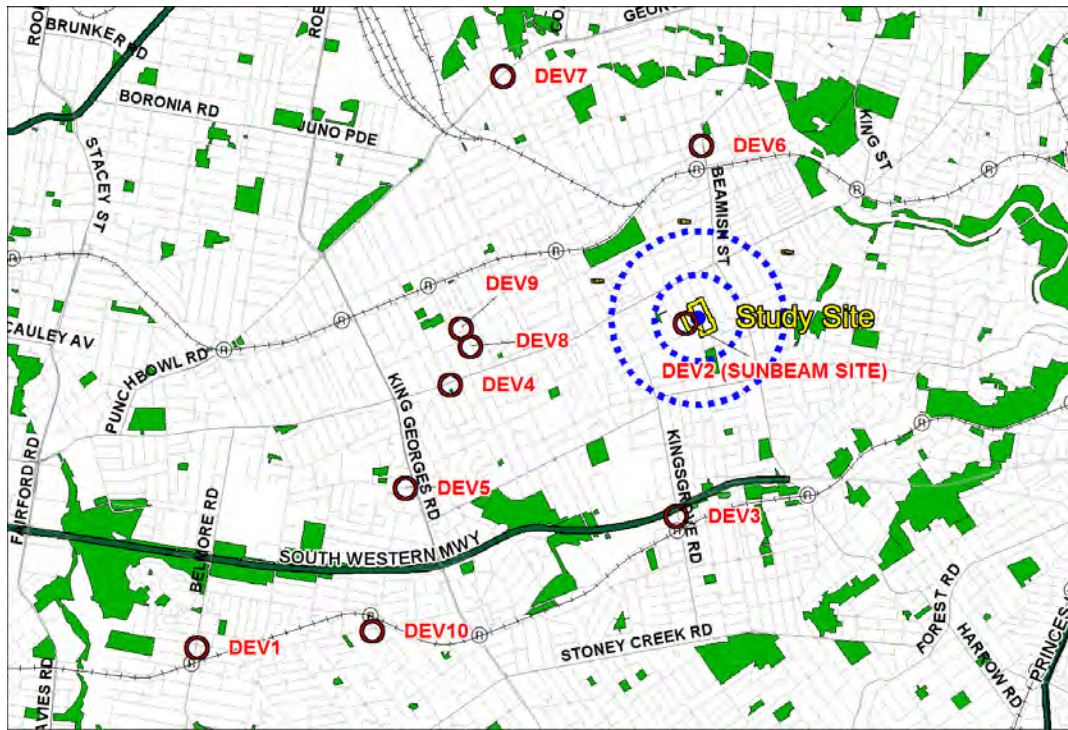
A number of recent development applications and proposals have been compared in order to determine whether at present there are other opportunities similar to that being proposed at the Sunbeam site. The comparison can be found in the table on the following page.

As can be observed from the table below, there are no developments which cater for the type of retail uses proposed under the current concept for the Sunbeam site. Furthermore, the figure below illustrates that these sites are not within close proximity to the Sunbeam site and will not directly affect the site.





Figure 8. Recent Development Applications Spatial Context



Source: MacroPlan (2008) and BCI Australia (2008)

For a detailed list of these Development Applications see Appendix A.

## 7.2 Strategic Planning Framework

### 7.2.1 Metropolitan Strategy

In 2005, the NSW Government released the *Metropolitan Strategy – Cities of Cities* (the Metro Strategy), which was intended to serve as a broad framework to secure Sydney's place in the global economy by promoting and managing growth. It outlines a vision for Sydney over the next 25 years to assist planning in attempting to address urban growth issues relating to employment, housing, centres and corridors, transport, parks and open space, environment and resources and governance.

The Metropolitan Strategy set housing and job targets for each of the Subregions of Metropolitan Sydney. The South Subregion, which includes The City of Canterbury LGA, was set a housing target of 35,000 new dwellings and an employment capacity target of 21,000 new jobs by 2031.



Figure 9. 2031 Planning Targets

SUBREGION	LOCAL GOVERNMENT AREA	NEW DWELLINGS	EMPLOYMENT CAPACITY TARGET
Sydney City	Sydney City	55,000	58,000 New Jobs
Inner North	Lane Cove, North Sydney, Ryde, Willoughby, Hunters Hill, Mosman	30,000	54,000 New Jobs
Inner West	Ashfield, Burwood, Canada Bay, Leichhardt, Strathfield	30,000	10,000 New Jobs
South	Kogarah, Hurstville, Canterbury, Rockdale, Sutherland, Marrickville	35,000	21,000 New Jobs
East	Botany Bay, Randwick, Waverley, Woollahra	20,000	17,500 New Jobs
North East	Pittwater, Warringah, Manly	17,300**	16,000 New Jobs
North	Hornsby, Ku-ring-gai	21,000**	8,000 New Jobs
North West	Baulkham Hills, Blacktown, Blue Mountains, Hawkesbury, Penrith	60,000 existing areas	99,000 New Jobs
		60,000***NW growth centre	
		20,000 other greenfield	
West Central	Auburn, Bankstown, Fairfield, Holroyd, Parramatta	95,500	35,000 New Jobs
South West	Wollondilly, Camden, Campbelltown, Liverpool	40,000 existing areas	80,000 New Jobs
		100,000 SW growth centre	
		15,000 other greenfield	
Central Coast	Gosford, Wyong	35,000 existing areas	55,000 New Jobs
		21,000 greenfield areas	

Source: Metropolitan Strategy – City of Cities (NSW Department of Planning, 2005)

A number of key actions are identified to provide local and state government with strategic direction on how to plan for the Sydney's future growth in order to maintain Sydney's economic role and quality of life for its residents. In order to deliver these broad metropolitan-wide actions at a more local level, the Strategy promoted the implementation of the Metro Strategy through the preparation of a series of Subregional Strategies.

Clemton Park is located with the South Subregion and is therefore subject to the strategic directions provided by the *Draft South Subregional Strategy*.

## 7.2.2 Draft South Subregional Strategy

The *Draft South Subregional Strategy* (SRS), which was placed on public exhibition in December 2007, contains a number of more subregion specific actions which aim to deliver the overall objectives of the Metropolitan Strategy.



## Centres Typology

The Draft South Subregional Strategy identifies a Centres typology which identifies Clemton Park as a small village. A small village is characterised as having a radius of 400 metres and has a small strip of shops and an adjacent residential area containing between 800 and 2,700 dwellings within a 5 or 10 minute walking distance. A present, Clemton Park does not necessarily fit well within this typology. Strip shopping is available along Canterbury Road but this is mainly in the form of urban services type uses such as automotive repair shops and other uses. There are limited day-to-day retail services within a walkable 400 metre catchment.

## Housing and Employment Capacity Targets

The draft strategy sets the South Subregion a target of 35,000 new dwellings and an employment capacity target of 29,000 new jobs by 2031. Of these targets, the Canterbury LGA has a specific housing target of 7,100 new dwellings and an employment capacity target of 500 new jobs over the same period.

## Employment Lands Category

The South Subregional Strategy also developed criteria for consideration in identifying the strategic importance of employment lands. These included attributes such as proximity and access to infrastructure, public transport, large unfragmented sites, buffer from residential areas and their potential to complement and support identified strategic centres.

These criteria were then used to identify the strategic importance of employment lands by three (3) categories which are as follows:

- Category 1 – Land to be retained for industrial purposes;
- Category 2 – Land with potential to allow for a wider range of employment uses; and
- Category 3 – Land that could be investigated for alternative uses.

The following map is an extract from the draft SRS. This map identifies the former Sunbeam site as being category 1 strategic land i.e. land to be retain for industrial purposes. In respect to the subject site, the SRS states the following:

*“There has previously been pressure for the former Sunbeam site to be rezoned to residential uses. However, this site forms part of a larger cluster of industrial zoned land”.*

## Assessment

This assessment would appear to ignore that there are alternative employment opportunities which could assist in creating diverse employment sector opportunities within the area.

It is suggested in the draft SRS that the status quo should remain solely on the premise that the subject site forms part of a larger employment area. This assessment fails to consider the broader arguments for categorisations as discussed in the draft SRS such as:

- proximity and access to infrastructure,
- public transport,
- buffer from residential areas; and,
- potential to complement and support identified strategic centres.





A more rigorous assessment would reveal that the subject site is detached from the broader employment lands precinct to the west and partially buffered by a residential area which presents amenity issues for residents.

Also, there are larger employment lands precincts at Kingsgrove and Kingsgrove North which are located only 1.2 kilometres south-west of the subject site. Furthermore, the M5 Motorway transects the Kingsgrove precincts making these precincts more desirable in terms of freight and logistics uses. Kingsgrove Railway Station is also a key public transport asset which provides sustainable transport opportunities for workers in the Kingsgrove area. For these reasons, it is considered that Clemton Park and more specifically, the subject site should not be considered 'Category1' employment lands given the proximity of the Kingsgrove precincts.

Although ample bus services are provided, particularly along Canterbury Road, customers of bulky goods retail businesses generally rely on some level of automobile transport to collect goods purchased and therefore are less likely to rely on public transport. Therefore, the lack of walkable access to heavy rail infrastructure is not likely to diminish opportunities for broader employment uses such as bulky goods / retail at the subject site.

The subject site's strategic location in proximity to heavy rail, strategic bus corridors and major road networks mean that bulky goods / retail uses would be ideal for the subject site. For these reasons, it is considered that the draft SRS could be amended to identify the subject site as 'Category 2' which would allow a broader range of employment based uses such as bulky goods / retail and further commercial and residential uses.

Figure 10. Employment Lands in Sydney's South (Northern Areas)



Source: Draft South Subregional Strategy (NSW Department of Planning, 2007)



## 7.3

## Statutory Planning Framework

### 7.3.1 State Environmental Planning Policies

#### *Draft SEPP No. 66 – Integration of Land Use and Transport*

This Policy aims to ensure that urban structure, building forms, land use locations, development designs, subdivision and street layouts help achieve the following planning objectives:

- a) improving accessibility to housing, employment and services by walking, cycling, and public transport,
- b) improving the choice of transport and reducing dependence solely on cars for travel purposes,
- c) moderating growth in the demand for travel and the distances travelled, especially by car,
- d) supporting the efficient and viable operation of public transport services,
- e) providing for the efficient movement of freight.

Development of the subject site for bulky goods / retail is generally consistent with the objectives of this policy. The provision of a possible 1,000 jobs and residential dwellings within 275 metres of Canterbury Road, a major artery with frequent bus services and Belmore, Kingsgrove and Campsie railways stations all less than 2 kilometres in distance will ensure that future employees and customers will have access to public transport, employment and local services. Further, it is acknowledged that bulky goods do generate traffic. For this reason they should be well located in regards to road and transport. Also, the subject site is close to the M5 Motorway and close to Canterbury Road.

### 7.3.2 Canterbury Planning Scheme Ordinance

#### *Zoning*

The principle planning instrument which applies to the subject site is the Canterbury Planning Scheme Ordinance (CPSO) which was gazetted in August 1970.

Under this instrument, the subject site is zoned **Light Industrial 4(b)**. Under this zone, the following land uses are prohibited:

- Boarding houses;
- caravan parks;
- child care centres;
- commercial premises (other than auction rooms, premises used for the purposes of rag collecting and dealing; or recreation facilities);
- dwellings and dwelling-houses (other than dwellings and dwelling-houses used in conjunction with development for a purpose permitted in this zone);
- educational establishments;
- hospitals;
- hotels;
- institutions;
- industries other than light industries;
- junk yards;
- liquid fuel depots;
- mines;



- motels;
- multiple unit housing;
- shops other than those referred to in Schedule 3;
- shops referred to in Schedule 3 having a Canterbury Road frontage;
- stock and sale yards;
- roadside stalls;
- town houses; and
- villa homes.

#### *Floor Space Ratio (FSR)*

Under clause 44(4A) of the CPSO, the maximum floor space ratio for land within Zone No. 4(b) Light Industrial as shown on the map marked "Canterbury Local Environmental Plan No. 105" is:

- a) in the case of development involving the erection of a building where there is no industrial component - **1:1**; or
- b) in any other case - **1.5:1**.

If a non-industrial development were approved on the subject site, under the floor space ratio control a maximum theoretical yield of approximately 55,000 square metres of floor space would be permissible depending on other site specific variables.

## 7.4

### Summary

The Draft South Subregional Strategy identifies the land as 'Category 1' employment land which should be protected from competing uses. However, this assessment is only based on the subject site's proximity to nearby industrial lands precincts. MacroPlan considers that there are significant benefits of the proposal in terms of employment opportunities which would create a diversity of employment opportunities by employment sector.

The recommendations of the draft SRS should be reassessed in light of these opportunities and a more rigorous review of employment lands undertaken.

The locality assessment shows that the subject site has excellent proximity to public transport infrastructure such as railway stations and local and strategic bus services. The subject site is also less than 275 metres from Canterbury Road and less than two (2) kilometres to the M5 Motorway which ensures that the subject site is easily accessible and ideal for bulky goods / retail uses.

In terms of built form, the surrounding locality is largely free standing residential dwellings on typical sized allotments of considerable age. The street pattern and carriageway widths indicate that there is good potential for future upgrades.

A review of other development applications and proposals for similar development within the LGA has identified that there is no development of similar scale or potential net benefit for the community as can be provided via redevelopment of the former Sunbeam site.



## 8

# Conclusions

This impact assessment of the proposed mixed use development at 60 Charlotte Street, Clemton Park has been undertaken as follows:

- Estimating the turnover impacts upon competing retail within relevant trade area catchments (including Canterbury Road Enterprise Corridor), assessed according to:
  - Impacts upon competing supermarkets
  - Impacts upon bulky goods retailers
- Assessing the mixed use development's integration with surrounding land uses

The turnover impacts across both supermarket and bulky goods retailers within the trade area catchments are below industry standard accepted levels of significance of approximately 15%.

For competing supermarkets within an approximate 5km radius, the turnover effects were all below 10%, with the greatest impacts experienced by the following centres:

- -4.6%: Woolworths - Campsie
- -4.6%: Food for Less - Campsie Centre
- -3.7%: Flemings – Bexley North
- -3.7%: Coles - Earlwood

The bulky goods catchment stretches further than for the supermarket catchment with turnover effects measured upon bulky goods retailers within a 7km radius. The retailers included the centre based multi-tenant outlets, stand alone Bunnings, Harvey Norman, Bing Lee and The Good Guys as well as the bulky goods along Canterbury Road.

The turnover effects upon competing centres were all below 15%, with the most significant impacts experienced by the following centres:

- -13.1%: Canterbury Road
- -6.7%: Harvey Norman – Wiley Park
- -6.7%: Harvey Norman – Punchbowl

Overall, the mixed use development will not cause significant adverse turnover effects upon existing retailers assuming a first year of full trading in 2011. In fact, the presence of a centre that will draw traffic down Canterbury Road will perhaps enliven the retail located along this road.

The collocation of the supermarket and bulky goods precinct, as well as other associated commercial and retail activities will also encourage multi-purpose trips and other community benefit such as:

- Increases in employment in the form of direct centre employment, indirect centre employment, direct construction employment and indirect construction employment
- Increased range of retail goods and services.



- Increased competition for supermarket spend
- Trade area expenditure retention.
- Contribution to council rates.
- Employment generating use of site that has been vacant for over 5 years.

The development will integrate effectively with the adjacent residential dwellings, whose residents will be able to take advantage of the walkable options provided by the retail, commercial, community and medical facilities to be provided by the site. The site location will provide a central community focal point.

Further, the development could provide approximately 1,415 jobs as well as several hundred dwellings, which would contribute significantly to the South subregion's dwelling target and job targets as prescribed by the NSW Department of Planning in the South Subregional Strategy. These jobs will be located near a significant workforce as well as near quality public transport provided by Canterbury Road.

The mixed use development actively enhances the community through its diversity of product and land use integration while the turnover impacts upon competing retailers, including Canterbury Road, fall below standard industry levels of significance. MacroPlan believe this mixed use development to be suitable for the Canterbury community and adheres to sound planning and economic principles.



## Appendix A – Recent Development Applications

Table 16. Recent Development Applications

	SHOPS / OFFICES   UNITS (11) - 4 storey	RESIDENTIAL   COMMERCIAL   SENIORS LIVING (CLEMTON PARK VILLAGE)	APARTMENTS (13)   SHOPS   SUPERMARKET - 5 storey	APARTMENTS (26)   COMMERCIAL - 4 storey	SHOPS   BOWLING ALLEY   CINEMA COMPLEX   RESTAURANT - extension (ROSELANDS SHOPPING)	APARTMENTS (18)   OFFICES (5)   SHOPS (2) - 7 storey	UNITS (8)   SHOPS   OFFICES - 4 storey	UNITS (24)   COMMERCIAL - 4 storey	SHOPS / OFFICES (4)   APARTMENTS (12)-2 storey	APARTMENTS (5)   SHOP - alterations & additions - 3 storey
	DEV1	DEV2	DEV3	DEV4	DEV5	DEV6	DEV7	DEV8	DEV9	DEV10
<b>Address</b>	260 Belmore Rd Lot 1 DP 214539 Riverwood NSW 2210	60 Charlotte St Clemton Park NSW 2206	219-231 Kingsgrove Rd Lot 1 DP 534643 Kingsgrove NSW 2208	952-956 Canterbury Rd 2 Canarys Rd Roselands NSW 2196	24 Roselands Dr Roselands NSW 2196	124-128 Beamish St Campsie NSW 2194	342 Punchbowl Rd Belfield NSW 2191	196-202 Haldon St Lakemba NSW 2195	188 Haldon St Lakemba NSW 2195	56 Broadarrow Rd Lot 7 DP 10112 Narwee NSW 2209
<b>Value</b>	2.115 million approximate.	300 million approximate.	5 million approximate.	AUS\$ 6.20 million Estimated	AUS\$ 50.00 million Estimated	5 million approximate.	2.5 million estimated.	AUS\$ 4.50 million Estimated	1.7 million approximate.	0.58 million approximate.
<b>Stage</b>	Design	Concept	Design	Concept	Concept	Design	Design	Design	Design	Design
<b>Status</b>	Development Application	Feasibility	Development Application	Abandoned	Deferred	Development Application	Deferred	Abandoned	Development Application	Development Application
<b>Const start</b>	0	0	0	0	0	0	0	0	0	0
<b>Const end</b>	0	0	0	0	0	0	0	0	0	0
<b>Time stamp</b>	03 Dec 2007 14:29	21 Aug 2008 11:52	28 Jul 2008 10:38	04 Feb 2008 17:21	22 Apr 2008 16:51	28 May 2007 12:29	27 Mar 2007 16:22	14 Mar 2007 14:19	22 Apr 2008 15:43	11 Feb 2008 15:25
<b>Town</b>	Riverwood	Clemton Park	Kingsgrove	Roselands	Roselands	Campsie	Belfield	Lakemba	Lakemba	Narwee
<b>Council</b>	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury	Canterbury
<b>State</b>	NSW	NSW	NSW	NSW	NSW	NSW	NSW	NSW	NSW	NSW
<b>Site Area</b>	0.771 hectares	5.5 hectares	0.17 hectares	2593 hectares	11.25 hectares	0	0.093 hectares	0	0	0.06 hectares
<b>Storeys</b>	5	0	6	5	0	9	6	4	3	3
<b>Category</b>	Offices & Commercial / Retail & Catering / Residential - Multi Density / Infrastructure	Residential - Multi Density / Offices & Commercial / Infrastructure / Retail &	Residential - Multi Density / Retail & Catering	Residential - Multi Density / Offices & Commercial	Retail & Catering / Sport & Leisure / Entertainment & Cultural / Infrastructure	Residential - Multi Density / Offices & Commercial / Retail & Catering	Residential - Multi Density / Retail & Catering / Offices & Commercial / Infrastructure	Residential - Multi Density / Offices & Commercial	Residential - Multi Density / Retail & Catering	Residential - Multi Density / Retail & Catering
<b>Subcategory</b>	Offices / Shops, Shopping Centres, Supermarkets, Arcades / Units, Apartments, Flats, Townhouses / Roads & Other Surfaces - Runways, Car Parks, Roundabouts	Units, Apartments, Flats, Townhouses / Offices / Landscaping / Shops, Shopping Centres, Supermarkets, Arcades / Child Care Centres, Kindergartens	Units, Apartments, Flats, Townhouses / Shops, Shopping Centres, Supermarkets, Arcades	Units, Apartments, Flats, Townhouses / Commercial Complex	Shops, Shopping Centres, Supermarkets, Arcades / Restaurants, Canteens, Cafe Food Outlets, Licensed Bars / Squash Courts, Bowling Alley, Gymnasium / Theatres, Cinemas / Roads & Other Surfaces - Runways, Car Parks, Roundabouts / Landscaping	Units, Apartments, Flats, Townhouses / Offices / Shops, Shopping Centres, Supermarkets, Arcades	Units, Apartments, Flats, Townhouses / Shops, Shopping Centres, Supermarkets, Arcades / Offices / Roads & Other Surfaces - Runways, Car Parks, Roundabouts	Units, Apartments, Flats, Townhouses / Offices	Units, Apartments, Flats, Townhouses / Shops, Shopping Centres, Supermarkets, Arcades	Units, Apartments, Flats, Townhouses / Shops, Shopping Centres, Supermarkets, Arcades
<b>Ownership type</b>	Private	Private	Private	Private	Private	Private	Private	Private	Private	Private
<b>Development type</b>	New	New	New	New	Extension	New	New	New	New	Alteration addition
<b>Status</b>	Status: DEVELOPMENT APPLICATION SUBMITTED   METHOD OF APPOINTING BUILDER YET TO BE DETERMINED	Status: PRELIMINARY ASSESSMENT (CONCEPT PLAN) SUBMITTED TO DEPARTMENT OF PLANNING UNDER PART 3A MAJOR PROJECTS   PRELIMINARY ENVIRONMENTAL ASSESSMENT SUBMITTED FOR PRECINCTS A & B	Status: DEVELOPMENT APPLICATION REFUSED   APPEAL LODGED WITH LAND & ENVIRONMENT COURT   HEARING DATE YET TO BE DETERMINED	Status: PROJECT ABANDONED	Status: PROJECT DEFERRED INDEFINITELY   ARCHITECT & ACOUSTIC ENGINEER NO LONGER INVOLVED	Status: DEVELOPMENT APPLICATION SUBMITTED   TENDERS WILL BE INVITED FROM SELECTED BUILDERS UPON DETERMINATION OF DEVELOPMENT APPLICATION (Status Checked 02/06/2008 No Change)	Status: DEVELOPMENT APPROVAL GRANTED   PROJECT DEFERRED INDEFINITELY	Status: PROJECT ABANDONED	Status: DEVELOPMENT APPLICATION SUBMITTED   METHOD OF APPOINTING BUILDER YET TO BE DETERMINED	Status: DEVELOPMENT APPLICATION SUBMITTED   METHOD OF APPOINTING BUILDER YET TO BE DETERMINED   ADDITIONAL CONSULTANT LISTED (Status Checked 08/04/2008 No Change)

