

GREATER MACARTHUR AND WILTON

RETAIL MARKET ANALYSIS

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PREPARED FOR NSW DEPARTMENT OF PLANNING & ENVIRONMENT

URBIS

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Appendix A Residual Supermarket Centres

EXECUTIVE SUMMARY

This assessment of demand for retail floorspace potential at Wilton and the Greater Macarthur Priority Growth Area (GMPGA) identifies potential for a network of centres including:

- A sub-regional shopping centre at Wilton providing around 52,600 sq.m GLA in total.
- A second sub-regional shopping centre at West Appin providing around 32,600 sq.m GLA in total.
- A supermarket based shopping centre at Menangle Park providing around 15,000 sq.m GLA overall.
- Capacity for supermarket-based centres anchored by large format supermarkets (4,000 sq.m) at Mount Gilead and Bingara Gorge.
- Potential for four additional supermarket-based shopping centres located throughout the release areas. We expect that these would include smaller supermarkets meeting the weekly and top up needs of a local catchment.
- Scope for around 27,000 sq.m bulky goods floorspace which could be developed across several locations.

The staging and delivery of new centres will be tied to the timing of dwelling completions and population growth within the development precincts in the study area.

Residential development across the GMPGA is expected to deliver around 52,500 new dwellings for some 155,000 additional residents. Residential development at Menangle Park, Mount Gilead and Wilton will be completed well ahead of before the completion of residential development at West Appin.

Future residents will require access to a broad range of retailing and services in order to meet their household needs. A network of centres providing a broad mix of uses will be essential to successful precinct planning and place making.

The proposed network of centres has the potential to generate around 6,500 direct jobs. This would include a mix of full time, part time and temporary employment providing opportunities for a broad cross section of the future population.

Table A1 provides a summary of the recommended composition of centres across the network. Indicative locations of each centre are shown in Map A1. The locations of centres are provided for indicative purposes and will be subject to further analysis. In order to be viable, retail centres need to be located in areas that are highly visible and accessible.

The floorspace figures provided in this assessment should be viewed as a base case. Annual growth in per capita spending has the potential to increase the overall size of the spending market. Additional retail expenditure has the potential to support more floorspace, or alternatively to increase productivity levels across retailers.

The final configuration of individual centres may be subject to change. As an example, if housing completions are delayed at West Appin, it may be that DDS operator demand could result in a larger centre at Mount Gilead in the interim. This could ultimately reduce the scale of eventual development at West Appin, so that it becomes a supermarket-based centre rather than a sub-regional centre. Fundamentally, this would significantly not affect the total quantum of retail floorspace that can be supported across all centres in the study area.

Chart A.1 provides a comparison of the proposed scale of centres at Wilton, Menangle Park and West Appin relative to existing shopping centres across Metropolitan Sydney. It demonstrates that:

- The scale of a future centre at Wilton would be comparable with the existing Rouse Hill Town Centre
- The proposed centre at West Appin would be 20% smaller than the existing Narellan Town Centre
- Menangle Park would be comparable in size to a suburban supermarket based centre such as Carnes Hill Marketplace and Stanhope Village
- Other supermarket-based centres within the network would, in the main, be comparable to a contemporary centre such as The Ponds.

Centre Network Capacity

Greater Macarthur Priority Growth Area

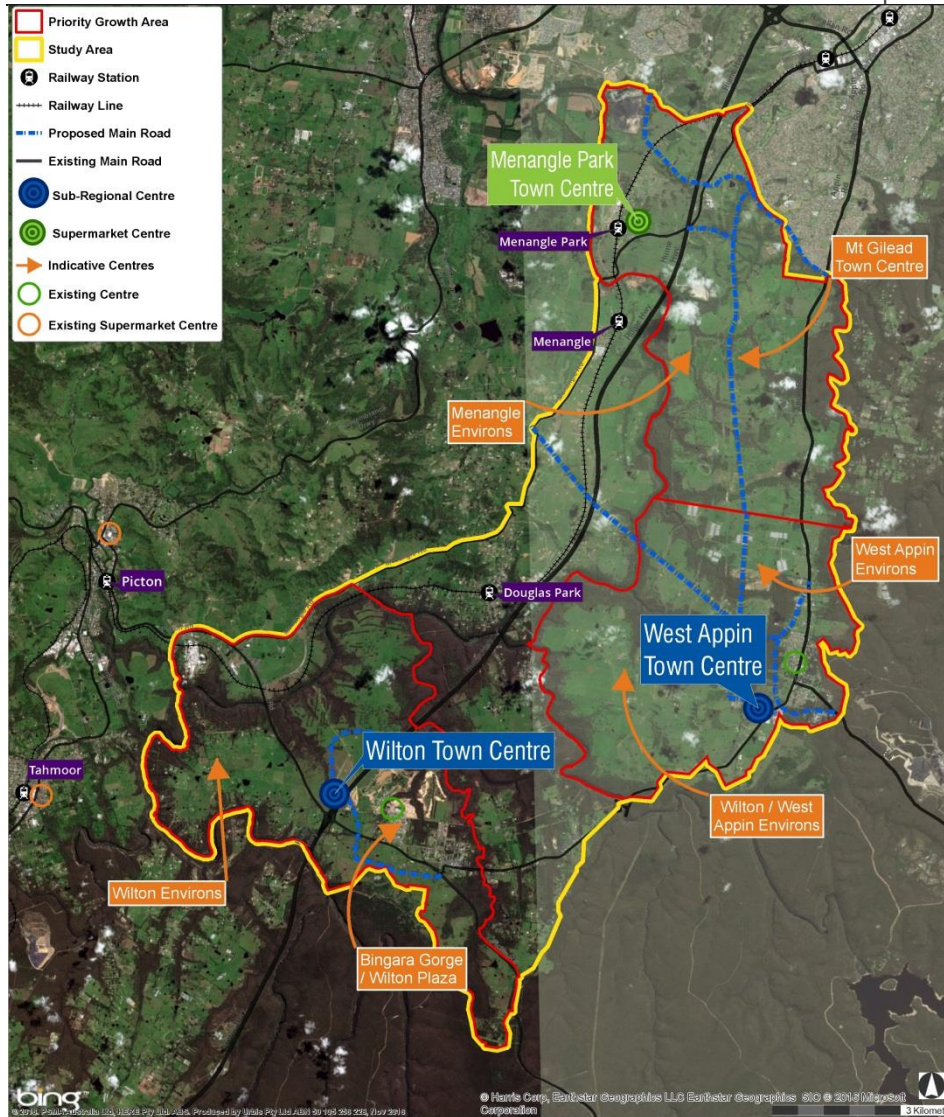
Table A.1

			Anchor Tenants (No.)	Total Floorspace (sq.m)
Major Centres	Type	Anchors		
Wilton Town Centre	Sub-Regional	DDS	2	52,600
		Full Line Supermarket	2	
		Smaller Supermarket	1	
Menangle Park Town Centre	Supermarket	Full Line Supermarket	2	15,100
West Appin Town Centre	Sub-Regional	DDS	1	32,600
		Full Line Supermarket	2	
		Smaller Supermarket	1	
Other Centres				
Mt Gilead Town Centre	Supermarket	Full Line Supermarket	1	8,700
Centre A (Bingara Gorge / Wilton Plaza)*	Supermarket	Full Line Supermarket	1	8,700
Centre B (Wilton Environs)	Supermarket	Full Line Supermarket	1	6,100
Centre C (Wilton / West Appin Environs)	Supermarket	Full Line Supermarket	1	6,100
Centre D (Menangle Park Environs)	Supermarket	Smaller Supermarket	1	4,400
Centre E (West Appin Environs)	Supermarket	Full Line Supermarket	1	6,100
Total DDS			3	66,200
Total Supermarket			14	74,200
Total Centre			17	140,400
Bulky Goods	Standalone Precinct(s)			27,400
Total Floorspace				167,800

*Additional Floorspace

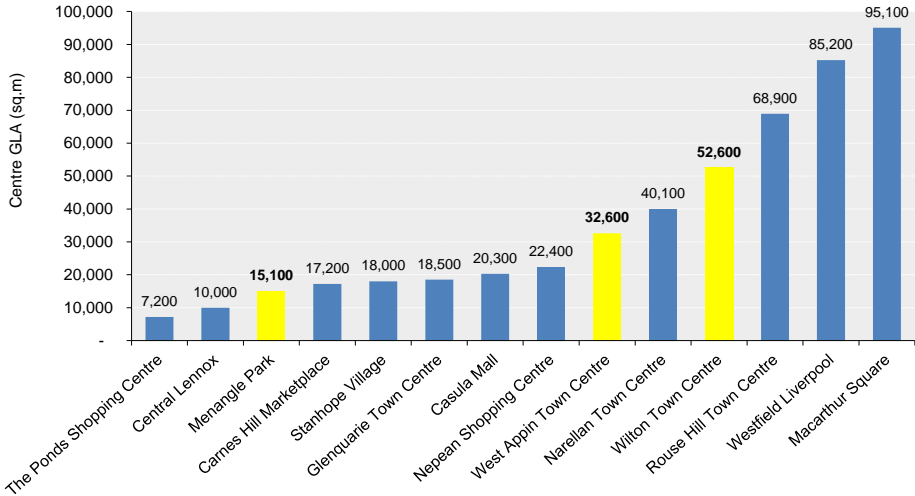
Indicative Centre Network

Map A.1



Centre Size Comparison

Metropolitan Sydney Chart A.1



Source : PCA Shopping Centres Online 2016 ; Urbis

INTRODUCTION

1.1. SCOPE OF WORK

Urbis was appointed by NSW Department of Planning and Environment (DPE) to assess retail floorspace potential at Wilton town centre and other centres within the Greater Macarthur Priority Growth Area (GMPGA).

The scope of work involved the following tasks:

- Define trade areas for proposed higher order centres at Wilton, Menangle Park and West Appin
- Assess the potential scale of retail and ancillary floorspace that can be supported at each of these centres. This analysis has been prepared based on the following:
 - The size of the future retail spending market within each defined trade area sector
 - Sustainable market shares that anchor tenants (supermarkets and discount department stores) could be expected to achieve within each trade area sector
 - The amount of specialty retail and ancillary uses that could be supported at each centre having regard to typical centre composition
- Assess potential for additional centres across the study area, having regard to residual available expenditure
- Determine the market for bulky goods retailing within the study area
- Consider the population thresholds that are likely to trigger the staged development of centres
- Identify the employment potential associated with this network of centres.

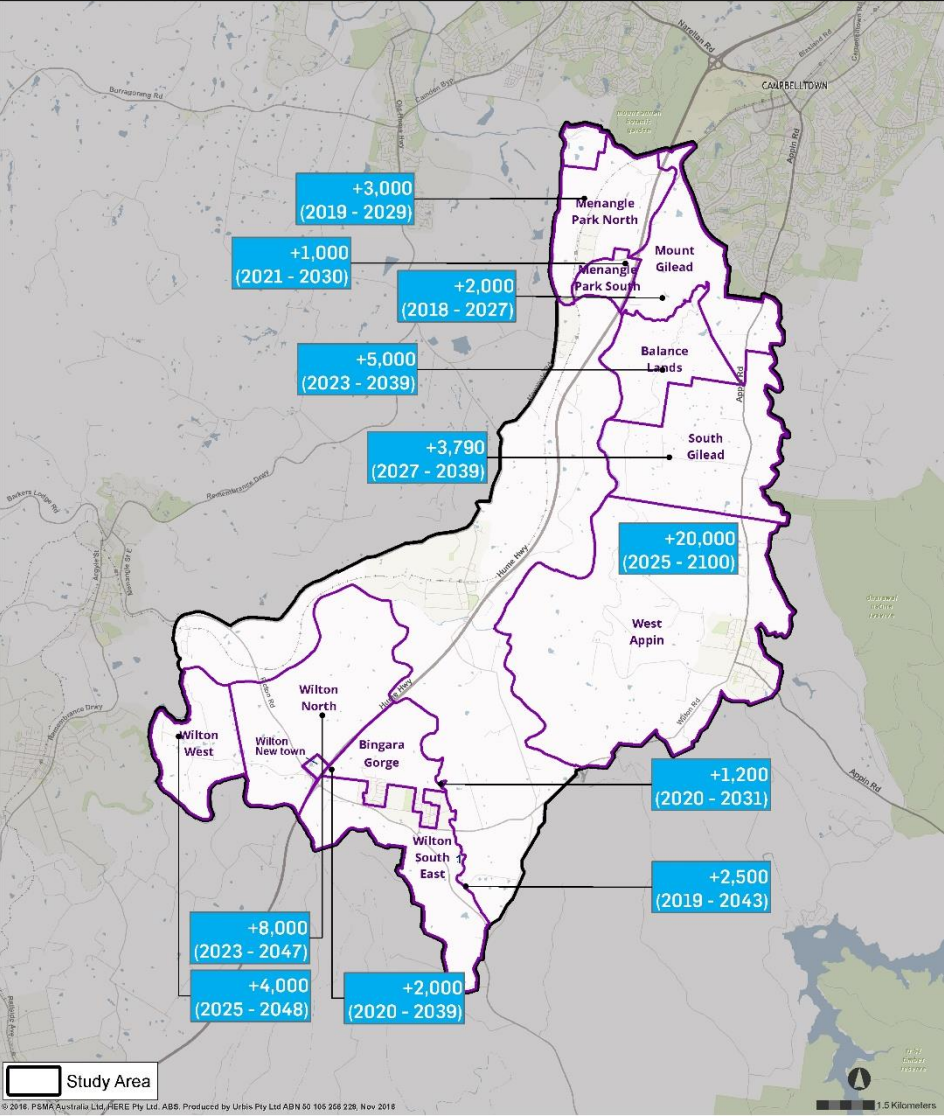
1.2. ASSUMPTIONS

In preparing this analysis the following assumptions have been agreed with NSW DPE:

- The extent of the study area as shown in Map 1.1 on the following page
- Around 52,500 new dwellings to be constructed within the study area as illustrated with indicative timing of development to occurring between 2019 to 2100
- Indicative dwelling take-up rates (provided by DPE) on a precinct basis are illustrated in Maps 1.1 and 1.2 on the following page
- Residential development at Menangle Park, Mount Gilead and Wilton (including Bingara Gorge) will be completed well ahead of the completion of residential development at West Appin
- West Appin will deliver up to 20,000 new dwellings. Assuming an average take-up rate of 300 new dwellings per annum from 2025, West Appin would not be completed until 2100.
- Average household size for new dwellings of 2.8 persons per household
- Per capita retail expenditure for new residents will be in line with the current Wollondilly Shire LGA average
- Wilton, Menangle Park and West Appin are to be established as higher order centres within the broader retail hierarchy
- A network of lower order centres will also be established, notionally as shown in Map 1.3.

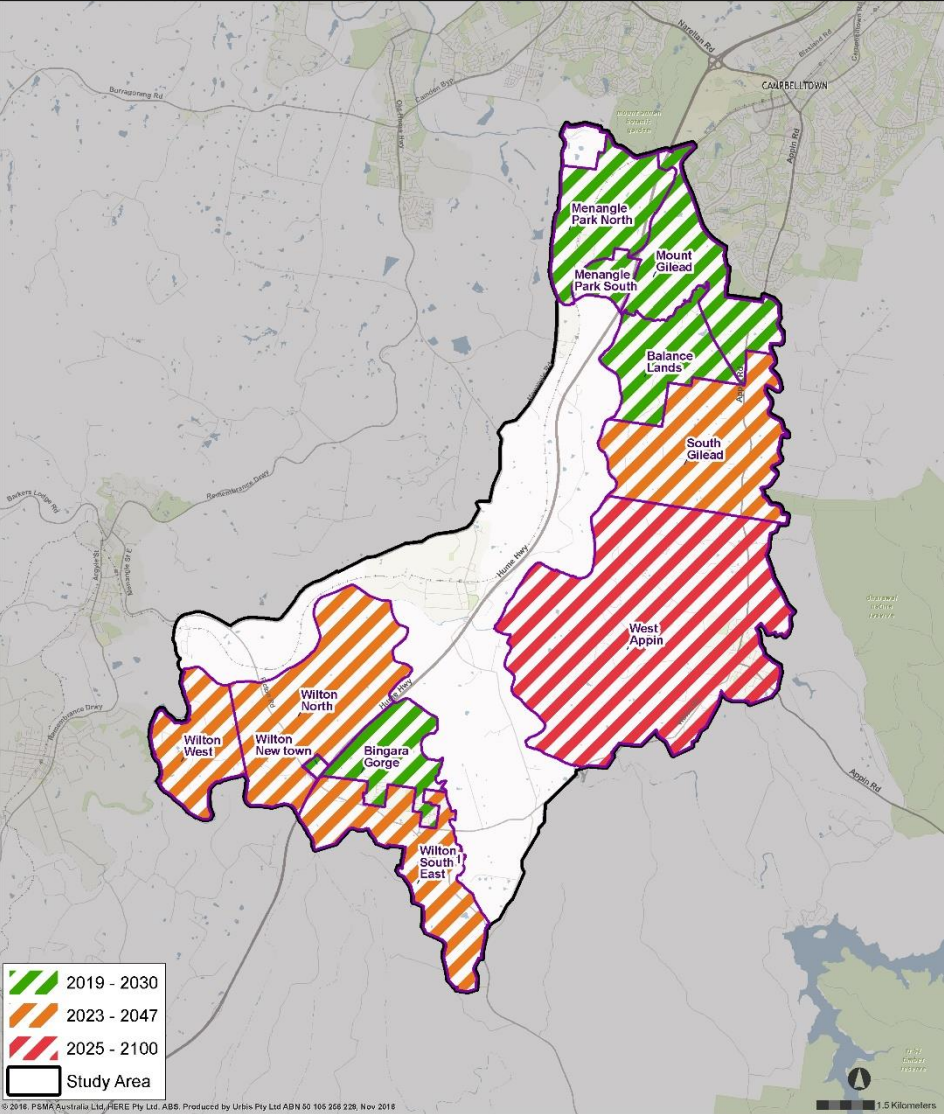
Indicative Dwellings by Precinct

Map 1.2



Indicative Timing of Residential Development by Precinct

Map 1.3



1.3. GREATER MACARTHUR LAND RELEASE INVESTIGATION

The Greater Macarthur Land Release Investigation Preliminary Strategy and Action Plan identifies immediate opportunities to deliver up to 35,000 homes in Menangle Park and Mount Gilead and a new town at Wilton.

Map 1.3 on the following page shows the Greater Macarthur Vision to 2036. This was prepared and exhibited by NSW Department of Planning & Environment (DPE) and includes:

- A proposed 'major centre' at Wilton
- Proposed 'town centres' at Menangle Park and Mount Gilead
- A network of proposed and existing 'village centres' located across the Menangle Park and Mount Gilead and Wilton release areas.

Although not specifically shown on the maps, West Appin has also been included within the proposed growth area boundary to acknowledge its long-term capacity for housing supply. Large scale land release at West Appin is not likely to be required in the short term. However, an accelerated rezoning could occur if demand for homes increases and the private sector makes the necessary supporting infrastructure commitments.

This assessment considers the demand for retail floorspace resulting from the long term development of 20,000 dwellings at West Appin in addition to the other land release precincts.

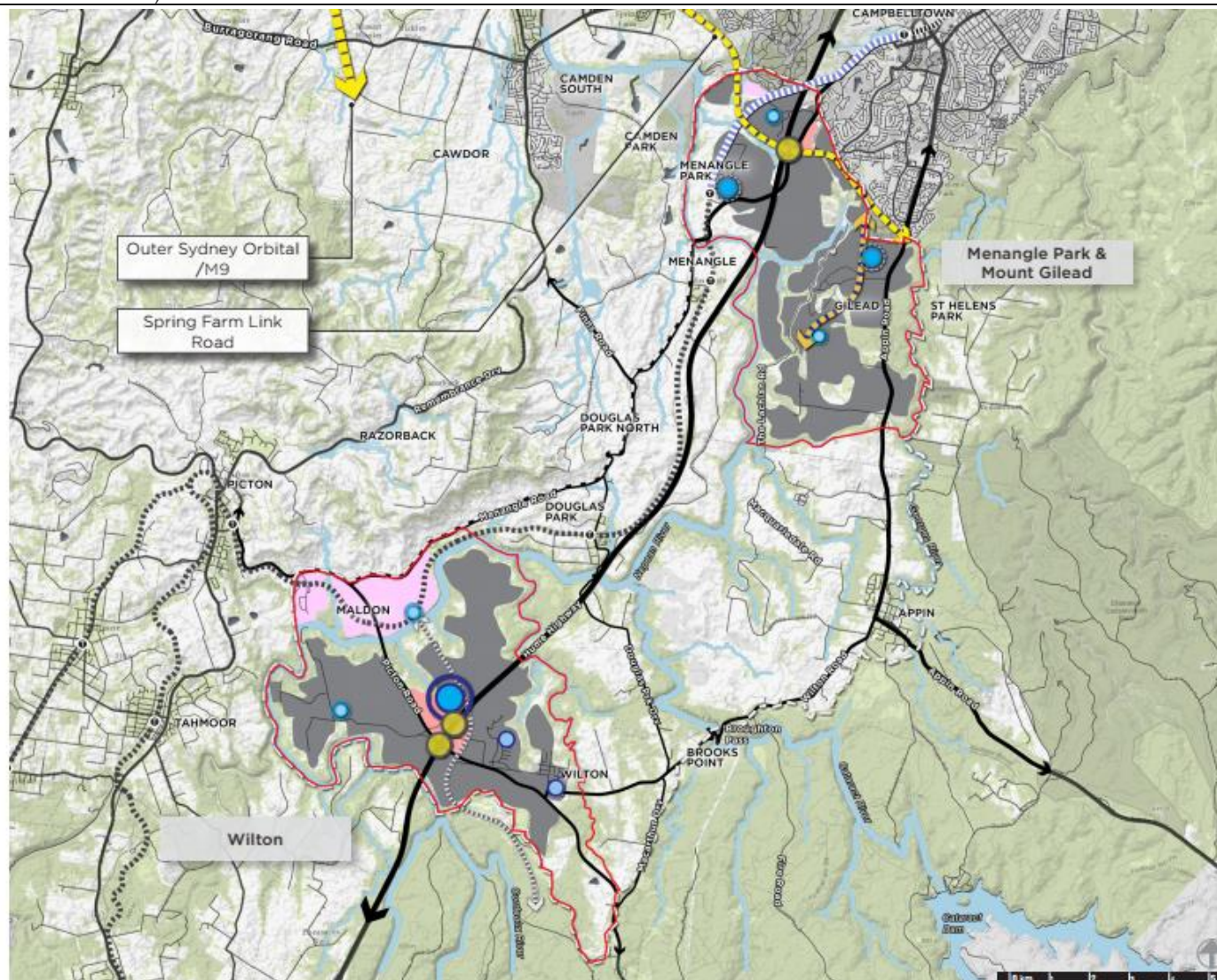


Figure 1 Greater
Macarthur Vision to 2036

2. RETAIL CAPACITY

2.1. CENTRES HEIRACHY

Urbis has tested the market capacity to support a mix of shopping centres based on anticipated population and retail spending growth within the study area and environs.

As shown in Table 2.1, this includes provision for higher order centres at Wilton, Menangle Park and West Appin. The potential for residual spending within the study area to support additional supermarket-based centres across the study area has also been considered.

Centres Hierarchy

Approach and Assumptions

Table 2.1

Centre Type	Anchor	Locations
Sub-Regional	Discount department store(s) Supermarket(s)	Wilton plus West Appin (longer term)
Supermarket-based	Supermarkets(s)	Menangle Park, Mt Gilead, balance of study area

The centre definitions used throughout the report are based on the Urbis Shopping Centre Benchmarks and include the following:

A **sub-regional shopping centre** is built around one or two major discount department stores (DDSs), one or more supermarkets, and includes specialty shops and non retail uses.

Supermarket based centres are usually less than 10,000 sq.m in size and comprise of one or two major supermarkets anchoring a collection specialty shops and services.

2.2. SUMMARY OF FINDINGS

Table 2.2 provides a summary of Urbis' assessment of market capacity to support additional retail centres across the Wilton, Menangle Park and Mount Gilead and West Appin release areas upon completion of all residential development. This is shown graphically in Map 2.1 on the following page. The analysis demonstrates capacity to support:

- A **sub-regional shopping centre at Wilton providing around 52,600 sq.m GLA in total**. This would include two DDSs (14,000 sq.m in total), two full line supermarkets (8,000 sq.m) and a third smaller format supermarket (1,500 sq.m), around 20,000 sq.m of mini major and specialty retail space and around 9,000 sq.m ancillary and non retail space. Wilton would be the largest centre within the region and would draw from a wide trade area
- A second **sub-regional shopping centre at West Appin providing around 32,600 sq.m GLA in total**. This would include one DDSs (7,000 sq.m), two full line supermarkets (8,000 sq.m) and a third smaller format supermarket (1,500 sq.m), around 11,000 sq.m of mini major and specialty retail space and around 5,000 sq.m ancillary and non retail space. This centre would draw the majority of its trade from the West Appin release area. Given the lengthy timescale assumed for completion of residential development in this area, staging of retail development at West Appin is expected to occur over a long period of time
- It is expected that development at Wilton and West Appin would include a mix of shopping centre and street front floorspace
- **Menangle Park** has potential for a town centre development **anchored by two full line supermarkets, providing around 15,000 sq.m GLA overall**. The proximity to existing higher order retailing at Narellan and Campbelltown would impact on the ability to sustain DDS retail at Menangle Park. Retail development in this location could be integrated around the existing train station to maximise exposure to daily commuters. This

configuration could provide a higher proportion of street front retail relative to other centres and more compact supermarkets (still providing a full line offer), potentially with a reduced car parking requirement

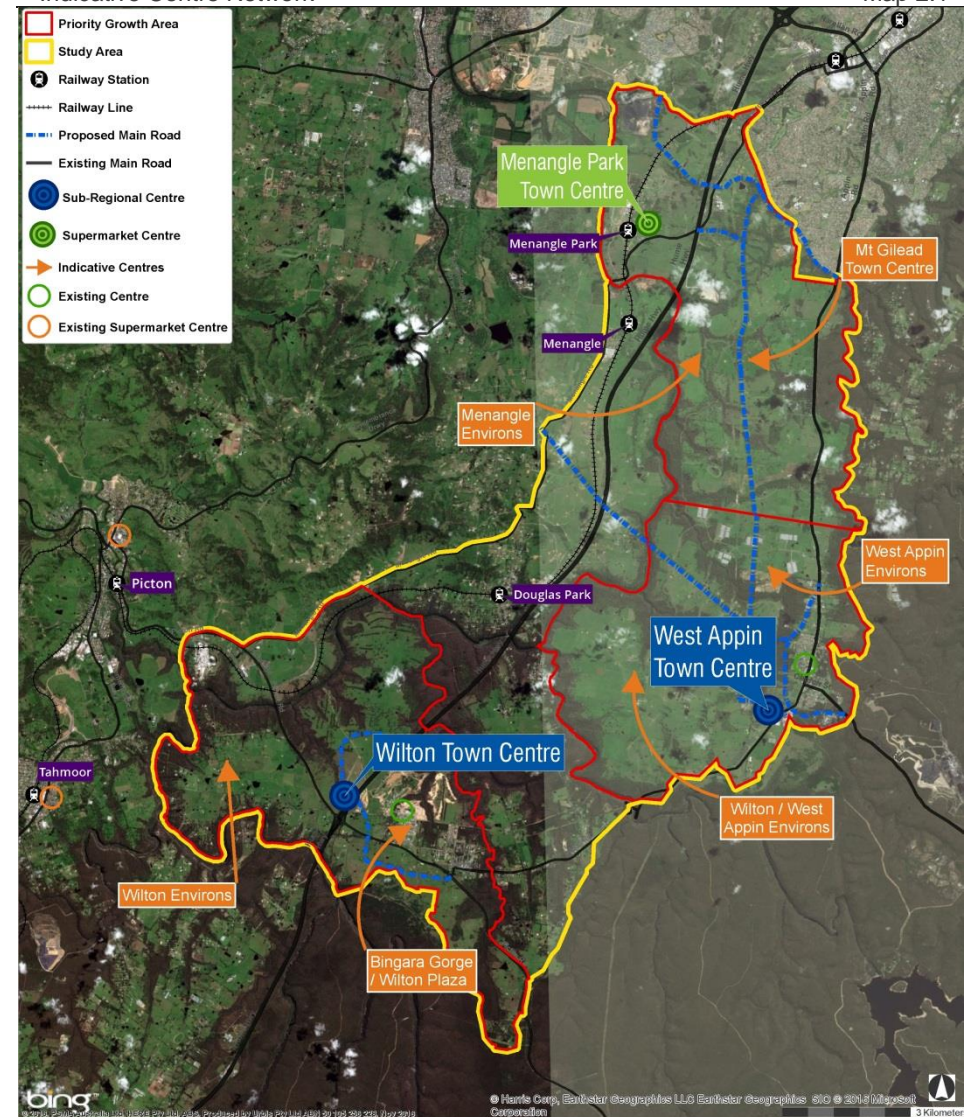
- Capacity for **supermarket-based centres** anchored by large format supermarkets (4,000 sq.m) at **Mount Gilead and Bingara Gorge**. Future retail at Bingara Gorge would add to the existing provision at Wilton Plaza. It is envisaged that these would be centres under single management providing convenient car parking and accessibility for a local catchment
- Potential for **four additional supermarket-based shopping centres** located throughout the release areas. We expect that these would include smaller supermarkets meeting the weekly and top up needs of a local catchment.

2.3. SCALE, LOCATION AND TIMING

- The floorspace figures provided in this assessment should be viewed as a base-case. Annual growth in per capita spending (which has not been factored into our analysis beyond 2019) has the potential to increase the overall size of the spending market. Additional retail expenditure has the potential to support more floorspace, or alternatively to increase productivity levels across retailers.
- The location of centres, as shown on Map 2.3 is provided for indicative purposes and will be subject to further analysis. In order to be viable, retail centres need to be located in areas that are highly visible and accessible.
- The final configuration of centres may be subject to change. As an example, if housing completions are delayed at West Appin, it may be that DDS operator demand could result in a larger centre at Mount Gilead in the interim. This could ultimately reduce the scale of eventual development at West Appin, so that it becomes a supermarket-based centre rather than a sub-regional centre.
- Fundamentally, this would significantly not affect the overall quantum of retail floorspace that can be supported across the study area.

Indicative Centre Network

Map 2.1



Centre Capacity Assessment

Wilton, Menangle Park and Mount Gilead and West Appin

Table 2.2

Major Centres	Type	Anchors	No. of Anchor Tenants	Anchor Floorspace (sq.m)	Mini Major and Specialty Retail Floorspace (sq.m)	Ancillary and Non-Retail Floorspace (sq.m)	Total Floorspace (sq.m)
Wilton Town Centre	Sub-Regional	DDS	2	14,000	20,000	9,100	52,600
		Full Line Supermarket	2	8,000			
		Smaller Supermarket	1	1,500			
Menangle Park Town Centre	Supermarket	Full Line Supermarket	2	6,400	5,900	2,800	15,100
West Appin Town Centre	Sub-Regional	DDS	1	7,000	11,000	5,100	32,600
		Full Line Supermarket	2	8,000			
		Smaller Supermarket	1	1,500			
Other Centres							
Mt Gilead Town Centre	Supermarket	Full Line Supermarket	1	4,000	2,700	2,000	8,700
Centre A (Bingara Gorge / Wilton Plaza)*	Supermarket	Full Line Supermarket	1	4,000	2,700	2,000	8,700
Centre B (Wilton Environs)	Supermarket	Full Line Supermarket	1	2,800	1,900	1,400	6,100
Centre C (Wilton / West Appin Environs)	Supermarket	Full Line Supermarket	1	2,800	1,900	1,400	6,100
Centre D (Menangle Park Environs)	Supermarket	Smaller Supermarket	1	1,500	1,900	1,000	4,400
Centre E (West Appin Environs)	Supermarket	Full Line Supermarket	1	2,800	1,900	1,400	6,100
Total DDS			3	21,000	31,000	14,200	66,200
Total Supermarket			14	43,300	18,900	12,000	74,200
Total Centre			17	64,300	49,900	26,200	140,400
Bulky Goods	Standalone Precinct(s)						27,400
Total Floorspace							167,800

*Additional Floorspace

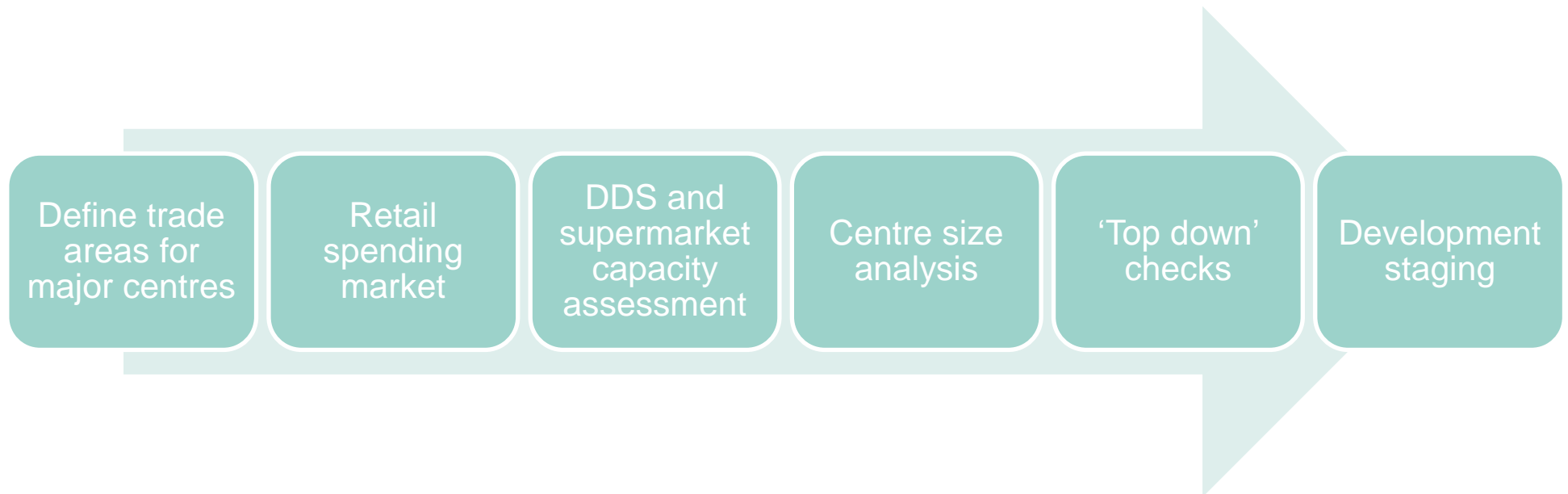
3. METHODOLOGY

The methodology that has been adopted to assess market potential for retail floorspace is illustrated in Map 2.1 and described overleaf.

Methodology

Wilton Town Centre Retail Market Analysis

Chart 3.1



Define Trade Areas for major centres (Wilton, Menangle Park and West Appin)

The trade area refers to the area from which an existing or proposed centre or retailer is most likely to draw custom. The size and scale of trade areas vary due to the geographical context of the retail development in question. Other factors which may influence the definition of a trade area include:

- The strength, range and appeal of the subject centre offer
- The proximity, composition and quality of existing and proposed competing retail facilities. The presence of similar retail centres as well as the general provision of retail space within the area
- The accessibility of the centre including the road and transport network, as well as access to ample parking
- Physical barriers such as freeways, railway lines, rivers/lakes, bushland and drive times.

Retail spending market

The size of the retail spending market is the product of population and per capita retail spending. The key tasks involved include:

- Estimate population by each trade area sector:
 - Current population estimates for each trade area sector were established using Australian Bureau of Statistics 2015 Estimate of Resident Population (ERP) figures at the SA1 statistical level.
 - Trade area sectors were overlayed against the residential precinct boundaries in order to identify the future residential and population growth within each trade area sector
 - Certain trade areas extend beyond the precinct and sub precinct boundaries. In these instances, SA1 data was used to estimate the current population of these areas. SAFI forecasts were then used to grow this population to 2036. No additional population growth was assumed beyond 2036 (this reflects the current limit of the SAFI forecasts as well as the likely capacity of the land and its limits to support additional development beyond this time)
- Assess future per capita retail spending market potential in each trade area sector:
 - Retail spending estimates are derived using *MarketInfo*, a micro-simulation model developed by Market Data Systems Limited (MDS). This model, which is based on information from the national ABS Household Expenditure Survey (HES) and the Census of Population and Housing, uses micro-simulation techniques to combine a household's propensity to spend on particular commodities with the socio-economic characteristics of individuals to derive spending per capita estimates on a small area basis
 - In view of the long term forecasts required for the project, and the fact that growth will be driven mainly by Greenfield development the approach to identifying spending growth was as follows:
 - Identify a suitable 'proxy' baseline spend per capita for the emerging population. The current average retail spend per capita

for the Wollondilly Shire LGA has been adopted and applied to the current and incoming population

- Wollondilly Shire retail spend is slightly below the Sydney average (-2%), which is consistent with the Camden LGA and higher than the Campbelltown LGA (which has a -13% variation from the Sydney average). Relative to these other LGAs Wollondilly has the highest current spend per capita on food retailing, which is 5% above the Sydney average. Given that the future retail mix will need to focus on providing a quality food retail offer to residents this was considered an important factor
- In the Menangle Park trade area, the secondary north and east trade areas extend into established / developing urban areas around Rosemeadow, Glen Alpine and Mount Annan. In these areas the current per capita expenditure rates were used
- In view of the length of the forecasting period (tied to the assumed dwelling completion rates illustrated in Maps 1.1 and 1.2) no per capita spending growth has been applied for the period beyond commencement of residential development. Assuming per capita spending growth over such a long forecast period risked over inflating the potential size of the retail spending market at capacity.
- In this regard, the size of the spending market in this report is a product of population and per capita retail spending during the development commencement year. All figures are provided in constant \$2016 dollars including GST.

DDS and supermarket capacity assessment

The assessment of market potential for DDS and supermarket tenants at Wilton, Menangle Park and West Appin involves a staged assessment which considers:

- The total amount of retail spending in key product groups by trade area residents at capacity (i.e. when all dwellings have been constructed)
- The proportion of retail spend that is typically directed to discount department stores and supermarkets from key product groups (primarily food retail for supermarkets and department store type merchandise –

“DSTM” - to DDS’s. We have assumed a gradual decline in DSTM expenditure to DDS’s to reflect the fact that this category is likely to face increased competition from other retail forms in future

- The amount of spending in these categories that could be expected to be retained within each trade area, having regard to the likely provision of major tenants on completion, including current and future provision
- When considering spending retention, consideration is given to additional centres that could also be accommodated within the study area, and the impact that these would have on spending patterns (i.e. the overall network of centres). This enables a broad market capacity assessment check for major tenants across each trade area
- Indicative market shares for anchor tenants at Wilton, Menangle Park and West Appin centre were then calculated having regard to Urbis benchmarks and the assumed positioning and accessibility of the centre in question relative to each trade area sector. This process assesses the proportion of the trade area retained spend that anchor tenants at these centres can reasonably be expected to capture
- The resultant turnover estimate for the major tenancies at each centre was assessed against benchmark tenancy size productivity rates (\$ per sq.m) for DDS and supermarket retailers in order to test whether the scale of development envisaged is sustainable on a productivity basis

Centre size analysis

The overall retail and ancillary floorspace (by key product category) that could be supported at each centre is assessed having regard to the Urbis Shopping Centre Benchmarks. Specifically, the ratio between major floorspace and other uses is used to derive the total amount of gross leasable area (GLA).

An additional allowance has been made for street front tenancies which could be developed outside of a shopping centre, having regard to what we consider to be a sustainable quantum of floorspace in key retail and non-retail categories. This step was excluded for smaller centres where the predominant form of development is expected to be a single contained centre (such as the recent supermarket based centre at The Ponds, which still manages to provide a mix of indoor and outdoor retailing).

Bulky Goods

A separate assessment of capacity for **bulky goods** retailing was also undertaken, having regard to the size of the bulky goods spending market within the study area, potential expenditure leakage (having regard to established bulky goods precincts) and sustainable productivity rates for retailers.

‘Top down’ checks

A series of ‘top down’ checks were adopted to test the market capacity for retail provision:

- Benchmark productivity rates (turnover per sq.m) were assigned to the proposed network of centres, adopting an indicative centre mix that is also in line with current benchmarks. Next an analysis of **spend containment** within the study area was undertaken. This step identifies the amount of spend that would need to be retained by these centres, and conversely the amount of study area resident spend that would be leaked to higher order centres beyond the study area
- Analysis of spend containment at a product category level allows the ‘reasonableness’ of these assumptions to be tested
- Separately, benchmarking of the **market shares** by product category for Wilton, Menangle Park and West Appin across their primary and main trade area sectors, provides a top down check that the scale of each centre can be supported
- **Benchmarking the scale** of the proposed centres within the network against existing shopping centres in comparable context provides a further ‘sense check’ that the scale of proposed development is of a scale that is supportable from a built form perspective

Development staging

The indicative timing of delivery of new retail centres has been considered having regard to population thresholds typically required to sustain major anchor tenants.

In practice, there may be instances where retail operators seek to open early in the development phase, in order to gain first-mover advantage, as well as to provide amenity and services for early residents. This in turn can assist in

increasing the take-up rate of residential development within the land release precincts. In these instances, retailers may be willing to accept lower productivity rates in initial years, with the prospect of strong year on year growth.

Employment generation

The employment that could be sustained by the network of centres has been estimated having regard to benchmark employment densities for the mix of land uses assumed for each centre.

4. MARKET CAPACITY ASSESSMENT

This section outlines the findings of the demand analysis based on an assessment of the market potential within trade areas defined for future centres at Wilton, Menangle Park and West Appin.

The analysis considers:

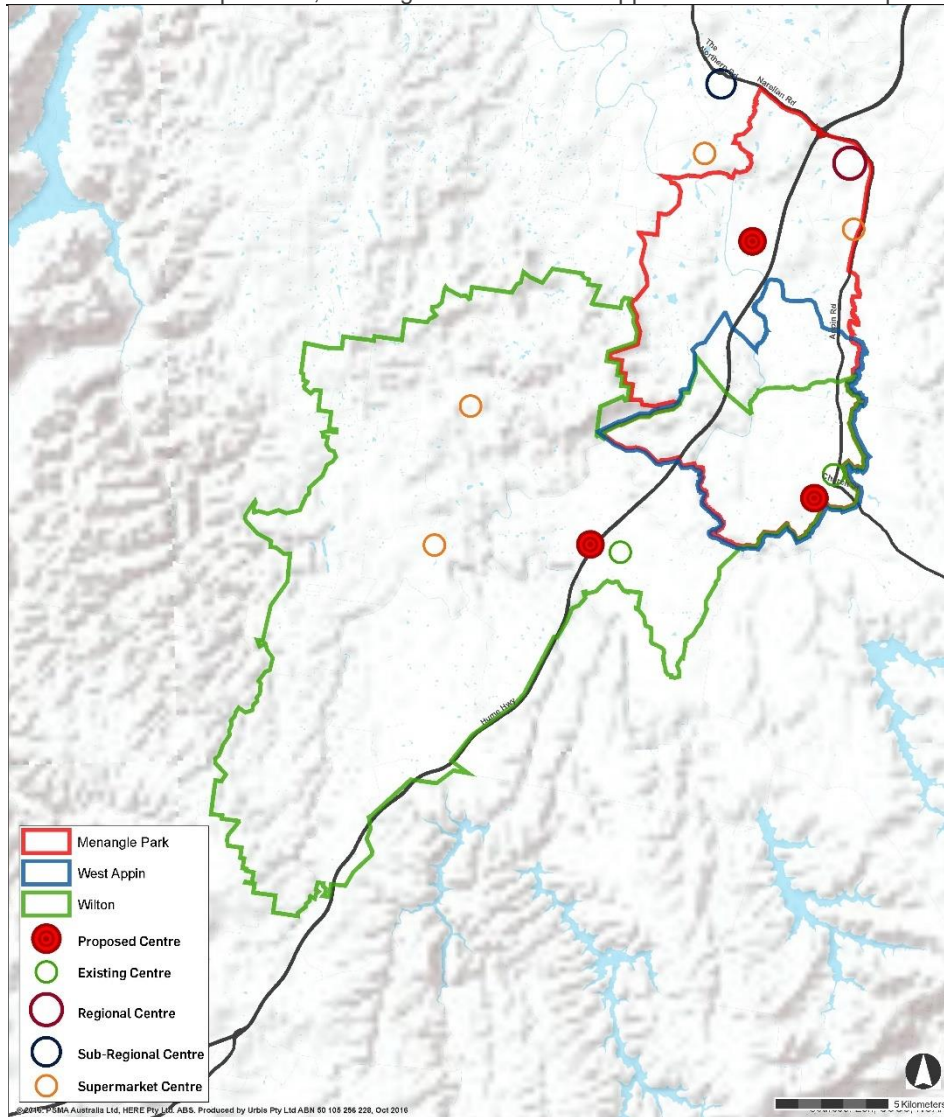
- The amount of expenditure that could be retained within each trade area to support new major tenants (DDS's and supermarkets) across a future network of shopping centres
- The market shares required to support anchor tenants at the proposed centres at Wilton, Menangle Park and West Appin, and the overall quantum of floorspace that could be supported at each of these centres
- The amount of residual spend available to support potential smaller centres across the study area.

Trade Area Overlap

Map 4.1 shows the outline of the trade areas that have been defined for new centres at Wilton, Menangle Park and West Appin. The map demonstrates that there is some overlap across each trade area concentrated around the West Appin release area. When assessing market capacity for new centres the assessment process ensures that there is no double counting of population or available expenditure.

Trade Area Overlap: Wilton, Menangle Park and West Appin

Map 4.1



4.1. WILTON

The analysis for Wilton indicates that:

- A sub regional shopping centre containing around **52,600 sq.m** GLA could be supported by the time residential development within the trade area is completed.
- This could include two DDSs (14,000 sq.m in total), two full line supermarkets (8,000 sq.m) and a third smaller format supermarket (1,500 sq.m), around 20,000 sq.m of mini major and specialty retail space and around 9,000 sq.m ancillary and non retail space
- Wilton would be the largest centre within the region and would draw from a broad trade area
- A centre of this scale would serve a trade area containing **147,000** residents on completion, including almost **53,000** within a primary trade area and a total retail spending market of \$2.167 billion on completion in \$2016 dollars
- The centre could be expected to achieve an overall market share of 13%, in other words it could capture 13% of total available expenditure within the trade area
- A centre of this size has the potential to support around 1,400 ongoing jobs, including a mix of full time and part time employment.

Wilton would be the largest centre within the region and would draw from a broad trade area with a high dependence on car-based customers. The scale of floorspace and number of major tenants is similar to the existing Rouse Hill Town Centre.

Key data and analysis supporting this assessment is provided in the following sections.

Trade Area

The trade area for a sub-regional shopping centre at Wilton (shown in Map 4.2) has been defined having regard to the following key factors:

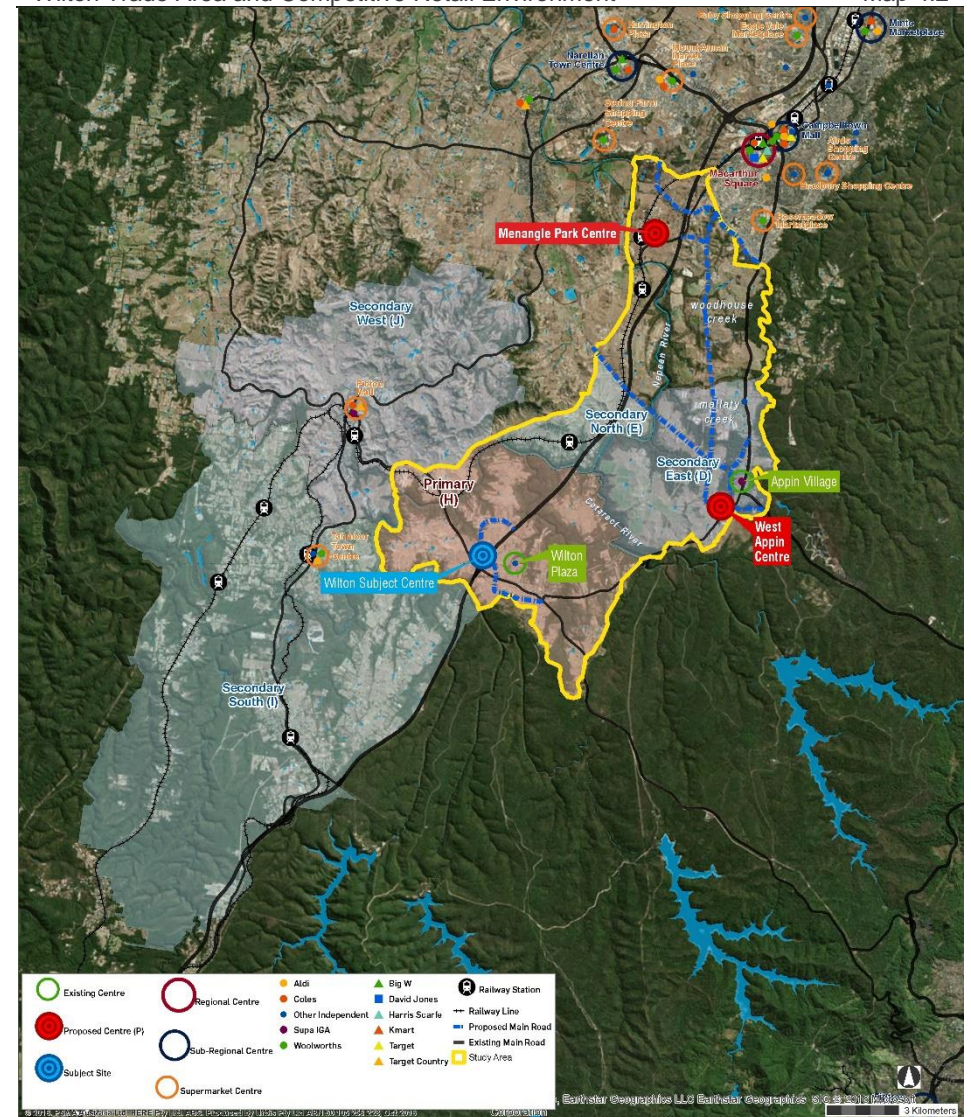
- Access/convenience to shopping through road and public transport connection
- Natural barriers to trade
- Existing retail centres impacting on potential trade.

The trade area has been defined as follows:

- A **primary trade area** which comprises of the Wilton Priority Growth Area. It extends to the Cataract River to the east. Picton Mall with Coles, IGA and Target Country limits the extent of the primary trade area to the west
- A **secondary north trade area** which extends from Menangle Road and the proposed Finns Road extension to the Nepean River to the south
- A **secondary south trade area** extends to Yerrinbool, close to halfway between the proposed Wilton Centre and Highlands Marketplace located at Mittagong. Tahmoor Town Centre is located within this sector
- A **secondary east trade area** is bounded by the West Appin Priority Growth Area boundary to the east, south and west, and also consists of the southern portion of the South Gilead precinct to the north
- A **secondary west trade area** consists of townships in Picton, Razorback and Mowbray Park. The extent of the secondary west trade area to the north is limited by retail competition in Narellan, Spring Farm and Mt Annan

Wilton Trade Area and Competitive Retail Environment

Map 4.2



Competitive Environment

Existing retail competition within the trade area is illustrated in the trade area map and summarised in Table 4.1.

Competitive Retail Environment

Wilton Trade Area

Table 4.1

Location	GLA (Retail)		Role
	sq.m	Anchor Tenants	
Picton Mall & Town Centre	9,600	Coles (2,900 sq.m), IGA (1,300 sq.m)	Weekly and top up food retail for Picton residents
Tahmoor Town Centre	12,600	Woolworths (3,500 sq.m), ALDI (1,500 sq.m), Foodland (2,400 sq.m)	Weekly and top up food retail for Tahmoor residents
Appin Village	2,800	Supa IGA (1,500 sq.m)	Top up food retail for Appin residents
Wilton Plaza	1,600	SPAR (500 sq.m)	Top up food retail for Bingara Gorge residents

Source: SGS Economics & Planning, Urbis

We note that there was planning approval for a new Big W store at Tahmoor, but the consent has lapsed. There is also a rezoning proposal at Picton to expand DDS provision, however the rezoning has yet to proceed.

Current and Future Population

Table 4.2 shows that the Wilton trade area population is projected to reach **147,200** people on completion of assumed residential development. This reflects an additional 117,200 residents compared to the current estimated population of 30,000. The population change is also shown in Map 4.3 and 4.4 overleaf.

Wilton Trade Area Population

Current and On Completion

Table 4.2

	Population		Population
	2016	On Completion	Additional
Primary:			
Total Primary	3,300	52,800	+49,500
Secondary:			
North	800	800	-
South	16,900	22,700	+5,800
East	2,600	60,900	+58,300
West	6,300	9,900	+3,600
Total Secondary	26,800	94,300	+67,500
Main Trade Area	30,000	147,200	+117,200

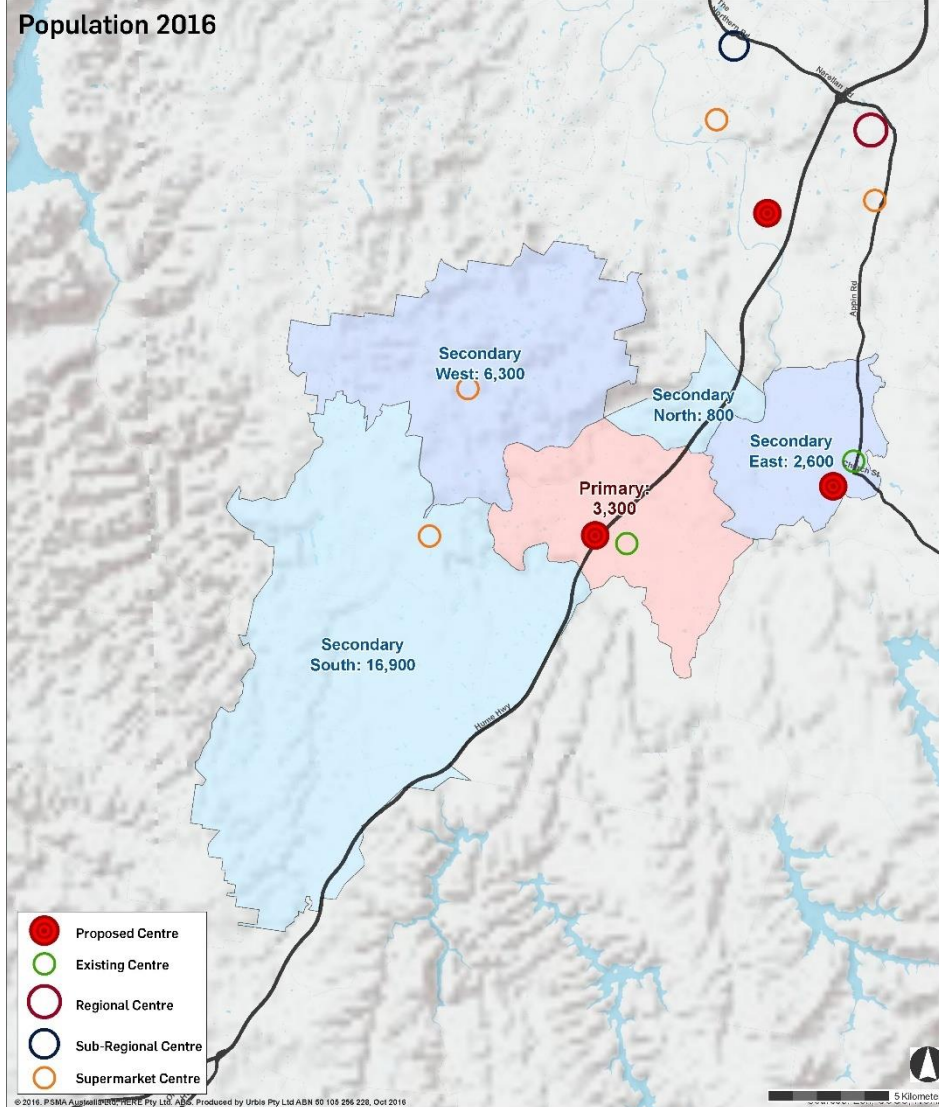
Source: ABS; The Department of Planning & Environment, NSW, .id consultants SAFI forecasts; Urbis

Population growth will be mainly driven by:

- An additional 17,700 dwellings in the precincts of Bingara Gorge, Wilton South East, Wilton New Town Centre, Wilton North and Wilton West within the primary trade area
- An additional 20,800 dwellings in the precincts of West Appin and South Gilead within the secondary east trade area.

Wilton Trade Area Population Estimate 2016

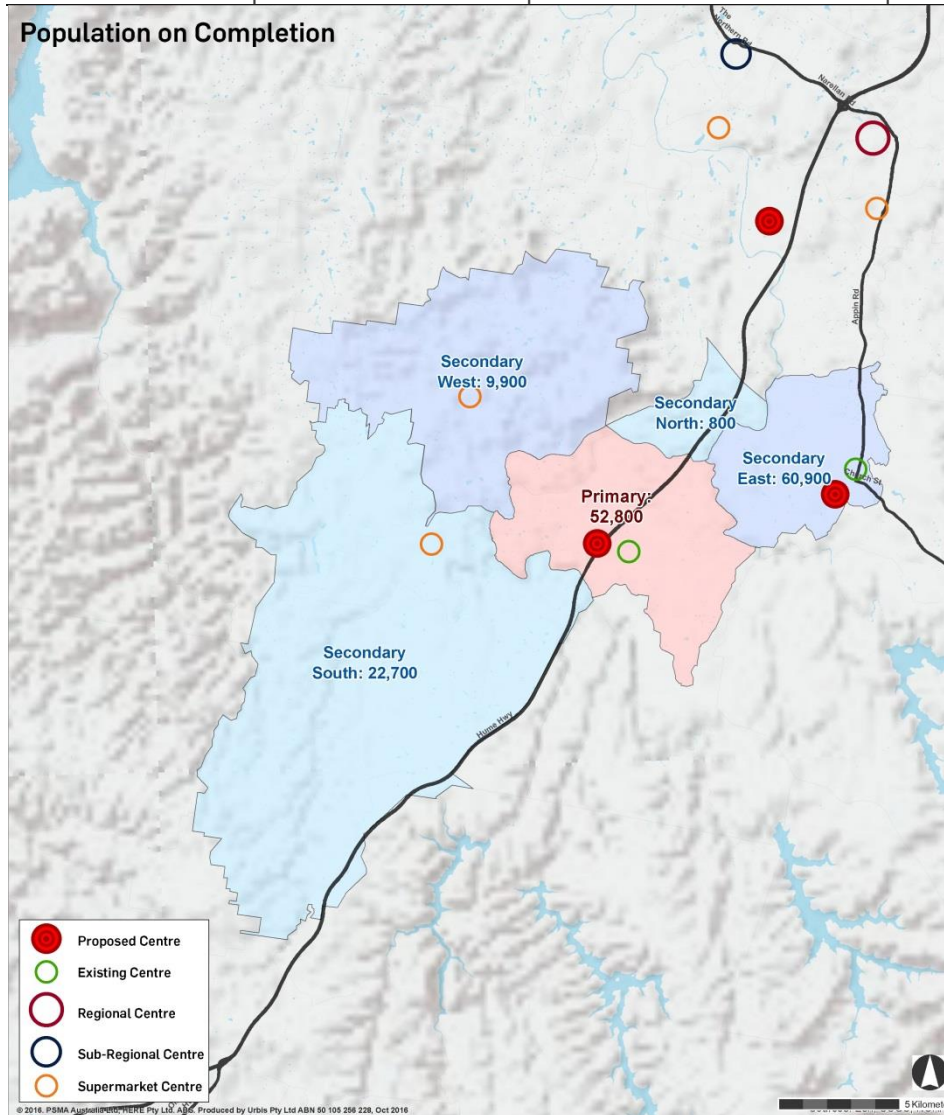
Map 4.3



Wilton Trade Area Population Estimate on Completion

Map 4.4

Population on Completion



Spending Market

Table 4.3 and Chart 4.1 on the following page show the size of the retail spending market currently and on completion of assumed residential development. It shows total retail spending of \$2.167 billion upon completion.

The highest proportion of spending within the trade area will be directed to food retail (41%, equal to \$880 million on completion).

Discretionary spending (apparel, homewares, leisure/general, retail services) will account for 32% of the total retail spending market on completion (equal to \$693 million).

The highest amount of available retail expenditure is contained within secondary east trade area (41%), which contains the West Appin release area.

Market Potential at Capacity

Discount Department Store Capacity

Tables 4.4 and 4.5 demonstrate that there is expected to be potential to provide up to four DDS's within the trade area (including the existing Country Target). This includes **two DDSs at Wilton town centre** at capacity.

Table 4.4 outlines that with a trade area population of 147,200, there is capacity to support 22,200 sq.m DDS floorspace at sustainable productivity rates.

Table 3.6 demonstrates that two DDS stores at Wilton town centre could be expected to achieve market shares ranging from 75% within the primary trade area to 40% in the secondary east trade area. These shares, together with a small allowance for spend from beyond the trade area and food retail sales could support two 7,000 sq.m DDSs at sustainable productivity rates.

Supermarket Capacity

Tables 4.6 and 4.7 demonstrate that there is potential to provide up to nine additional supermarkets within the trade area, including **three supermarkets at Wilton town centre at capacity**. For Wilton, this would include two full line major supermarkets (of around 4,000 sq.m) and a smaller supermarket (such as ALDI or IGA) of around 1,500 sq.m.

Table 4.6 demonstrates that there is capacity to support 42,200 sq.m supermarket floorspace across the trade area at sustainable turnover rates of around \$10,641 per sq.m. This includes provision of existing supermarkets.

Table 4.7 demonstrates that three supermarkets at Wilton town centre could collectively be expected to achieve market shares ranging from 45% within the primary trade area to 10% in the secondary east trade area. These shares, together with a small allowance for spend from beyond the trade area and general merchandise sales could support 9,500 sq.m of supermarket floorspace at sustainable productivity rates.

Wilton Trade Area Retail Spending Market

Current and On Completion (\$2016)

Table 4.3

Current (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	17	6	4	3	5	5	1	41
Secondary:								
North	5	2	1	1	1	1	0	12
South	104	31	22	15	27	28	8	236
East	14	4	3	2	4	4	1	32
West	37	13	9	6	11	11	3	89
Total Secondary	160	50	36	24	44	44	12	370
Main Trade Area	177	56	40	27	49	49	14	410

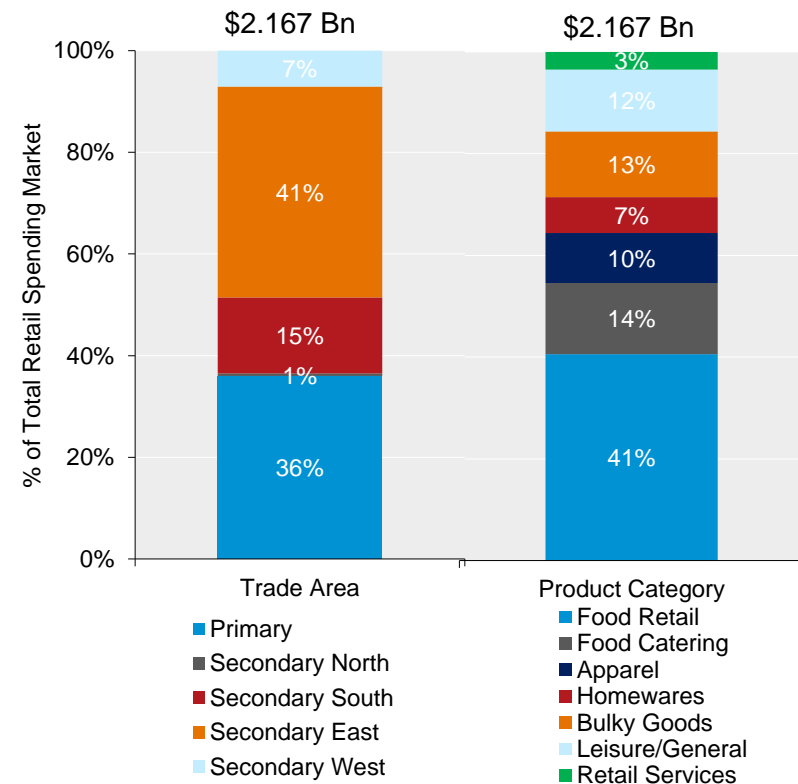
On Completion (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	316	110	77	55	101	95	27	780
Secondary:								
North	5	2	1	1	2	1	0	12
South	135	44	30	23	41	40	11	323
East	364	126	89	63	116	109	31	898
West	60	22	16	11	20	19	6	154
Total Secondary	564	194	135	98	179	169	48	1,387
Main Trade Area	880	303	212	153	280	264	75	2,167

Source: ABS; MarketInfo 2012; Urbis

Retail Spending Market Composition

On Completion

Chart 4.1



Source: ABS; MarketInfo 2012; Urbis

Wilton Trade Area DDS Capacity Assessment

At Capacity

Table 4.4

Trade Area DDS Spending		\$M
Primary		49.1
Secondary North		0.8
Secondary South		20.0
Secondary East		56.6
Secondary West		9.9
Total		136.4
Spend Retention by Trade Area DDSs		
	%	\$M
Primary	60%	29.5
Secondary North	50%	10.0
Secondary South	50%	3.5
Secondary East	50%	0.4
Secondary West	35%	28.3
Sub Total		71.6
Plus Turnover from Beyond	5%	3.8
Plus Food and Grocery	4%	3.1
Available Turnover to Trade Area DDSs		78.5
Indicative Trade Area DDSs		sq.m
Wilton TC DDS 1		7,000
Wilton TC DDS 2		7,000
West Appin TC DDS 1		7,000
Existing Trade Area DDS		1,200
Total DDS Floorspace		22,200
Productivity - All DDS (\$ per sq.m)		\$3,538

Source: Urbis

Wilton Town Centre DDS Market Share Assessment

At Capacity

Table 4.5

Wilton Town Centre Market Share	%	\$M
Primary	75%	22.1
Secondary North	50%	0.2
Secondary South	65%	6.5
Secondary East	40%	11.3
Secondary West	65%	2.2
Sub Total		42.4
Plus Turnover from Beyond	5%	2.2
Plus Food and Grocery	4%	1.9
Total Store(s) Potential		46.5

DDS Floorspace at Wilton Town Centre

DDS 1	sq.m	7,000
DDS 2	sq.m	7,000
Total Floorspace	sq.m	14,000
Productivity (indicative)	\$ per sq.m	\$3,319

Source: Urbis

Wilton Trade Area Supermarket Capacity Assessment

At Capacity

Table 4.6

Trade Area Supermarket Spending		\$M
Primary		192.3
Secondary North		3.0
Secondary South		82.3
Secondary East		221.5
Secondary West		36.7
Total		535.8
Spend Retention by Trade Area		
Supermarkets	%	\$M
Primary	70%	134.6
Secondary North	70%	2.1
Secondary South	70%	57.6
Secondary East	70%	155.0
Secondary West	70%	25.7
Sub Total		375.0
Plus Turnover from Beyond	5%	19.7
Plus Take Home Liquor	3%	13.8
Plus General Merchandise	9%	40.4
Available Turnover to Trade Area		449.0
Indicative Trade Area Supermarkets		sq.m
Wilton TC Full Line Supermarket 1		4,000
Wilton TC Full Line Supermarket 2		4,000
Wilton TC Small Supermarket		1,500
West Appin TC Full Line Supermarket 1		4,000
West Appin TC Full Line Supermarket 2		4,000
West Appin TC Small Supermarket		1,500
Bingara Gorge / Wilton Plaza Additional Supermarket		4,000
Wilton Environs Supermarket		2,800
Wilton / West Appin Environs Supermarket		2,800
Existing Trade Area Supermarkets		13,596
Total Supermarket Floorspace		42,196
Productivity - All Supermarkets (\$ per sq.m)		\$10,641

Source: Urbis

Wilton Town Centre Supermarket Market Share Assessment

At Capacity

Table 4.7

Wilton Town Centre Market Share	%	\$M
Primary	45%	60.6
Secondary North	10%	0.2
Secondary South	10%	5.8
Secondary East	10%	15.5
Secondary West	15%	3.9
Sub Total		85.9
Plus Turnover from Beyond	5%	4.5
Plus Take Home Liquor	5%	4.8
Plus General Merchandise	10%	10.6
Total Store(s) Potential		105.7

Supermarket Floorspace at Wilton Town Centre

Supermarket 1	sq.m	4,000
Supermarket 2	sq.m	4,000
Supermarket 3	sq.m	1,500
Total Floorspace	sq.m	9,500
Productivity (indicative)	\$ per sq.m	\$11,131

Source: Urbis

Supportable Floorspace

Having established the capacity for anchor tenant floorspace at Wilton town centre, benchmark ratios between anchor tenants floorspace and other uses were used to derive the total quantum of gross leasable area (GLA).

Table 4.8 demonstrates that around 52,600 sq.m retail and ancillary floorspace could be supported within Wilton Town Centre at capacity. This includes:

- 28,800 sq.m anchor and mini major floorspace
- 14,700 sq.m specialty retail
- 9,100 sq.m non retail floorspace which could include a mix of gym, medical, childcare, civic and office floorspace

Wilton Town Centre Indicative Floorspace Mix

At Capacity

Table 4.8

Anchor	sq.m
Discount Department Stores	14,000
Supermarkets	9,500
Total Anchor	23,500
Mini Majors ¹	5,300
Specialties	sq.m
Food Specialties	2,700
Non-Food Specialties	8,400
Retail Services	1,500
Non-Retail & Ancillary	8,500
Total Centre	49,900
External Tenancies	sq.m
Retail Specialties	2,100
Non-Retail Specialties	600
Total Floorspace	52,600
Floorspace Summary:	
Anchor and Mini Majors	28,800
Specialty Retail	14,700
Non-Retail	9,100
Total Floorspace	52,600

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Market Share Assessment

Table 4.9 shows indicative market shares by product group and trade area sector for the proposed Wilton town centre. This assumes turnover performance in line with current benchmark rates.

The table demonstrates that Wilton Town Centre would achieve a 22% market share of total available expenditure within the primary trade area, and a 13% market share of total available expenditure within the main trade area.

Wilton town centre can capture 25% of total available food retail spend within the primary trade area, and 13% within the main trade area.

Wilton Town Centre

Indicative Market Shares by Product Group

Table 4.9

	Primary Trade Area	Main Trade Area
Food Retail	25%	13%
Food Catering	13%	9%
Apparel	36%	25%
Homewares	35%	24%
Leisure/ General	21%	15%
Retail Services	37%	19%
Total	22%	13%

Source: Urbis

4.2. MENANGLE PARK

The analysis for Menangle Park indicates that:

- A double -supermarket based shopping centre providing around 15,100 sq.m GLA could be supported by the time residential development within the trade area is completed.
- A centre of this scale would serve a trade area of 146,200 residents and a total retail spending market of \$2,126 million on completion in \$2016 dollars
- The centre could be expected to achieve an overall market share of 5%, in other words it could capture 5% of total available expenditure within the trade area
- A centre of this size has the potential to support around 500 operational jobs, including a mix of full time and part time employment.

The proximity to existing higher order retailing at Narellan and Campbelltown would impact on the ability to sustain DDS retail at Menangle Park. Retail development in this location could be integrated around the existing train station to maximise exposure to daily commuters. This configuration could provide a higher proportion of street front retail relative to other centres and more compact supermarkets (still providing a full line offer), potentially with a reduced car parking requirement.

Key data and analysis supporting this assessment is provided under the following sections.

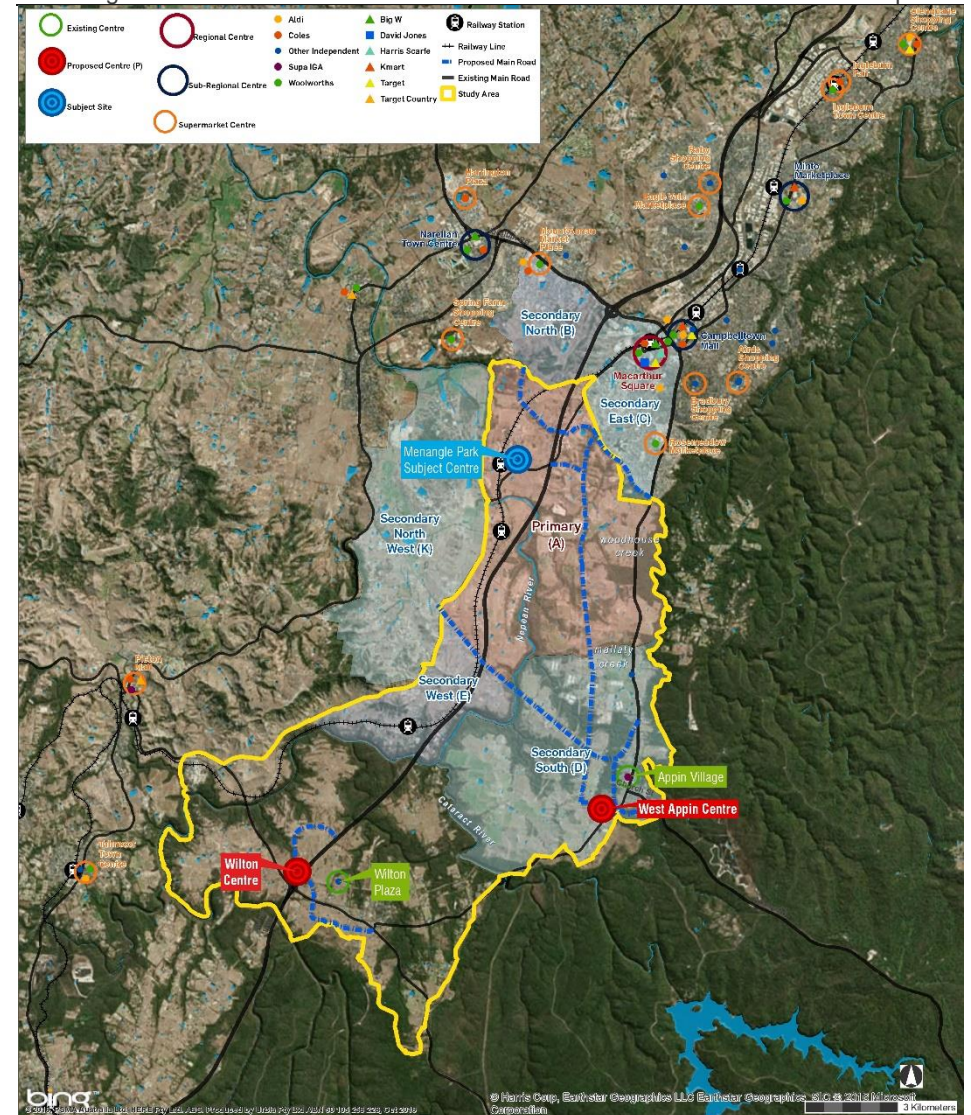
Trade Area

The trade area for a supermarket based shopping centre at Menangle Park (shown in Map 4.5) has been defined as follows:

- A **primary trade area** which is bounded by the Menangle Park and Mount Gilead Priority Growth Area to the north, east and west. It extends to the proposed Finns Road extension and Mallaty Creek to the south, which will act as a natural barrier to restrict trade from beyond.
- A **secondary north west trade area** which is bounded by Nepean River to the north, Remembrance Driveway to the west, and the GMPGA boundary to the west.
- A **secondary south trade area** which is bounded by the West Appin Priority Growth boundary to the east, south and west. This boundary is formed by the Nepean River and its tributaries, which form a natural barrier to trade.
- A **secondary west trade area** extends from Menangle Road and the proposed Finns Road extension to the Nepean River to the south. It is classified as a secondary trade area as it has a similar drive time to the proposed Menangle Park Centre, Wilton Centre and West Appin Centre.

Menangle Park Trade Area

Map 4.5



When considering potential for DDS retailing at Menangle Park two additional trade area sectors (the secondary north and secondary east) were included. The proximity of these sectors to existing higher order retail at Macarthur Square in particular as well as Narellan Town Centre limits the amount of expenditure that could be captured from these areas. They have been defined as follows:

- A **secondary north trade area** which consists of the suburb of Mt Annan, and is included within trade area analysis as proposed road connection will connect Mt Annan to Appin Road via Menangle Park. The extent of the trade area is constrained by significant retail competition from Narellan Town Centre, Mount Annan Marketplace and Spring Farm Shopping Centre
- A **secondary east trade area** is bounded by Narellan Road to the north, Appin road to the east and Hume Highway to the west. Residents within this trade area can access Menangle Park town centre via proposed extension to Englorie Park Drive. Market share in this area is likely to be small due to the presence of Macarthur Square and Campbelltown Mall.

Our analysis indicates that there is insufficient market capacity for DDS retail at Menangle Park, even with the inclusion of the secondary north and secondary east sectors. Accordingly, the secondary north and secondary east sectors were subsequently excluded from the supermarket capacity assessment. Without a DDS, supermarkets at Menangle Park would be unlikely to draw any significant volume of trade from these sectors.

Competitive Environment

Existing retail competition within the trade area is illustrated in the trade area map and summarised in Table 4.10. The table shows supermarket floorspace within existing centres in trade area. It is important to note that, with the exception of Appin Village, all of these centres are in the secondary north and secondary east sectors.

Competitive Retail Environment

Menangle Park Trade Area

Table 4.10

GLA (Retail)			
Location	sq.m	Anchor Tenants	Role
Macarthur Square	72,300	David Jones (12,300 sq.m), Big W (8,800 sq.m), Target (4,500 sq.m), Woolworths (4,200 sq.m), Coles (3,800 sq.m)	Regional Shopping Centre providing discretionary retail for local and regional residents
Mt Annan Marketplace	8,500	Woolworths (3,700 sq.m), Aldi (1,300 sq.m)	Weekly and top up food retail for Mt Annan Residents
Mt Annan Central	4,700	Coles (3,200 sq.m)	Weekly and top up food retail for Mt Annan Residents
Rosemeadow Marketplace	2,900	Woolworths (3,700 sq.m)	Weekly and top up food retail for Rosemeadow residents
Appin Village	2,800	Supa IGA (1,500 sq.m)	Top up food retail for Appin residents
Supermarkets			
Aldi Ambarvale	1,700		Top up food retail for Ambarvale residents

Source: PCA Shopping Database, Urbis

Current and Future Population

Table 4.11 shows that the Menangle Park trade area population is projected to reach **146,200** people on completion of assumed residential development. This reflects an additional 105,000 residents compared to the current estimate population of 41,200. The population change is also shown in Map 4.6 and 4.7 overleaf.

Menangle Park Trade Area Population

Current and On Completion

Table 4.11

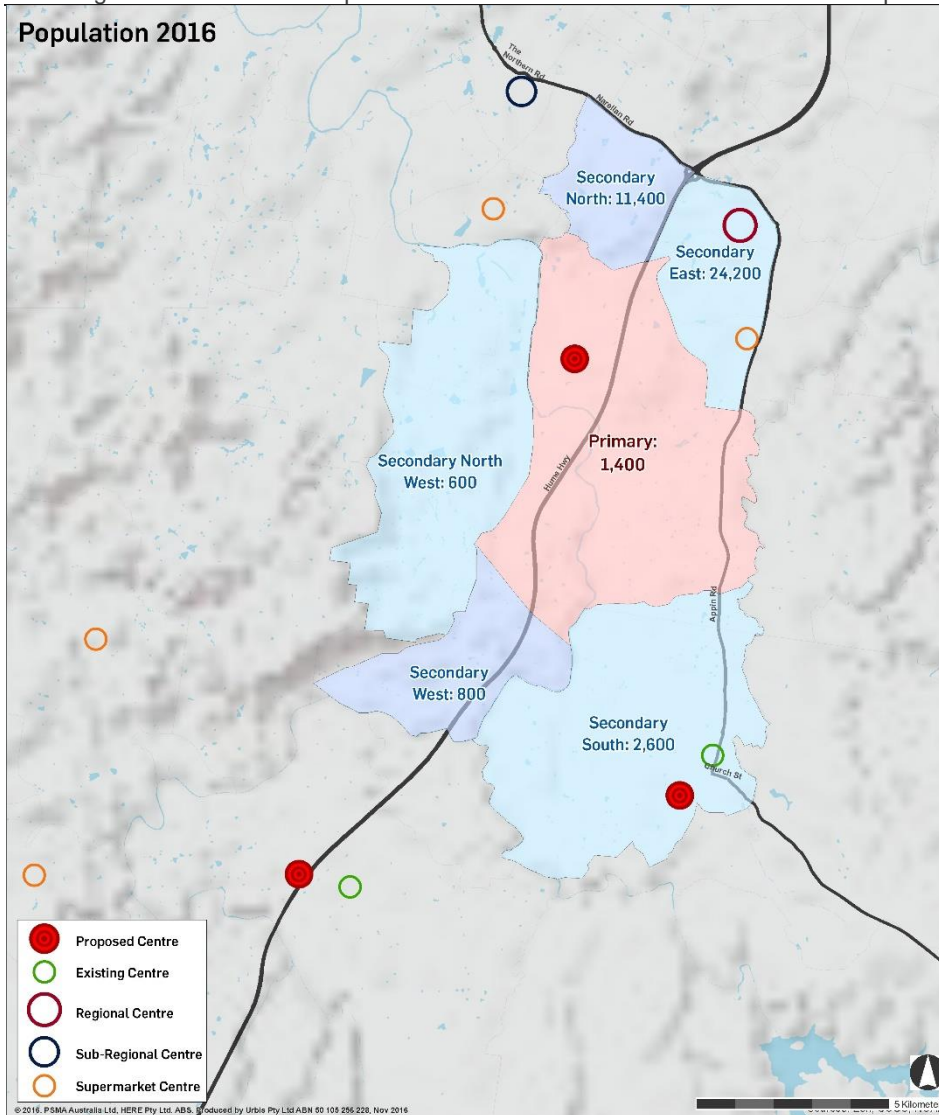
	Population		Population Growth
	2016	On Completion	Additional
Primary:			
Total Primary	1,400	40,700	+39,300
Secondary:			
North	11,400	11,800	+400
North West	600	1,300	+700
South	2,600	60,900	+58,300
East	24,200	30,700	+6,500
West	800	800	-
Total Secondary	39,800	105,500	+65,700
Main Trade Area	41,200	146,200	+105,000

Source: ABS; The Department of Planning & Environment, NSW, .id consultants SAFI forecasts; Urbis

Population growth will be mainly driven by:

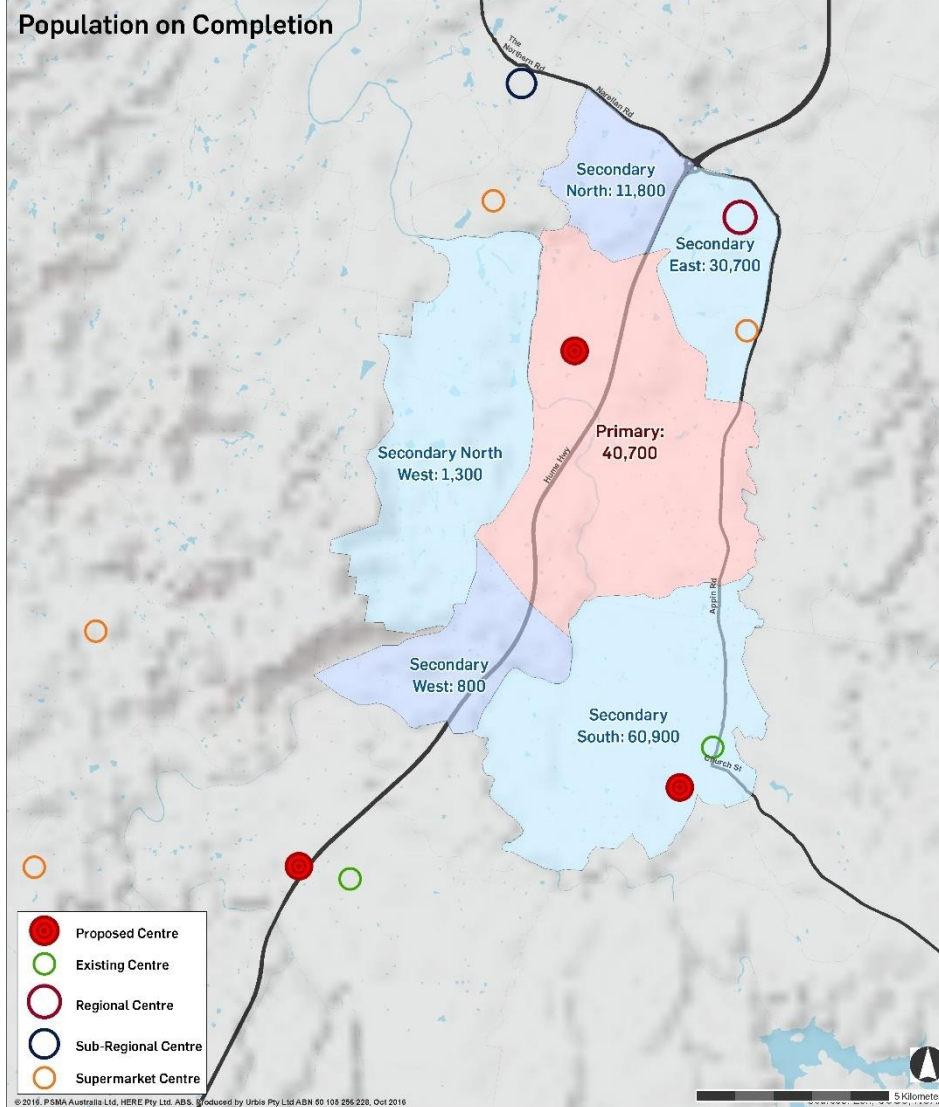
- An additional 13,990 dwellings in the precincts Menangle Park North and South, Mt Gilead, Balance Lands and South Gilead within the primary trade area
- An additional 20,800 dwellings in the precincts of West Appin and South Gilead within the secondary south trade area.

Population 2016



Menangle Park Trade Area Population Estimate on Completion

Map 4.7



Spending Market

Table 4.12 and Chart 4.2 show the size of the retail spending market currently and on completion of assumed residential development. It shows total retail spending of \$2.126 billion upon completion.

The highest proportion of spending within the trade area will be directed to food retail (40%, equal to \$850 million on completion)

Discretionary spending (apparel, homewares, leisure/general, retail services) accounts for 32% of the total retail spending market on completion (equal to \$680 million)

The highest available retail expenditure is contained within the secondary south trade area (42%), which contains the West Appin release area.

Market Potential at Capacity

Discount Department Store / Department Store Capacity

Our analysis indicates that there will be limited potential to support DDS/DS retail at Menangle Park, therefore this use has not been included in the final mix.

Table 4.14 shows that a DDS at Menangle Park town centre could be expected to achieve market shares ranging from 35% within the primary trade area to 5% in the secondary north and secondary east trade areas. The DDS would record an indicative turnover rate 35% below the current benchmark rate for a single DDS based shopping centre. As a result, a DDS at Menangle Park town centre is not considered viable.

The low market shares in the secondary north and east sectors reflect competition from existing DDS and department store retailing at Macarthur Square.

Supermarket Capacity

Tables 4.15 and 4.16 demonstrate that there is potential to provide up to seven additional supermarkets within the trade area, including **two full line supermarkets each of 3,200 sq.m at Menangle Park town centre at capacity.**

Table 4.15 demonstrates that there is capacity across the trade area to support 22,900 sq.m supermarket floorspace at sustainable turnover rates of around \$13,994 per sq.m. This includes provision of existing supermarkets within the trade area.

Table 4.16 demonstrates that two supermarkets at Menangle Park town centre could collectively achieve market shares ranging from 45% within the primary trade area to 5% in the secondary south trade area (The secondary east and secondary north trade areas have been excluded from the assessment and therefore no market share is captured from these sectors). These shares, together with a small allowance for spend from beyond the trade area and general merchandise sales could support 6,400 sq.m of supermarket floorspace at sustainable productivity rates.

Menangle Park Trade Area Retail Spending Market

Current and On Completion (\$2016)

Table 4.12

Current (\$M)	Food Retail	Food Catering	Apparel	Home- wares	Bulky Goods	Leisure/ General	Retail Services	Total Retail
Total Primary	6	2	1	1	2	2	0	14
Secondary:								
North	68	24	19	12	21	20	6	170
North West	6	2	1	1	2	2	1	14
South	14	4	3	2	4	4	1	32
East	133	45	31	21	32	34	10	306
West	5	2	1	1	1	1	0	12
Total Secondary	226	77	56	37	60	61	18	534
Main Trade Area	232	79	58	37	61	63	18	549

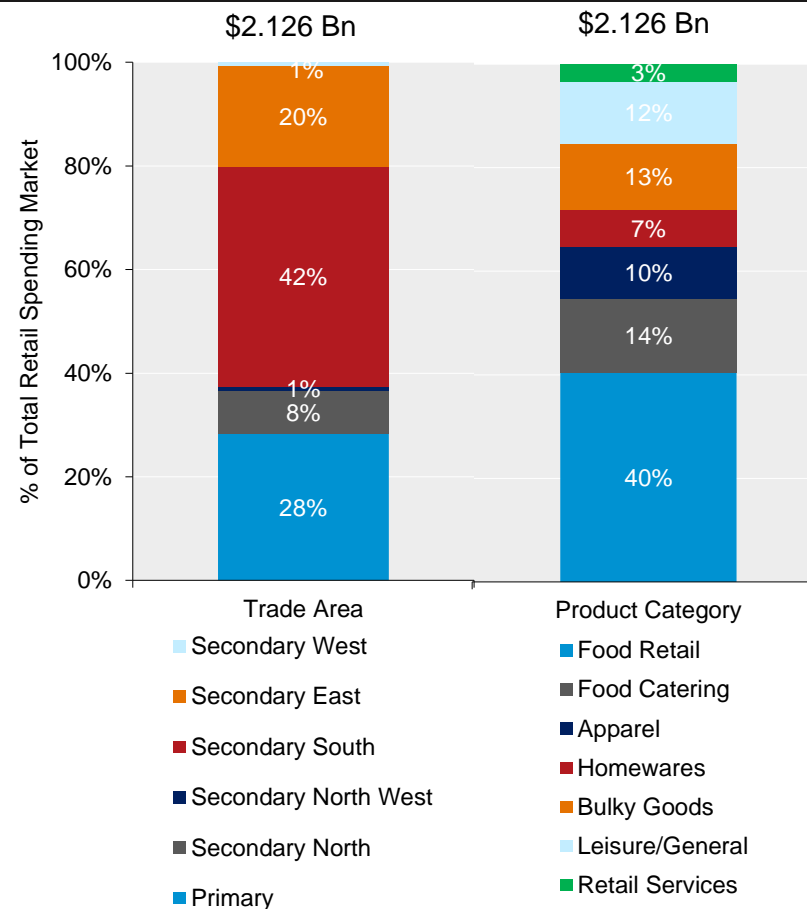
On Completion (\$M)	Food Retail	Food Catering	Apparel	Home- wares	Bulky Goods	Leisure/ General	Retail Services	Total Retail
Total Primary	243	84	59	42	78	73	21	601
Secondary:								
North	67	26	20	13	23	21	6	176
North West	8	3	2	1	2	3	1	20
South	364	126	89	63	116	109	31	898
East	172	62	42	31	47	48	14	418
West	5	2	1	1	2	1	0	12
Total Secondary	617	219	154	110	191	183	52	1,525
Main Trade Area	860	303	213	152	268	256	73	2,126

Source: ABS; MarketInfo 2012; Urbis

Retail Spending Market Composition

On Completion

Chart 4.2



Source: ABS; MarketInfo 2012; Urbis

Menangle Park Trade Area DDS Capacity Assessment

At Capacity

Table 4.13

Trade Area DDS / DS Spending		\$M
Primary		42.9
Secondary North		13.1
Secondary North West		1.4
Secondary South		64.2
Secondary East		28.7
Secondary West		0.9
Total		151.2
Spend Retention by Trade Area DDSs / DS	%	\$M
Primary	60%	25.7
Secondary North	45%	5.9
Secondary North West	50%	0.7
Secondary South	60%	38.5
Secondary East	65%	18.7
Secondary West	50%	0.4
Sub Total		90.0
Plus Turnover from Beyond	30%	38.6
Plus Food and Grocery	4%	5.4
Available Turnover to Trade Area DDSs		133.9
Indicative Trade Area DDSs / DS		sq.m
West Appin TC DDS 1		7,000
Existing Trade Area DDS's		25,485
Total DDS Floorspace		32,485
Productivity - All DDS (\$ per sq.m)		\$3,391

Source: Urbis

Menangle Park Centre DDS Market Share Assessment

At Capacity

Table 4.14

Menangle Park Town Centre Market Share		%	\$M
Primary		35%	9.0
Secondary North		5%	0.3
Secondary North West		20%	0.1
Secondary South		10%	3.9
Secondary East		5%	0.9
Secondary West		15%	0.1
Sub Total			14.3
Plus Turnover from Beyond		5%	0.8
Plus Food and Grocery		4%	0.6
Total Store(s) Potential			15.7
DDS Floorspace at Menangle Park Town Centre			
DDS 1	sq.m		7,000
Total Floorspace	sq.m		7,000
Productivity (indicative)	\$ per sq.m		\$2,240

Source: Urbis

Menangle Park Trade Area Supermarket Capacity Assessment

At Capacity

Table 4.15

Trade Area Supermarket Spending	\$M
Primary	148.1
Secondary North	40.9
Secondary North West	5.0
Secondary South	221.5
Secondary East	106.8
Secondary West	3.0
Total	525.4

Spend Retention by Trade Area Supermarkets	%	\$M
Primary	70%	103.7
Secondary North	0%	0.0
Secondary North West	50%	2.5
Secondary South	70%	155.0
Secondary East	0%	0.0
Secondary West	65%	1.9
Sub Total		263.2
Plus Turnover from Beyond	5%	13.9
Plus Take Home Liquor	5%	14.6
Plus General Merchandise	9%	28.8
Available Turnover to Trade Area Supermarkets		320.5

Indicative Trade Area Supermarkets	sq.m
Menangle Park TC Full Line Supermarket 1	3,200
Menangle Park TC Full Line Supermarket 2	3,200
Mt Gilead TC Full Line Supermarket	4,000
West Appin TC Full Line Supermarket 1	4,000
West Appin TC Full Line Supermarket 2	4,000
West Appin TC Small Supermarket	1,500
Menangle Environs Small Supermarket	1,500
Existing Trade Area Supermarkets	1,500
Total Supermarket Floorspace	22,900
Productivity - All Supermarkets (\$ per sq.m)	\$13,994

Source: Urbis

Menangle Park Town Centre Supermarket Market Share

Assessment

At Capacity

Table 4.16

Menangle Park Town Centre Market Share	%	\$M
Primary	45%	46.7
Secondary North	0%	0.0
Secondary North West	35%	0.9
Secondary South	5%	7.8
Secondary East	0%	0.0
Secondary West	20%	0.4
Sub Total		55.7
Plus Turnover from Beyond	5%	2.9
Plus Take Home Liquor	5%	3.1
Plus General Merchandise	8%	5.4
Total Store(s) Potential		67.1

Supermarket Floorspace at Menangle Park

Supermarket 1	sq.m	3,200
Supermarket 2	sq.m	3,200
Total Floorspace	sq.m	6,400
Productivity (indicative)	\$ per sq.m	\$10,478

Source: Urbis

Total Centre Capacity

Having established the capacity for anchor tenant floorspace at Menangle Park town centre, benchmark ratios between anchor tenants floorspace and other uses is used to derive the total amount of gross leasable area (GLA).

Table 4.17 demonstrates that around 15,100 sq.m retail and ancillary floorspace could be supported within a town centre at Menangle Park This includes:

- 7,600 sq.m anchor and mini major floorspace
- 4,800 sq.m specialty retail
- 2,700 sq.m non retail floorspace which could include a mix of gym, medical, childcare, civic and office floorspace.

Given its proximity to a train station, this centre could be developed with a transit-focus with a main-street feel.

Menangle Park Town Centre Indicative Floorspace Mix

At Capacity

Table 4.17

Anchor	sq.m
Supermarkets	6,400
Mini Majors ¹	1,200
Specialties	sq.m
Food Specialties	1,500
Non-Food Specialties	1,600
Retail Services	500
Non-Retail & Ancillary	2,400
Total Centre	13,600
External Tenancies	sq.m
Retail Specialties	1,200
Non-Retail Specialties	300
Total Floorspace	15,100
Floorspace Summary:	
Anchor and Mini Majors	7,600
Specialty Retail	4,800
Non-Retail	2,700
Total Floorspace	15,100

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Market Share Assessment

Table 4.18 shows indicative market shares by product group and trade area sector for the proposed Wilton town centre. This assumes turnover performance in line with current benchmark rates.

The table demonstrates that Menangle Park town centre can achieve a 13% market share of total spending within the primary trade area, and a 5% market share of total spending within the main trade area.

Menangle Park Town Centre

Indicative Market Shares by Product Group Table 4.18

	Primary Trade Area	Main Trade Area
Food Retail	25%	8%
Food Catering	7%	3%
Apparel	4%	2%
Homewares	3%	1%
Leisure/ General	9%	4%
Retail Services	17%	6%
Total	13%	5%

Source: Urbis

4.3. WEST APPIN

The analysis for West Appin indicates that:

- A sub-regional shopping centre containing around 32,600 sq.m GLA could be supported by the time residential development within the trade area is completed.
- This could include one discount department store (7,000 sq.m), two full line supermarkets and a third smaller supermarket supported by around 11,100 sq.m specialty retail and related services.
- A centre of this scale would be serve a trade area of 80,000 residents and a total retail spending market of \$1,288 million on completion
- The centre could be expected to achieve an overall market share of 16%, in other words it could capture 16% of total available expenditure within the trade area
- A centre of this size has the potential to support around 1,100 operational jobs, including a mix of full time and part time employment.

Key data and analysis supporting this assessment is provided under the following sections.

Trade Area

The trade area for a sub-regional shopping centre at West Appin (shown in Map 3.9) has been defined having regard to the following key factors:

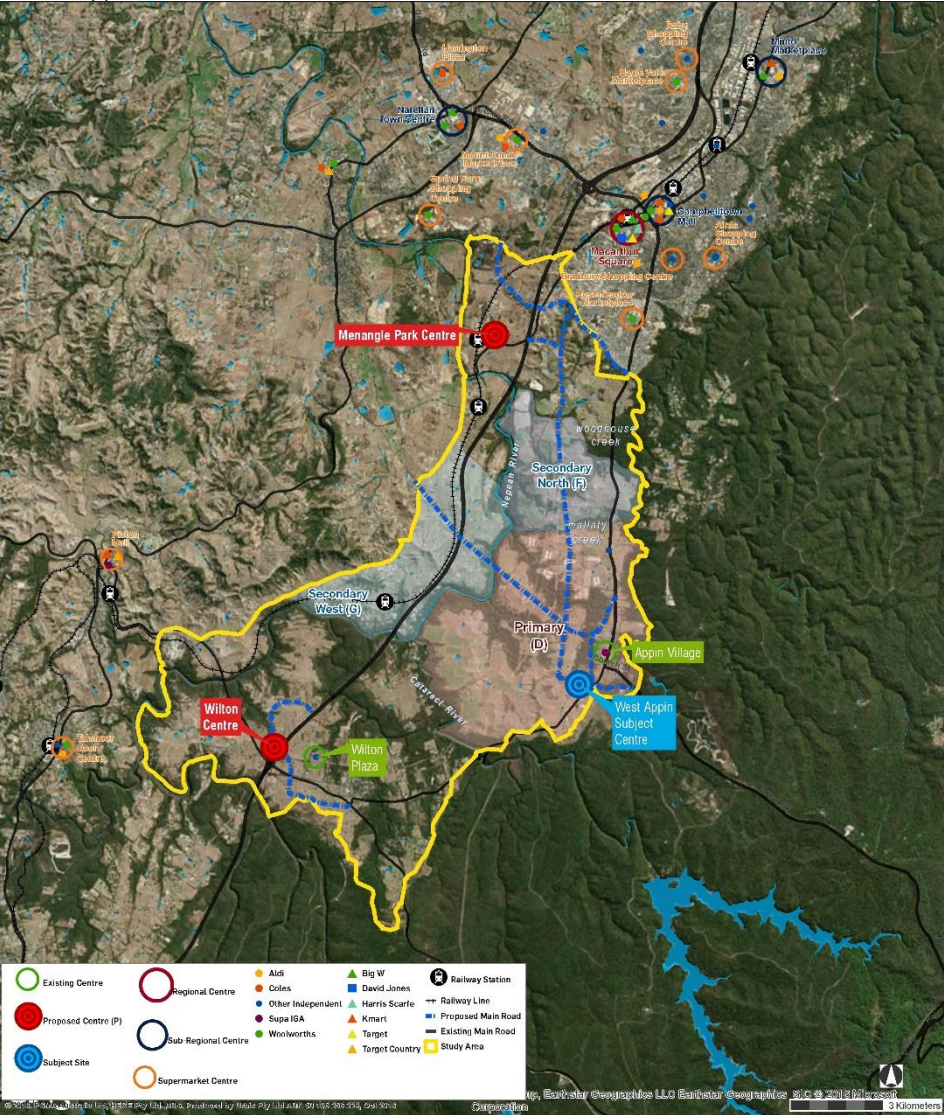
- Access/convenience to shopping through road and public transport connection
- Natural barriers to trade
- Existing retail centres impacting on potential trade.

The trade area has been defined as follows:

- A **primary trade area** which is bounded by Mallaty Creek to the north, the West Appin Priority Growth Area boundary to the east, south and west (Nepean River and its tributaries)
- A **secondary north trade area** which is bounded by Woodhouse Creek to the north, the GMPGA boundary to the east and the Menangle Park and Mt Gilead precinct boundary to the west (Nepean River)
- A **secondary west trade area** which extends from Moreton Park Road to the north to Nepean River to the south.

West Appin Trade Area

Map 4.8



Competitive Environment

The only existing retail provision of note within the trade area is Appin Village which contains strip retailing within the Appin Corner development, the Appin Road Shopping Centre and a Supa IGA store (1,500 sq.m). In addition to the Supa IGA we estimate that strip retailing provides around 1,300 sq.m floorspace in total.

Current and Future Population

Table 3.18 shows that the West Appin trade area population is projected to reach **80,000** people on completion of assumed residential development. This reflects an additional 76,400 residents compared to the current estimated population of 3,600. The population change is also shown in Map 3.10 and 3.11 overleaf.

West Appin Trade Area Population

Current and on Completion

Table 4.19

	Population		Population Growth
	2016	On Completion	Additional
Primary:			
Total Primary	2,600	60,900	+58,300
Secondary:			
North	200	18,300	+18,100
West	800	800	-
Total Secondary	1,000	19,100	+18,100
Main Trade Area	3,600	80,000	+76,400

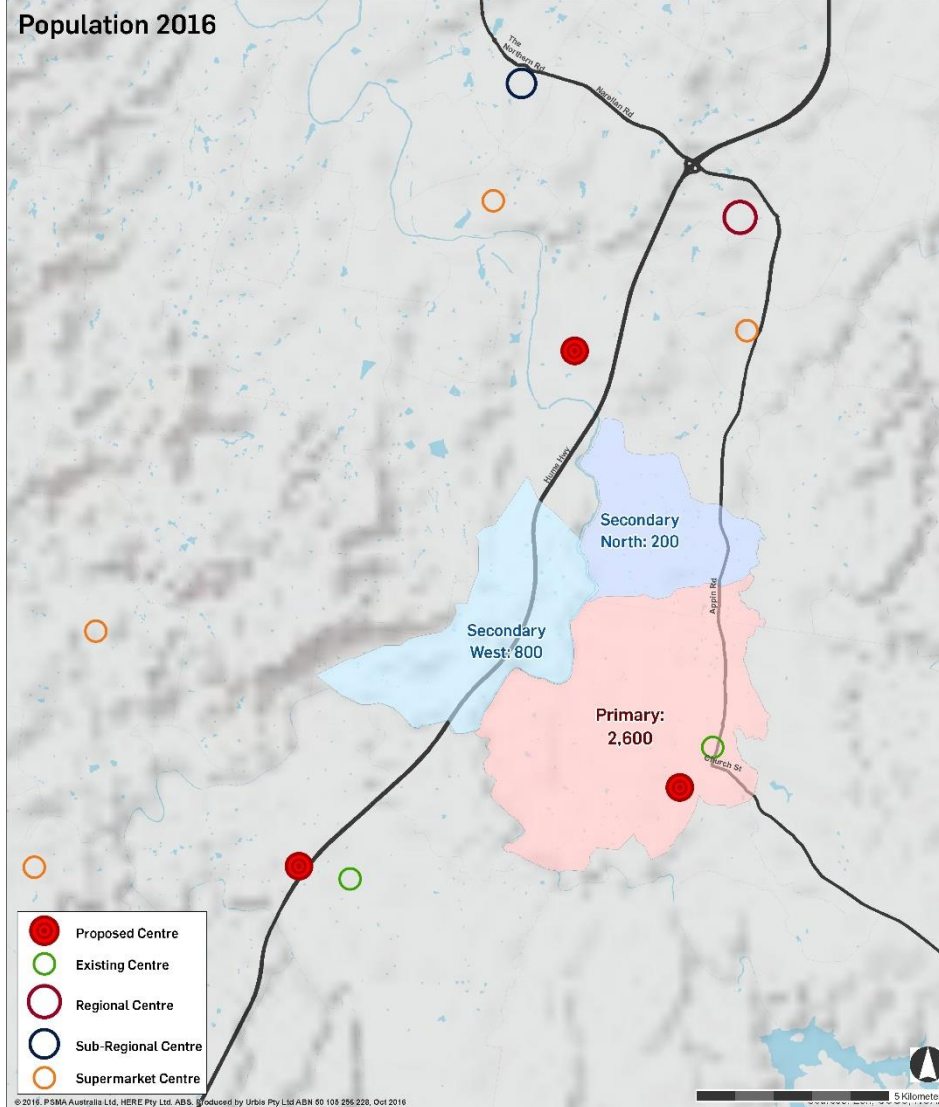
Source: ABS; The Department of Planning & Environment, NSW, .id consultants SAFI forecasts; Urbis

Population growth will be mainly driven by:

- An additional 20,800 dwellings in the precincts of West Appin and South Gilead within the primary trade area
- An additional 6,500 dwellings in the precincts of Balance Lands and South Gilead in the secondary north trade area.

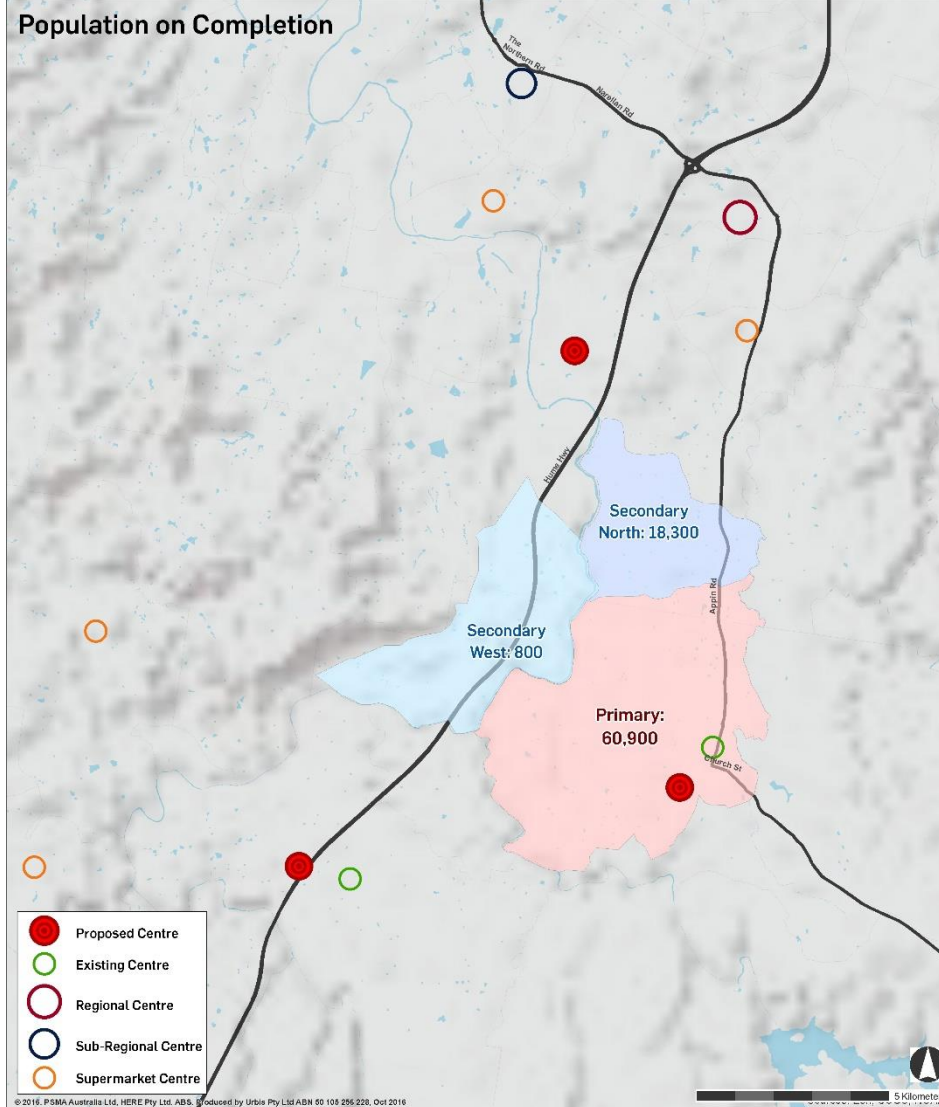
West Appin Trade Area Population Estimate 2016

Map 4.9



West Appin Trade Area Population on Completion

Map 4.10



West Appin Spending Market

Table 4.20 and Chart 4.3 show the size of the retail spending market currently and on completion of assumed residential development. It shows total retail spending of \$1.288 billion upon completion.

The highest proportion of spending within the trade area would be directed to food retail (37%, equal to \$477 million on completion).

Discretionary spending (apparel, homewares, leisure/general, retail services) accounts for 35% of the total retail spending market on completion (equal to \$451 million).

The highest amount of total retail spend is derived from the primary trade area (41%), which contains the West Appin release area.

Market Potential at Capacity

Discount Department Store Capacity

Tables 4.21 and 4.22 demonstrate that there is expected to be potential to provide a **single DDS at West Appin town centre** at capacity.

Table 4.21 outlines that with a trade area population of 80,000 there is capacity to support 7,000 sq.m DDS floorspace at West Appin town centre at an indicative turnover rate that would be 28% above the current benchmark rate for a single DDS based shopping centre. This equates to a sustainable productivity rate of \$4,397 per sq.m.

In Table 4.22, as the only assumed DDS within the trade area it would capture a market share of 100%.

In our view, a single strong performing DDS at West Appin would be more appropriate than seeking to split the available spend to accommodate two poorly performing stores.

Supermarket Capacity

Table 4.23 and Table 4.24 demonstrate that there is expected to be potential to provide up to five additional supermarkets within the trade area, including **three supermarkets at West Appin centre at capacity**. This would include two full line major supermarkets (of around 4,000 sq.m) and a smaller supermarket (such as ALDI or IGA) of around 1,500 sq.m.

Table 4.23 demonstrates that there is capacity to support 17,800 sq.m supermarket floorspace at sustainable turnover rates at \$13,187 per sq.m. This includes provision of an existing supermarket (Appin Supa IGA) within the trade area.

Table 4.24 demonstrates that three supermarkets at West Appin town centre could be expected to achieve market shares ranging from 45% within the primary trade area to 25% in the secondary north and secondary east trade areas. This would equate to a sustainable rate of \$10,231 per sq.m. These shares, together with a small allowance for spend from beyond the trade area and general merchandise sales could support 9,500 sq.m of supermarket floorspace at sustainable productivity rates.

West Appin Total Spending Market

Current and On Completion (\$2016)

Table 4.20

Current (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	14	4	3	2	4	4	1	32
Secondary:								
North	2	1	0	0	0	0	0	4
West	6	2	1	1	2	2	0	14
Total Secondary	8	2	2	1	2	2	1	18
Total Trade Area	21	7	5	3	6	6	2	50

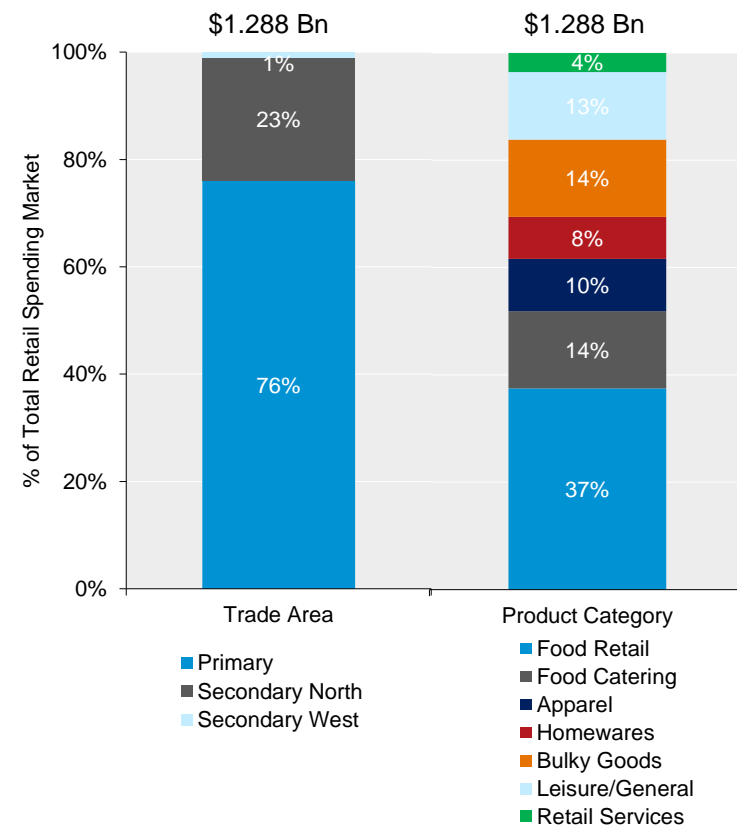
On Completion (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	367	141	96	77	141	123	35	980
Secondary:								
North	110	42	29	23	42	37	11	295
West	5	2	1	1	2	2	0	13
Total Secondary	115	44	30	24	44	39	11	308
Total Trade Area	482	185	126	101	185	162	46	1,288

Source: ABS; MarketInfo 2012; Urbis

Retail Spending Market Composition

On Completion

Chart 4.3



Source: ABS; MarketInfo 2012; Urbis

West Appin Trade Area DDS Capacity Assessment

At Capacity	Table 4.21
Trade Area DDS Spending	\$M
Primary	65.5
Secondary North	19.7
Secondary West	0.9
Total	86.1
Spend Retention by Trade Area DDSs	%
Primary	35%
Secondary North	25%
Secondary West	25%
Sub Total	28.1
Plus Turnover from Beyond	5%
Plus Food and Grocery	4%
Available Turnover to Trade Area DDSs	30.8
Indicative Trade Area DDSs	sq.m
West Appin TC DDS 1	7,000
Existing Trade Area DDS's	-
Total DDS Floorspace	7,000
Productivity - All DDSs (\$ per sq.m)	\$4,397

Source: Urbis

West Appin Town Centre DDS Market Share Assessment

At Capacity	Table 4.22
West Appin Town Centre Market Share	%
Primary	100%
Secondary North	100%
Secondary West	100%
Sub Total	28.1
Plus Turnover from Beyond	5%
Plus Food and Grocery	4%
Total Store(s) Potential	30.8
DDS Floorspace at West Appin Town Centre	
DDS 1	sq.m
Total Floorspace	sq.m
Productivity (indicative)	\$ per sq.m

Source: Urbis

West Appin Trade Area Capacity Assessment

At Capacity

Table 4.23

Trade Area Supermarket Spending		\$M
Primary		223.4
Secondary North		67.3
Secondary West		3.0
Total		293.7
Supermarkets		
	%	\$M
Primary	70%	156.4
Secondary North	50%	33.6
Secondary West	20%	0.6
Sub Total		190.7
Plus Turnover from Beyond	5%	10.0
Plus Take Home Liquor	5%	10.6
Plus General Merchandise	10%	23.5
Supermarkets		234.7
Indicative Trade Area Supermarkets		sq.m
West Appin TC Full Line Supermarket 1		4,000
West Appin TC Full Line Supermarket 2		4,000
West Appin TC Small Supermarket		1,500
Mt Gilead TC Full Line Supermarket		4,000
West Appin Environs Small Supermarket		2,800
Existing Trade Area Supermarkets		1,500
Total Supermarket Floorspace		17,800
Productivity - All Supermarkets (\$ per sq.m)		\$13,187

Source: Urbis

West Appin Supermarket Market Share Assessment

At Capacity

Table 4.24

West Appin Town Centre Market Share	%	\$M
Primary	45%	70.4
Secondary North	25%	8.4
Secondary West	25%	0.2
Sub Total		78.9
Plus Turnover from Beyond	5%	4.2
Plus Take Home Liquor	5%	4.4
Plus General Merchandise	10%	9.7
Total Store(s) Potential		97.2
Supermarket Floorspace at West Appin		
Supermarket 1	sq.m	4,000
Supermarket 2	sq.m	4,000
Supermarket 3	sq.m	1,500
Total Floorspace	sq.m	9,500
Productivity (indicative)	\$ per sq.m	\$10,231

Source: Urbis

Supportable Floorspace

Having established the capacity for anchor tenant floorspace at West Appin town centre, benchmark ratios between anchor tenants floorspace and other uses is used to derive the total amount of gross leasable area (GLA).

Table 4.25 demonstrates that around 32,600 sq.m retail and ancillary floorspace could be supported at West Appin town centre at capacity. This includes:

- 18,800 sq.m anchor and mini major floorspace
- 8,800 sq.m specialty retail
- 5,000 sq.m non retail floorspace which could include a mix of gym, medical, childcare, civic and office floorspace.

West Appin Indicative Floorspace Mix

At Capacity

Table 4.25

Anchor	sq.m
Discount Department Stores	7,000
Supermarkets	9,500
Total Anchor	16,500
Mini Majors ¹	2,300
Specialties	sq.m
Food Specialties	1,700
Non-Food Specialties	4,400
Retail Services	800
Non-Retail & Ancillary	4,500
Total Centre	30,200
External Tenancies	sq.m
Retail Specialties	1,900
Non-Retail Specialties	500
Total Floorspace	32,600
Floorspace Summary:	
Anchor and Mini Majors	18,800
Specialty Retail	8,800
Non-Retail	5,000
Total Floorspace	32,600

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Market Share Assessment

Table 4.26 shows indicative market shares by product group and trade area sector for the proposed West Appin town centre. This assumes turnover performance in line with current benchmark rates.

The table demonstrates that West Appin town centre can achieve a 17% market share of total spending within the primary trade area, and a 16% market share of total spending within the main trade area.

West Appin Town Centre

Indicative Market Shares by Product Group

Table 4.26

	Primary Trade Area	Main Trade Area
Food Retail	24%	21%
Food Catering	9%	8%
Apparel	24%	22%
Homewares	20%	19%
Leisure/ General	17%	15%
Retail Services	21%	18%
Total	17%	16%

Source: Urbis

4.4. BULKY GOODS RETAIL

Table 4.27 outlines the bulky goods spending market within the study area at capacity. The analysis assumes that 50% of total bulky goods spending available in the market (\$296 million) can be retained, leaving \$148 million of bulky goods spending available in the market. A small proportion of this spend will be directed towards existing and proposed centres (\$11 million), with the remainder to be retained by future standalone bulky goods precinct(s) within the study area (\$137 million).

The lower half of Table 4.27 shows around 27,400 sq.m bulky goods floorspace could be supported within the study area, based on adopting a target turnover rate of \$5,000 per sq.m.

Bulky Goods Spending Market

At Capacity	Table 4.27
	(\$M)
Resident Spending - Study Area	296
Leakage outside of Study Area	50%
	(\$M)
Retained Spending - Study Area	148
Of which:	(\$M)
Proposed and Existing Centres	11
Future Bulky Goods Precinct(s)	137
	(\$M)
Future Bulky Goods Precinct(s)	
Retained Spending - Study Area	137
	\$ per sq.m
Sustainable Productivity Rate	5,000
	sq.m
Supportable Floorspace	27,400

Source: Urbis

Chart 4.4 provides a contextual illustration of this quantum of floorspace compared to other bulky goods centres across metropolitan Sydney. If developed as a single centre, the chart illustrates that this would be one of the largest bulky goods centres in Sydney.

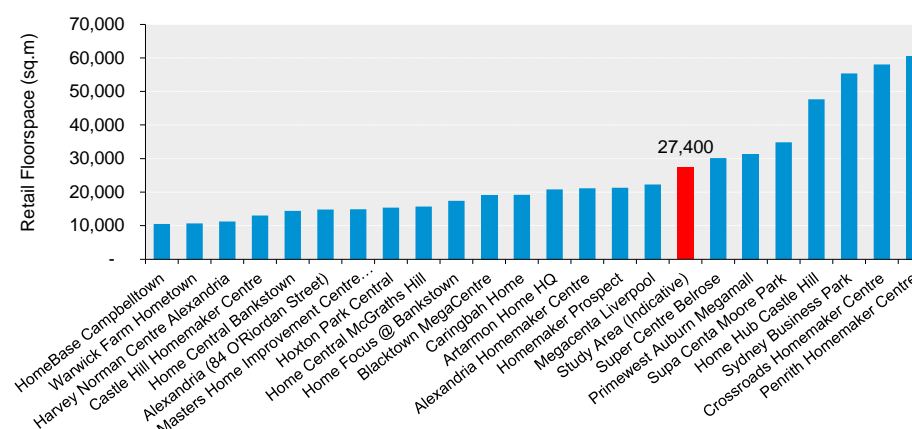
Given its peripheral location and broad distribution of centres and housing development, it is more likely in our view that bulky goods floorspace would be developed in a number of small locations.

As an example the quantum of space could equate to two Bunnings stores and a smaller homemaker centre.

Bulky Goods Floorspace Comparison

Metropolitan Sydney

Chart 4.4



Source : LFRA Directory 2016 ; Urbis

4.5. OVERALL CENTRE NETWORK CAPACITY

The market potential for a network of shopping centres across the study area has been considered. The DDS and supermarket capacity assessment tables in Sections 4.1 to 4.3 demonstrate the potential for **up to six** additional supermarkets in total in addition to those proposed at Wilton, Menangle Park and West Appin.

Having determined the market capacity for these additional supermarkets, benchmark ratios between anchor tenants floorspace has again been used to derive the total amount of gross leasable area (GLA).

The indicative centre network is summarised in Table 4.28 and Map 4.11, (following). **Appendix A** provides the indicative floorspace mix of each of the additional supermarket-based centres.

Top Down Checks

In order to provide a top down check of the market capacity to support the proposed centre network the following was undertaken:

- Benchmark productivity rates (turnover per sq.m) were assigned to the proposed network of centres, adopting an indicative centre mix that is also in line with current benchmarks.
- Analysis of **spend containment** within the study area was then undertaken. This step identifies the amount of spend that would be retained by these centres, and conversely the amount of study area resident spend that would be leaked to higher order centres beyond the study area.

Chart 4.5 shows the resultant spend containment within the study area resulting in the development of a network of nine centres and a bulky good precinct(s). The chart demonstrates that 44% of available study area spend would be contained and directed to the network of centres. Analysis of containment by product category demonstrates that:

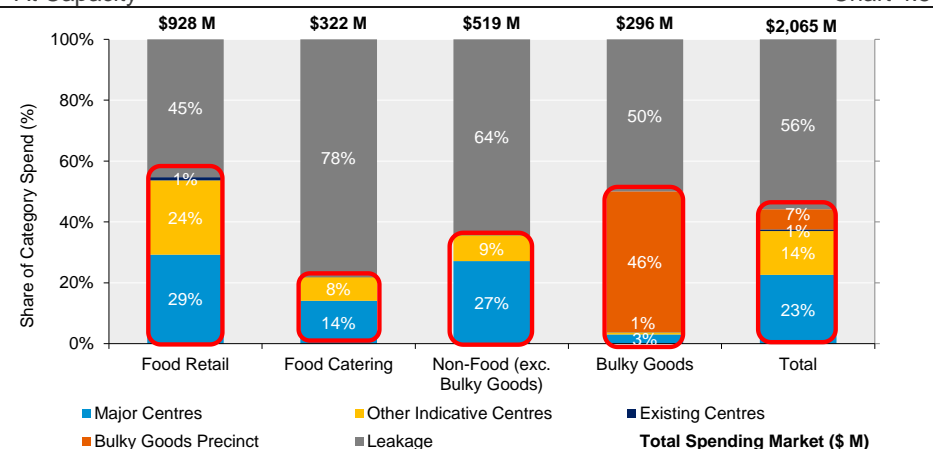
- 55% of food retail spend would be contained
- 22% of food catering would be contained

- 46% of discretionary spend would be retained
- 50% of bulky goods spending would be retained.

Study Area Spend Containment

At Capacity

Chart 4.5



These containment rates reflect the relative scale and positioning of the indicative centre network, having regard to the following factors:

- Higher order centres (for example Macarthur Square) which will attract a high proportion of discretionary spend
- Food retail expenditure leakage linked to on-line retail, food shopping whilst visiting higher order centres and whilst at work
- Food catering spending which tends to be dispersed across a wide range of cafes and restaurants and spent while at work

The containment rates appear reasonable in this context. Factors which could increase containment include:

- Centre tenancy mix which include a higher proportion of food retail and food catering floorspace, for example in external 'pad-site' locations

- Provision of markets and cultural events could increase containment of food retail and food catering expenditure
- Development of destinational food and beverage outlets or precincts outside of centres which could increase food catering retention. We note that the success of food and beverage retailing is highly operator dependant.
- Inclusion of food and beverage and service retail in any future employment precincts in the study area
- Development of additional strip retailing, such as local shops outside of the indicative centre network.

In relation the last point, we note that strip retail without anchor tenants tends to perform significantly lower than centres with a strong anchor. For this reason, our view is that any local strip retail should be limited in scale and should be co-located with other destinational uses (for example schools, leisure and recreation facilities) in order to maximise visitation.

Chart 4.6 provides a comparison of the proposed scale of centres at Wilton, Menangle Park and West Appin relative to existing shopping centres across Metropolitan Sydney.

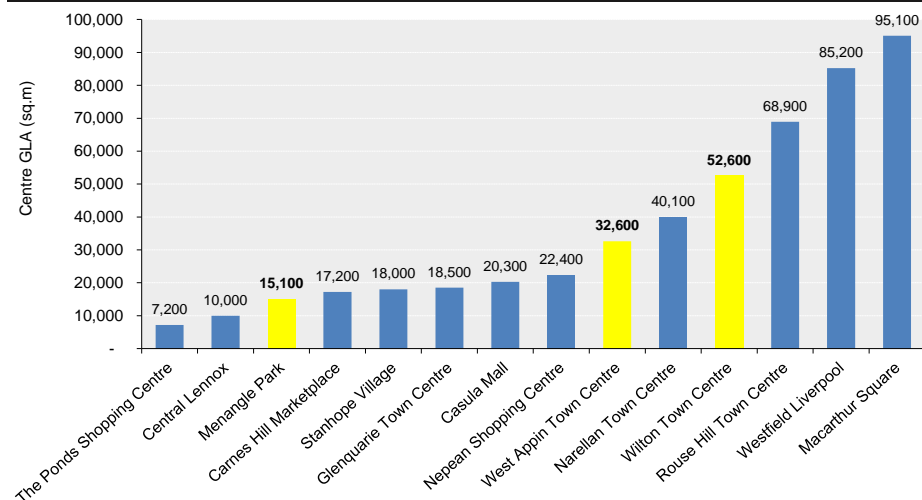
It demonstrates that:

- The scale of a future centre at Wilton would be comparable with the existing Rouse Hill Town Centre
- The proposed centre at West Appin would be 20% smaller than the existing Narellan Town Centre
- Menangle Park would be comparable in size to suburban centre such as Carnes Hill Marketplace and Stanhope Village
- Other supermarket-based centres within the network would, in the main, be comparable to a contemporary centre such as The Ponds.

Centre Size Comparison

Metropolitan Sydney

Chart 4.6



Source : PCA Shopping Centres Online 2016 ; Urbis

Centre Network Capacity

Greater Macarthur Priority Growth Area

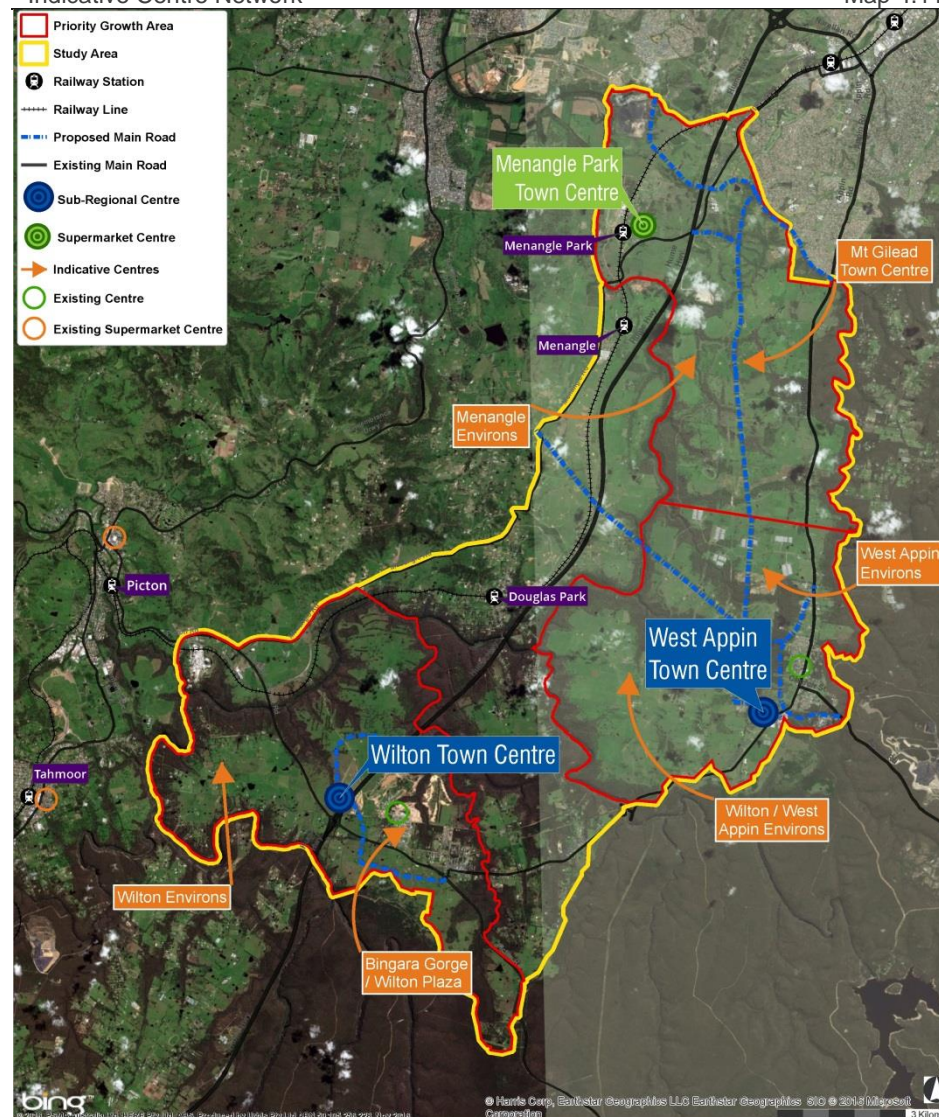
Table 4.28

			Anchor Tenants (No.)	Total Floorspace (sq.m)
Major Centres	Type	Anchors		
Wilton Town Centre	Sub-Regional	DDS	2	52,600
		Full Line Supermarket	2	
		Smaller Supermarket	1	
Menangle Park Town Centre	Supermarket	Full Line Supermarket	2	15,100
West Appin Town Centre	Sub-Regional	DDS	1	32,600
		Full Line Supermarket	2	
		Smaller Supermarket	1	
Other Centres				
Mt Gilead Town Centre	Supermarket	Full Line Supermarket	1	8,700
Centre A (Bingara Gorge / Wilton Plaza)*	Supermarket	Full Line Supermarket	1	8,700
Centre B (Wilton Environs)	Supermarket	Full Line Supermarket	1	6,100
Centre C (Wilton / West Appin Environs)	Supermarket	Full Line Supermarket	1	6,100
Centre D (Menangle Park Environs)	Supermarket	Smaller Supermarket	1	4,400
Centre E (West Appin Environs)	Supermarket	Full Line Supermarket	1	6,100
Total DDS			3	66,200
Total Supermarket			14	74,200
Total Centre			17	140,400
Bulky Goods	Standalone Precinct(s)			27,400
Total Floorspace				167,800

*Additional Floorspace

Indicative Centre Network

Map 4.11



5. TIMING OF DEVELOPMENT

The staging and delivery of new centres will be tied to the timing of dwelling completions and population growth within the development precincts in the study area.

Urbis benchmarking identifies the following population thresholds to support anchor tenants:

- 1 supermarket for 10,000 new primary trade area residents
- 1 DDS for 40,000 new main trade area residents

It is noted that speciality retail and non-retail floorspace is to be added with supermarket and DDS floorspace on a pro-rata basis.

Tables 5.1 to 5.3 provide an indicative delivery program for new retail centres within the study area. Timing is based on dwelling completion estimates provided by DPE.

Indicative staging may be summarised as follows:

- Wilton (Table 5.1):
 - Wilton town centre DDS 1 and full line supermarket 1 to open in 2025
 - Bingara Gorge supermarket to open in 2031
 - Wilton town centre DDS 2 and full line supermarket 2 to open in 2036
 - 2,800 sq.m Wilton environs supermarket to open in 2040
 - Wilton town centre smaller supermarket (1,500 sq.m) to open in 2046.
- Menangle Park (Table 5.2):
 - Menangle Park town centre full line supermarket 1 to open in 2023
 - Mount Gilead town centre full line supermarket to open in 2028
 - Menangle Park town centre full line supermarket 2 to open in 2033

- Menangle Park environs smaller supermarket (1,500 sq.m) to open in 2039.
- West Appin (Table 5.3):
 - West Appin town centre full line supermarket 1 to open in 2032
 - West Appin town centre DDS and full line supermarket 2 to open in 2046
 - West Appin environs supermarket to open in 2054
 - Wilton / West Appin environs supermarket to open in 2066
 - West Appin town centre smaller supermarket (1,500 sq.m) to open in 2078.

In practice, there may be instances where retail operators seek to open early in the development phase, in order to gain first-mover advantage, as well as to provide amenity and services for early residents. This in turn can assist in increasing the take-up rate of residential development within the land release precincts. In these instances, retailers may be willing to accept lower productivity rates in initial years, with the prospect of strong year on year growth.

Indicative Staging

Wilton

Table 5.1

Population	2016	2021	2025	2026	2031	2036	2040	2041	2046
Primary	3,283	5,243	10,423	12,103	20,503	31,703	40,383	42,343	51,303
Secondary South	16,949	18,061	19,398	19,748	21,372	22,697	22,697	22,697	22,697
Secondary West	6,323	6,842	7,129	7,203	8,430	9,948	9,948	9,948	9,948
Secondary North	845	829	823	821	817	818	818	818	818
Secondary East	2,638	2,638	3,478	4,318	9,265	14,398	18,318	19,158	23,358
Total	30,038	33,613	41,251	44,193	60,387	79,564	92,164	94,964	108,124

Retail (sq.m)	2016	2021	2025	2026	2031	2036	2040	2041	2046
Discount Department Store	0	0	7,000	7,000	7,000	14,000	14,000	14,000	14,000
Supermarket	0	0	4,000	4,000	8,000	12,000	14,800	14,800	16,300
Mini Majors and Retail Specialties	0	0	9,362	9,362	12,062	21,423	23,323	23,323	24,600
Ancillary and Non-Retail Floorspace	0	0	4,260	4,260	6,260	10,519	11,919	11,919	12,500
Total	0	0	24,621	24,621	33,321	57,943	64,043	64,043	67,400

Source: Urbis

Wilton Town Centre DDS 1
and full line supermarket 1

Bingara Gorge supermarket

Wilton Town Centre DDS 2
and full line supermarket 2

Wilton Environs
supermarket

Wilton Town Centre smaller
supermarket

Indicative Staging

Menangle Park

Table 5.2

Population	2016	2021	2023	2026	2028	2031	2033	2036	2039
Primary	1,440	6,280	10,199	16,917	21,778	27,109	30,658	35,981	40,713
Secondary North West	636	702	787	933	1,009	1,136	1,211	1,332	1,332
Secondary North	11,420	11,978	11,920	11,833	11,849	11,873	11,836	11,781	11,781
Secondary East	24,234	25,125	25,807	26,866	28,028	29,867	30,197	30,699	30,699
Secondary South	2,638	2,638	2,638	4,318	6,185	9,265	11,318	14,398	17,478
Secondary West	845	829	826	821	819	817	817	818	818
Total	41,213	47,552	52,176	61,688	69,669	80,067	86,037	95,009	102,821

Retail (sq.m)	2016	2021	2023	2026	2028	2031	2033	2036	2039
Discount Department Store	0	0	0	0	0	0	0	0	0
Supermarket	0	0	3,200	3,200	7,200	7,200	10,400	10,400	11,900
Mini Majors and Retail Specialties	0	0	2,950	2,950	5,650	5,650	8,600	8,600	10,500
Ancillary and Non-Retail Floorspace	0	0	1,400	1,400	3,400	3,400	4,800	4,800	5,800
Total	0	0	7,550	7,550	16,250	16,250	23,800	23,800	28,200

Source: Urbis

Menangle park Town Centre
full line supermarket 1

Mount Gilead Town Centre
supermarket

Menangle Park Town
Centre full line
supermarket 2

Menangle Park Environs smaller
supermarket

Indicative Staging

West Appin

Table 5.3

Population	2031	2032	2036	2041	2043	2046	2051	2054	2056	2061	2066	2071	2076	2078
Primary	9,265	10,291	14,398	19,158	20,838	23,358	27,558	30,078	31,758	35,958	40,158	44,358	48,558	50,238
Secondary North	7,251	8,688	14,438	18,330	18,330	18,330	18,330	18,330	18,330	18,330	18,330	18,330	18,330	18,330
Secondary West	817	817	818	818	818	818	818	818	818	818	818	818	818	818
Total	17,333	19,797	29,654	38,306	39,986	42,506	46,706	49,226	50,906	55,106	59,306	63,506	67,706	69,386
Retail (sq.m)	2031	2032	2036	2041	2043	2046	2051	2054	2056	2061	2066	2071	2076	2078
Discount Department Store	0	0	0	0	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000
Supermarket	0	4,000	4,000	4,000	8,000	8,000	8,000	10,800	10,800	10,800	13,600	13,600	13,600	15,100
Mini Majors and Retail Specialties	0	2,667	2,667	2,667	10,000	10,000	10,000	11,900	11,900	11,900	13,800	13,800	13,800	14,800
Ancillary and Non-Retail Floorspace	0	1,236	1,236	1,236	4,636	4,636	4,636	6,036	6,036	6,036	7,436	7,436	7,436	7,900
Total	0	7,903	7,903	7,903	29,636	29,636	29,636	35,736	35,736	35,736	41,836	41,836	41,836	44,800

Source: Urbis

West Appin Town Centre
full line supermarket 1

West Appin Town Centre
DDS and full line
supermarket 2

West Appin Environs
supermarket

Wilton/West Appin Environs
supermarket

West Appin Town Centre
smaller supermarket

6. ECONOMIC BENEFITS

6.1. EMPLOYMENT

Table 6.1 demonstrates that the proposed centre network has the potential to generate around 6,500 direct jobs. This would include a mix of full time, part time and temporary employment providing opportunities for a broad cross section of the future population. Table 6.1 provides a summary of employment by land use, drawing on industry benchmarks¹

Ongoing Retail Employment Generation

At Capacity

Table 6.1

Type of Use	Employment Per '000 Sq.m	Proposed Centres	
	Industry Average	GLA (sq.m)	Employment (Persons)
DDS(s)	23.5	21,000	500
Supermarket(s)	40.8	43,300	1,800
Mini-Majors	23.5	12,000	300
Specialty Shops	60.7	38,100	2,300
Non-Retail/External Shops	42.7	26,000	1,100
Total (ex Bulky Goods)		140,400	6,000
Bulky Goods Precinct(s)	17.5	27,400	500
Total Study Area		167,800	6,500

1. Takes into account reduced vacancies

2. Includes non-retail and external components. Excludes additional management, cleaning & security staff

Source : Urbis

This excludes an additional employment which may be generated through setting up any business parks, employment zones or the like outside of these centres.

6.2. CONSUMER BENEFITS

Proposed retail development in the study area will have a number of benefits for consumers. In particular:

- Local residents have a wider range of facilities, conveniently located with enhanced parking and access arrangements
- The extension of choice will promote competition, with possible benefits in terms of keener prices and better quality
- Ancillary non-retail uses (e.g. gym, medical centre, childcare centre and professional services) can contribute to well-being within the community and broaden the range of activities provided within the study area
- Proposed retail centres across the study area will reduce the need for future study area residents to travel further afield to make essential shopping purchases, which will result in lower travel cost and time savings.

¹ ABS 1998-99 retail industry publication (8622.0), NSW Department of Planning Employment Monitoring of Commercial and Industrial Areas, Urbis

APPENDIX A

SUPERMARKET CENTRES

RESIDUAL

Wilton

Bingara Gorge / Wilton Plaza Supermarket Indicative Floorspace

Mix

At Capacity

Table A.2

Majors	sq.m
Supermarkets	4,000
Mini Majors ¹	700
Specialties	sq.m
Food Specialties	900
Non-Food Specialties	800
Retail Services	300
Non-Retail & Ancillary	2,000
Total Centre	8,700
External Tenancies	sq.m
Retail Specialties	0
Non-Retail Specialties	0
Total Floorspace	8,700

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Wilton Environs Supermarket Indicative Floorspace Mix

At Capacity

Table A.3

Majors	sq.m
Supermarkets	2,800
Mini Majors ¹	500
Specialties	sq.m
Food Specialties	600
Non-Food Specialties	600
Retail Services	200
Non-Retail & Ancillary	1,400
Total Centre	6,100
External Tenancies	sq.m
Retail Specialties	0
Non-Retail Specialties	0
Total Floorspace	6,100

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Menangle Park

Mount Gilead Town Centre Indicative Floorspace Mix

At Capacity		Table A.4
Majors	sq.m	
Supermarkets	4,000	
Mini Majors ¹	700	
Specialties	sq.m	
Food Specialties	900	
Non-Food Specialties	800	
Retail Services	300	
Non-Retail & Ancillary	2,000	
Total Centre	8,700	
External Tenancies	sq.m	
Retail Specialties	0	
Non-Retail Specialties	0	
Total Floorspace	8,700	

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

Menangle Park Environs Supermarket Indicative Floorspace Mix

At Capacity		Table A.5
Majors	sq.m	
Supermarkets	1,500	
Mini Majors ¹	300	
Specialties	sq.m	
Food Specialties	300	
Non-Food Specialties	300	
Retail Services	100	
Non-Retail & Ancillary	800	
Total Centre	3,300	
External Tenancies	sq.m	
Retail Specialties	900	
Non-Retail Specialties	200	
Total Floorspace	4,400	

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

West Appin

Wilton / West Appin Environs Supermarket Indicative Floorspace

Mix

At Capacity

Table A.6

Majors	sq.m
Supermarkets	2,800
Mini Majors ¹	500
Specialties	sq.m
Food Specialties	600
Non-Food Specialties	600
Retail Services	200
Non-Retail & Ancillary	1,400
Total Centre	6,100
External Tenancies	sq.m
Retail Specialties	0
Non-Retail Specialties	0
Total Floorspace	6,100

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis

West Appin Environs Supermarket Indicative Floorspace Mix

At Capacity

Table A.7

Majors	sq.m
Supermarkets	2,800
Mini Majors ¹	500
Specialties	sq.m
Food Specialties	600
Non-Food Specialties	600
Retail Services	200
Non-Retail & Ancillary	1,400
Total Centre	6,100
External Tenancies	sq.m
Retail Specialties	0
Non-Retail Specialties	0
Total Floorspace	6,100

1. Mini Majors include tenants with GLA > 400 sq.m

Source: Urbis



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