

Burrah Park Neighbourhood Centre Assessment

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Introduction

Urbis has been engaged by HBB Property to complete a high-level Neighbourhood Centre Assessment as part of their State Significant Development Application (SSDA) for the Burrah Park Masterplan.

The Burrah Park Masterplan is a proposed industrial warehouse and logistics estate located within the Northern Gateway Precinct of the Western Sydney Aerotropolis.

This assessment has been completed to address comments that have been received from the NSW Department of Planning, Housing and Infrastructure (NSW DPHI) as part of the SSDA process. These comments relate to the proposed Burrah Park Neighbourhood Centre, which is planned to include 2,000 sq.m of gross lettable area (GLA).

These comments requested further justification on:

- The proposed 2,000 sq.m neighbourhood centre within the Burrah Park Masterplan being sufficient in size to adequately service the estimated 3,237 direct jobs generated by the proposed masterplan, and those generated from adjoining development to the east.
- The difference in total land area of the proposed neighbourhood centre with the site identified in the WSA Precinct Plan.
- The scale and mix of uses proposed within the neighbourhood centre aligns with the requirements of Section 5.1 of the Western Sydney Aerotropolis Precinct Plan as of July 2025 (WSA Precinct Plan).

Burrah Park Neighbourhood Centre



Note: While architect plans note local centre, the centre being proposed is intended to be a neighbourhood centre

Source: Nettletontribe

Worker Forecast

The main issue that has been raised for the proposed Burrah Park Neighbourhood Centre is whether its proposed 2,000 sq.m scale is sufficient to support the 3,237 on-site workers and any workers to the site adjoining the eastern boundary of the Burrah Park Masterplan once it is fully developed.

The adjoining land to the east of the Burrah Park Masterplan, bounded by the M12 corridor to its east, does not currently have publicly available plans for development. We have therefore estimated the number of jobs that will feature on this site once it is fully developed.

To estimate this, we have firstly assumed that the site will take a logistics use, in line with its zoning as per the WSA Precinct Plan.

The WSA Precinct Plan indicates that any zoned land developed for logistics should achieve job densities of 18 – 25 jobs per hectare of zoned land. Applying an adopted 25 jobs per hectare assumption to the adjacent site zoned land area of ~30 hectares equates to 750 jobs.

When considering these jobs in addition to the 3,237 Burrah Park Masterplan jobs, the Burrah Park Neighbourhood Centre is anticipated to support 3,987 workers.

Adjacent Eastern Site Jobs Calculation

	Value
Zoned Land Area (ha)	~30
Job Density Assumption (jobs per ha)	25
Jobs (Adjacent Eastern Site)	750

Source: DPHI; Urbis

Worker Forecast at Completion

	Jobs
On-Site Jobs	3,237
Adjacent Eastern Site Jobs	750
Total On-Site and Adjacent Eastern Site Jobs	3,987

Source: DPHI; Urbis

Retail Spending Market Forecast and Demand Analysis

Worker spend has been forecast to calculate the total potential retail spend and supportable floorspace at the Burrah Park Neighbourhood Centre.

Annual worker retail spending for the on-site workers has been calculated using CommBank IQ data and ABS Census 2021 data. The spending categories that have been applied are those aligned to neighbourhood centres servicing workers, including food catering, leisure, general, and retail services.

The estimated annual spend per worker (\$1,289) has been multiplied by the 3,987 estimated workers to calculate total market spend. This equates to \$5.14 million in real \$2025 terms. This analysis takes a high case assumption and assumes 100% of spending will be retained in the Burrah Park Masterplan. However, workers may choose to spend elsewhere including at other centres in the Western Sydney Aerotropolis (once developed) or other retailers on their way to and from work.

To determine a benchmark average trading level (ATL), we have looked at the rents per sq.m of four comparable food and beverage tenancies within industrial areas. Adopting an Eastern Creek tenancy as the most comparable, we applied an occupancy cost ratio (OCR) of 12% to reach an indicative ATL of \$5,200.

Applying this ATL to total spend, retail floorspace demand (GLA) is forecast to reach ~990 sq.m. This demand will be more than well-provided for by the 2,000 sq.m proposed for the Burrah Park Neighbourhood Centre, and the ~1,500 sq.m we have assumed will be delivered as retail.

This analysis indicates that the proposed scale of the Burrah Park Neighbourhood Centre provides a sufficient level of floorspace to support the retail needs of its on-site workers, in addition to those in the adjacent site to the east.

Retail Floorspace Demand Forecast (\$2025)

	Value
Average Annual Retail Spend Per Worker	\$1,289
Number of Workers	3,987
Annual Worker Retail Spend (\$M)	\$5.14
Average Trading Level (\$ per sq.m)	\$5,200
Retail GLA Demand	989 sq.m
Burrah Park Neighbourhood Centre Retail GLA	~1,500 sq.m*
Difference	+511 sq.m

Note: 1,500 sq.m has been allocated to retail for the purpose of this assessment, noting that the remaining 500 sq.m is assumed to be allocated to non-retail uses (community facilities, meeting areas, childcare, etc.)
Source: CommBank IQ; ABS; Urbis

Proposed Relocation of the Neighbourhood Centre

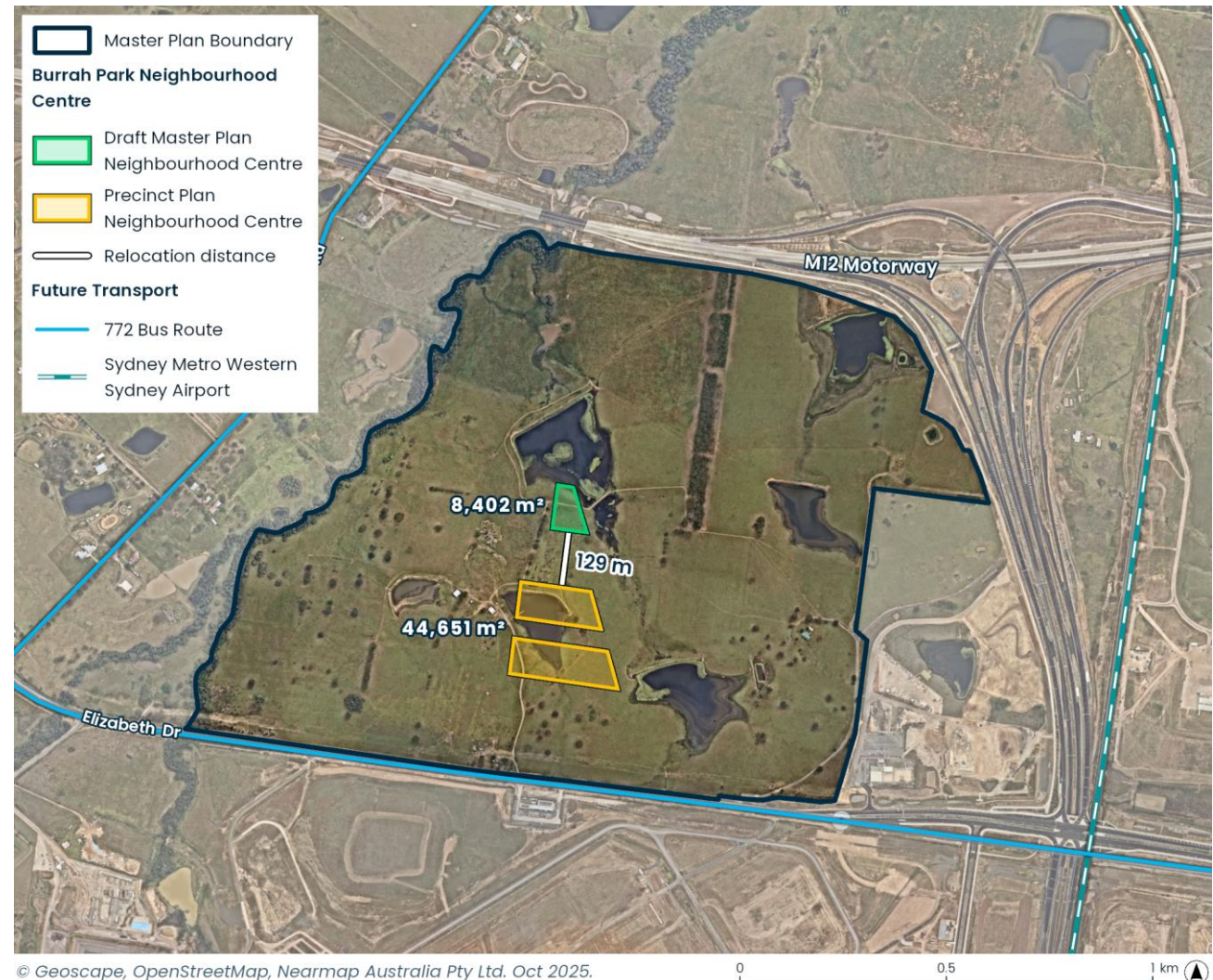
The map opposite compares the location and land area of the Burrah Park Neighbourhood Centre with the location and area proposed in the WSA Precinct Plan.

The proposed relocation is a 129-metre shift to the north. This positions the neighbourhood centre more centrally within the Burrah Park Masterplan. This centrality makes the centre closer to a larger share of workers across the Burrah Park Masterplan, as opposed to being further south in the WSA Precinct Plan.

With our high-level retail assessment indicating that the planned scale of the Burrah Park Neighbourhood Centre is adequate, the proposed 8,400 sq.m land area is sufficient in delivering this use.

The original site that was allocated to deliver the neighbourhood centre in the WSA Precinct Plan covering 44,700 sq.m is therefore too large. The reduction in land area therefore allows for a more efficient use of land, as a higher allocation of land can be allocated towards other employment uses (industrial and logistics).

Neighbourhood Centre Relocation Context



Alignment to Western Sydney Aerotropolis Precinct Plan

The WSA Precinct Plan outlines the intended role and function of the hierarchy of centres that have been defined for the Aerotropolis. The table below demonstrates the strong alignment of the proposed Burrah Park Neighbourhood Centre to the objectives of a neighbourhood centre as per the WSA Precinct Plan.

Burrah Park Neighbourhood Centre Alignment to WSA Precinct Plan Neighbourhood Centre Objectives

	WSA Precinct Plan Objectives	Burrah Park Neighbourhood Centre Alignment
Role and Intent	Provide daily convenience goods and range of neighbourhood scale services to support workers and residents.	The Northern Gateway precinct is intended to be an easily accessible employment precinct, with supporting residential uses in some locations. Residential uses will not fall into the proposed centre's catchment. Our assessment has indicated that the proposed scale of retail in the Burrah Park Neighbourhood Centre is adequate in providing convenience retail to the on-site and adjacent east workers.
Typical Uses	Some retail floorspace (not a supermarket, or significant specialised retail); multiple retail premises (not just a petrol station or one standalone store); activity or business hub; community facilities. Does not include residential uses.	The Burrah Park Neighbourhood Centre will primarily consist of cafes and other food retail stores, along with other retail services. Around ~500 sq.m will be allocated to business hub/community facilities. No residential uses will be delivered within the Burrah Park Neighbourhood Centre.
Transport Connectivity	High level of pedestrian accessibility from surrounding development, provision of bus access, drop off points.	The Burrah Park Neighbourhood Centre is located centrally within the Burrah Park Masterplan, making its accessible for on-site workers. This location is an improvement from the WSA Precinct Plan location in terms of having better access to workers in the northern end of the precinct.
Critical Locational Criteria	Located adjacent to areas of open space. Located on a frequent bus route. Location must consider the barrier impacts of major roads and different sizes.	The centre is proposed to be located next to an open space zone (including recreation space and a playground), with walkable street access. The proposed 772 and 709 bus routes will travel along Elizabeth Drive, which bounds the southern border of the Burrah Park Masterplan, supporting worker commutes. However, as the centre will largely support on-site workers, the distance from bus stops will not impede centre access as usage will be self-contained.



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