Clemton Park Village Centre, New South Wales

Economic Impact Assessment

Prepared for Australand

21st November 2012

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INTRODUCTION

This report presents an independent assessment of the demand and market scope for Clemton Park Village Centre in Inner South-west Sydney.

The centre currently has concept plan approval for 6,985 sq.m of floorspace. This report assesses the demand for an additional 405 sq.m of floorspace at the centre, which will enable a larger supermarket of 3,800 sq.m to be developed on the site.

The report is structured and presented in **four sections** as follows:

- **Section 1** details the location of the proposed Clemton Park Village Centre and provides a review of the planned development scheme.
- **Section 2** details the trade area likely to be served by Clemton Park Village Centre, including current and projected population and retail spending levels over the period to 2026. A summary of the socio-economic profile of the trade area population by sector is also provided.
- **Section 3** summaries the competitive environment, including current and future developments.
- **Section 4** outlines our assessment of the sales potential for the proposed additional floorspace (including a larger supermarket) at Clemton Park Village Centre and the likely trading impacts on other retailers. Other economic benefits are also detailed.

EXECUTIVE SUMMARY

The key points of this report, regarding the demand and market scope for the proposed additional 405 sq.m of floorspace at Clemton Park Village Centre, include:

i. Clemton Park Village is a new residential community currently under construction in Inner Western Sydney.

ii. The proposed Clemton Park Village development provides a range of residential and employment uses on the former Sunbeam site. Overall, the development will include 675 apartments as well as 100 seniors living/aged care units, resulting in a population of around 1,000 – 1,500 persons.

iii. The retail centre at Clemton Park Village, referred to as Clemton Park Village Centre throughout this report, will be completed as part of Stage Three (Lot 42) of the development and located on the north-east corner of Charlotte Street and Harp Street.

iv. The approved concept plan (February 2010) for Clemton Park Village allows for a retail centre of 6,985 sq.m to be developed at the site, including a supermarket of 2,585 sq.m. Australand are now proposing a slightly larger retail development than approved for on the approved concept plan. Overall, the centre will be some 405 sq.m larger, at 7,390 sq.m and include a supermarket of 3,800 sq.m.

v. It is important to note that this report is prepared using the Gross Lettable Area (GLA) schedule for the proposed development, as it standard in economic impact assessments. The Gross Floor Area (GFA) includes retail malls and amenities, which are excluded from the GLA. Therefore, the overall GFA of the development would be higher than the overall GLA indicated in this report.

vi. The main trade area for the proposed Clemton Park Village Centre includes around 83,360 residents and is projected to increase to 90,730 residents by 2026. A large Asian-born family market resides within the trade area.

vii. There are currently no major full-line supermarkets (i.e. supermarkets 3,000 sq.m or greater) located within the Clemton Park Village Centre main trade area. This is reflected in the low provision of supermarket floorspace provided throughout the main trade area being 100 sq.m per 1,000 persons, as compared with the Sydney and Australian benchmarks of 249 sq.m and 312 sq.m respectively.

viii. Even with the opening of full-line supermarkets at Clemton Park and Campsie Civic Centre, the provision of supermarket floorspace will still be lower than the Sydney and Australian benchmarks in 2017/18 (the assumed opening year of Campsie Civic Centre) at 187 sq.m per 1,000 persons.

ix. The additional 405 sq.m of retail floorspace proposed at Clemton Park Village Centre is projected to record some $8.6 million in additional sales in 2016 (or a 15.4% increase). This can be compared with retail spending growth in the main trade area over the next four years of some $56.4 million, meaning that the additional 405 sq.m of floorspace will only take some 15.3% of additional spending growth in the market with all the other growth available to other retailers.

x. The largest impact in dollar terms is likely to occur on the Campsie Town Centre. However, even this impact is insignificant in economic terms, at 2.3%, with Campsie Town Centre still comprising over 150 retailers and the Woolworths supermarket understood to trade at very high levels. This supermarket will remain viable and anchor other specialty stores within the region.

xi. All other impacts on competing centres from the proposed Clemton Park Village Centre development will be small, with the majority less 2% ($1 million or less) and well within normal competitive bounds.

xii. On the other hand, the proposed Clemton Park development will provide a high level of convenience for immediate and surrounding residents, additional jobs, as well as provide a major full-line supermarket in an area currently under supplied by supermarket floorspace.

xiii. It is concluded that the combination of the substantial positive economic impacts serve to more than offset the limited trading impacts that can be anticipated from the small proposed expansion of the Clemton Park Village Centre approved scheme. Further, the impacts from the amended proposal would not threaten the viability of any retailers or centres throughout the surrounding area or limit the future of planned/proposed centres including, the Campsie Civic Centre proposal.

1 SITE LOCATION AND PROPOSED DEVELOPMENT

i. Clemton Park Village is a new residential community currently under construction on the former Sunbeam site, which borders the suburbs of Clemton Park and Campsie. Clemton Park and Campsie are situated within Inner Western Sydney, approximately 14 km south-west of the Sydney Central Business District (CBD) (refer Map 1.1).

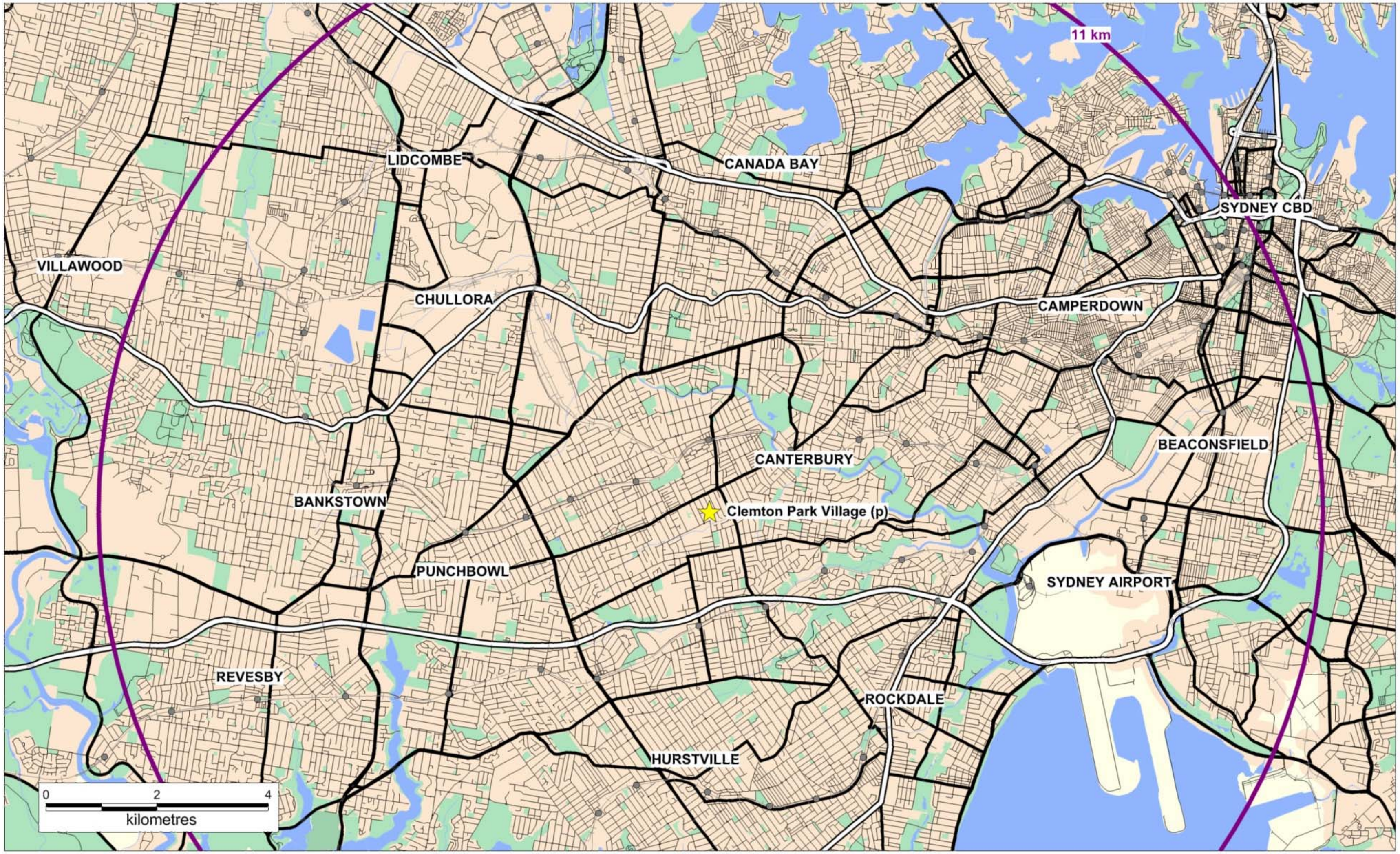
ii. On completion, Clemton Park Village will include 675 apartments as well as 100 seniors living/aged care units, resulting in an on-site population of around 1,000 – 1,500 persons. The new community will be located in the block bounded by Troy Lane to the north, Hart Street to the south-west and Charlotte Street to the west (Map 1.2).

iii. The site is easy to access by both private and public transport, being situated within 250 metres of Canterbury Road. Canterbury Road connects to Bexley Road in the east and Kingsgrove Road in the west, with both of these roads providing access onto the M5 Motorway to the south. Additionally, the site is well serviced by public transport, given the number of bus services operating within close proximity of the site.

iv. Other major community and commercial facilities surrounding the site are shown on Map 1.2, with key points to note including:

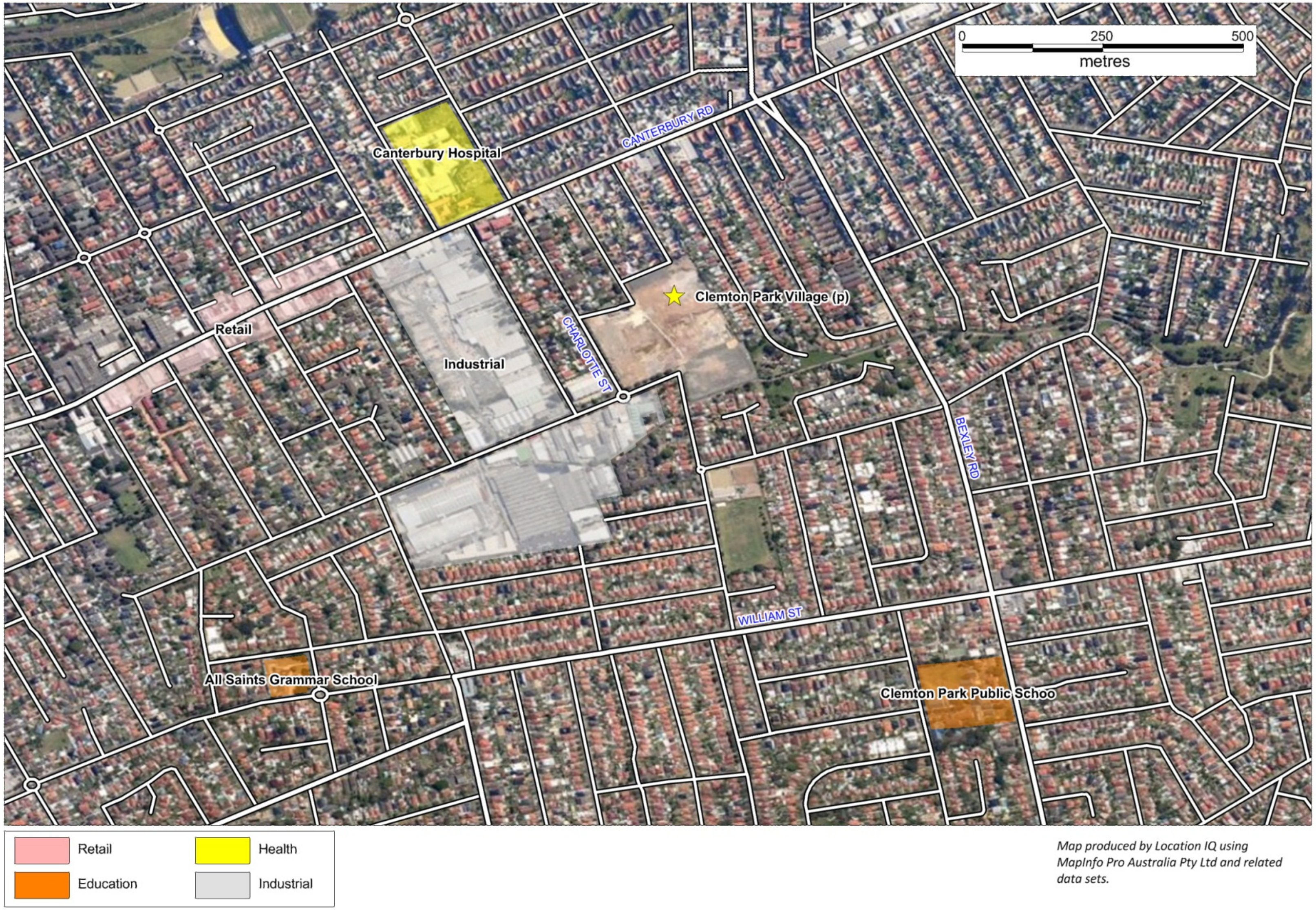
- Canterbury Hospital is located directly north of Canterbury Road, 600 metres to the north of the site.
- A small retail provision is provided along Canterbury Road to the north-east. Primarily bulky and industrial related facilities are provided along this road.
- A number of educational institutions are located within close proximity to the site, including Clemton Park Public School, Kingsgrove North High School, Harcourt Public School and Belmore North Public School.

MAP 1.1 – CLEMTON PARK VILLAGE REGIONAL CONTEXT



Map produced by Location IQ using MapInfo Pro Australia Pty Ltd and related data sets.

MAP 1.2 – CLEMTON PARK VILLAGE LOCAL CONTEXT



Map produced by Location IQ using MapInfo Pro Australia Pty Ltd and related data sets.

v. The retail centre at Clemton Park Village, referred to as Clemton Park Village Centre throughout this report, will be completed as part of Stage Three of the development and located on the north-east corner of Charlotte Street and Harp Street.

vi. The approved concept plan for Clemton Park Village allows for a retail centre of 6,985 sq.m to be developed at the site, including:

– A supermarket of 2,585 sq.m

– 4,400 sq.m of retail floorspace

vii. According to the Urbis Averages 2011/12, a single supermarket can support around 1,443 sq.m of specialty being 15 – 16 shops. The approved concept plan allows for 4,400 sq.m of retail floorspace, or more than 40 retail specialty shops, to be developed at the centre.

viii. A provision of 40 retail specialty shops would not be supportable at the proposed centre, particularly given a supermarket of only 2,585 sq.m was envisaged on the site. Typically single supermarket based shopping centres that provide a provision of 15 -16 shops are anchored by major full-line supermarkets of 3,500 sq.m. As such, it was envisaged that the planned 4,400 sq.m of retail floorspace would include a mini-major tenant of around 1,500 sq.m and some 2,900 sq.m specialty floorspace.

ix. It is also important to note that the *Clemton Park Review of Retail Demand and Economic Impact* report prepared by Hill PDA for the NSW Department of Planning, indicated the Clemton Park Village Centre site should ideally contain *"a range of 10-25 specialties including a chemist and newsagent."* This also suggests a provision of 40 specialty shops would not be supportable at the site and therefore a mini-major trader would need to be included in order to fill the approved 4,400 sq.m of retail floorspace.

x. Australand are now proposing a slightly larger retail development than approved on the concept plan. Table 1.1 outlines the components of new development scheme. Overall, the centre will be some 405 sq.m larger, at 7,390 sq.m, and include:

- A supermarket of 3,800 sq.m or an additional 1,215 sq.m of supermarket floorspace.
- A mini-major tenant (as envisaged in the concept plan approval)
- An 810 sq.m reduction in retail specialty floorspace to 2,090 sq.m or 18 – 23 shops.

xi. The provision of specialty shops at around 20 stores is more sustainable than the previous 30 stores envisaged under the approved Clemton Park concept plan.

xii. The plans for the proposed development are illustrated in Figures 1.1 and 1.2. As illustrated, the supermarket is planned to occupy the eastern end of the site. A specialty mall, accessible from Charlotte Street, is proposed to be created to the west of the larger supermarket with the mini-major tenant occupying the western end of the site. Basement level car parking is proposed, with access provided off Harp Street.

xiii. It is important to note that this report is prepared using the Gross Lettable Area (GLA) schedule for the proposed development, as it standard in economic impact assessments. The Gross Floor Area (GFA) includes retail malls and amenities, which are excluded from the GLA. Therefore, the overall GFA of the development would be higher than the overall GLA indicated in this report.

TABLE 1.1 – CLEMTON PARK VILLAGE CENTRE PROPOSED DEVELOPMENT

Tenant	Concept Plan Approval (sq.m)	Concept Plan Approval % of Total	Proposed Centre (sq.m)	Proposed Centre % of Total	Additional (sq.m)
Majors					
Supermarket	2,585	37.0%	3,800	51.4%	1,215
Total Majors	2,585	37.0%	3,800	51.4%	1,215
Mini-Major	1,500	21.5%	1,500	20.3%	0
Specialty Shop	2,900	41.5%	2,090	28.3%	-810
Total Retail	**6,985**	**100.0%**	**7,390**	**100.0%**	**405**

Source: Australand

FIGURE 1.1 – CLEMTON PARK VILLAGE CENTRE LAYOUT (GROUND LEVEL)

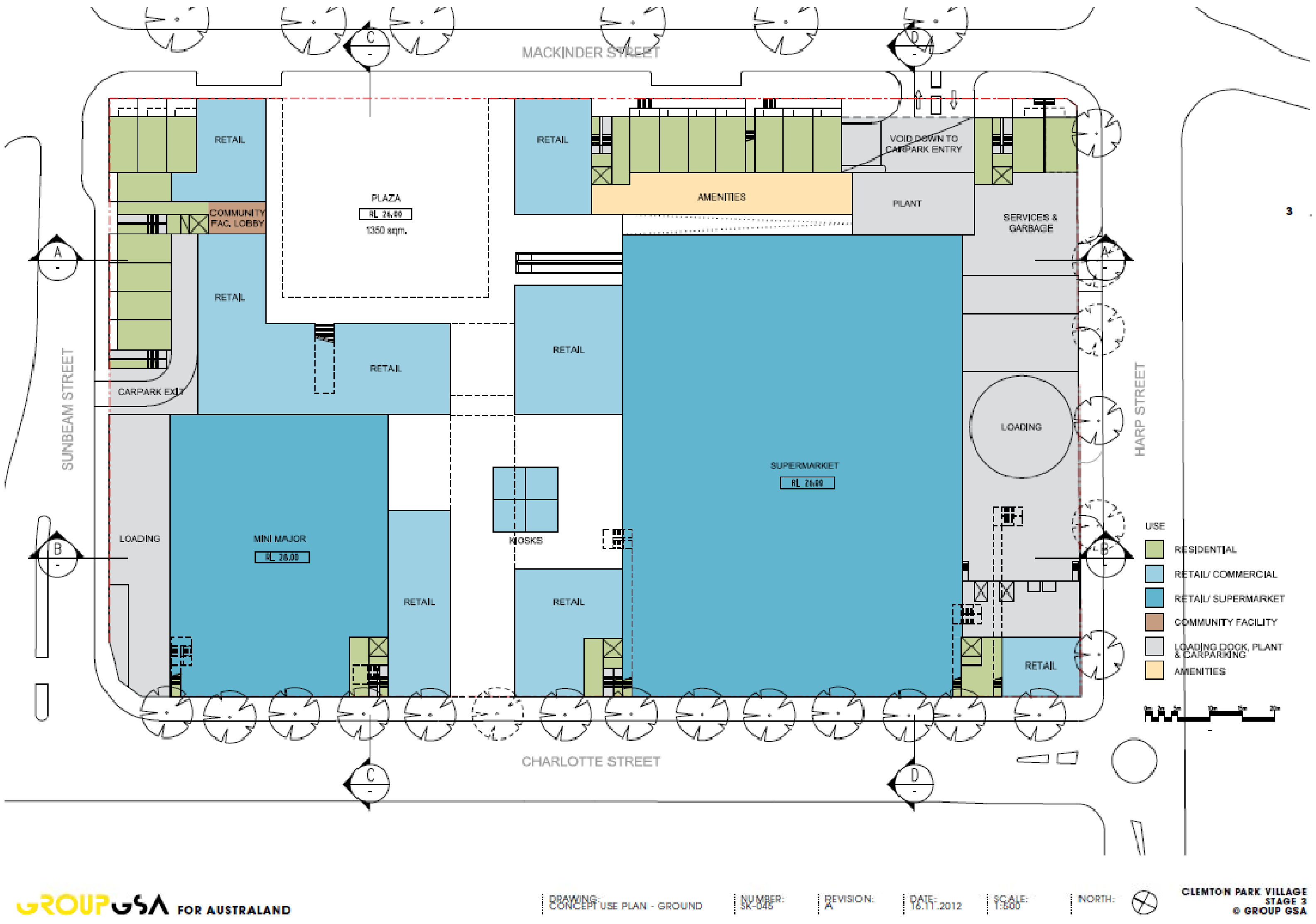
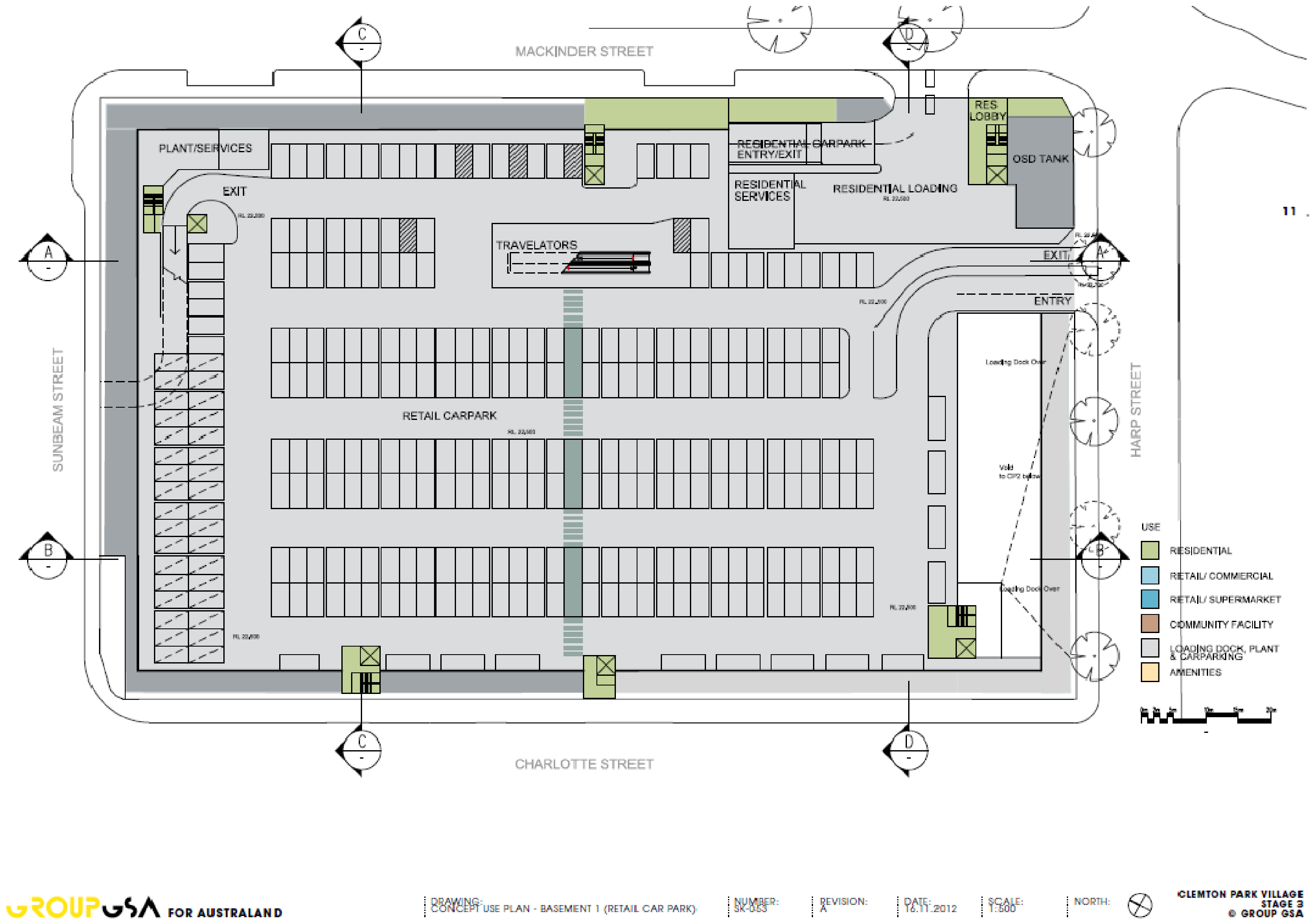


FIGURE 1.2 – CLEMTON PARK VILLAGE CENTRE LAYOUT (BASEMENT 1 LEVEL)



2 TRADE AREA ANALYSIS

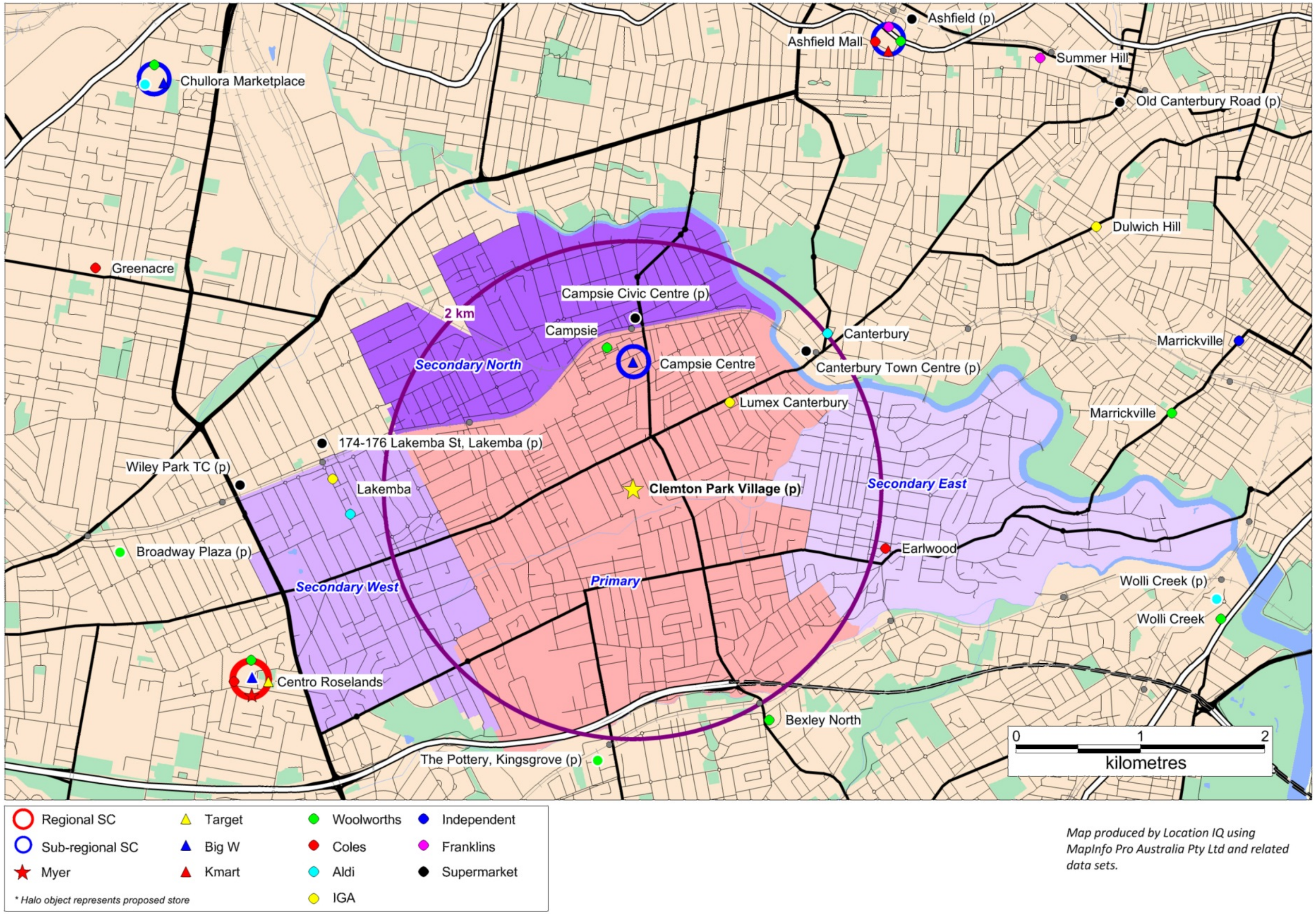
i. The trade area for the proposed Clemton Park Village Centre has been defined taking into consideration the following key factors:

- The scale and composition of the proposed development, which will include a supermarket as the anchor tenant.
- The provision of retail facilities throughout the region.
- Regional and local accessibility.
- The pattern of urban development.
- Significant physical barriers.

ii. Map 2.1 highlights the main trade area for the proposed Clemton Park Village Centre, which is defined to include a primary and three secondary sectors as follows:

- The **primary sector** extends approximately 1 – 1.5 km around the Clemton Park site and is limited to the north by the Sydenham-Bankstown railway line and to the south by the M5 Motorway. This sector encompasses the suburb of Clemton Park and also includes parts of Belmore, Campsie, Canterbury, Earlwood and Kingsgrove.
- The **secondary north sector** comprises parts of Campsie, Belfield and Belmore and is restricted to the north by the Cooks River.
- The **secondary east sector** is surrounded by the Cooks River to the north, east and south and contains the majority of the suburb of Earlwood.
- The **secondary west sector** encompasses parts of Wiley Park, Lakemba, Roselands and Kingsgrove. This sector is generally limited to the north by the Sydenham-Bankstown railway line, to the south by Moorefield Road and to the west by King Georges Road.

MAP 2.1 – CLEMTON PARK VILLAGE CENTRE MAIN TRADE AREA & COMPETITION



Map produced by Location IQ using MapInfo Pro Australia Pty Ltd and related data sets.

iii. The combination of the primary sector and secondary sectors are referred to throughout the remainder of this report as the main trade area. The defined trade area for the centre extends no more than 2 – 3 km around the site, which is typical of supermarket based centres.

iv. It is relevant to note that the trade area for the proposed centre does not change whether the approved concept scheme or the proposed scheme is developed. The extent of the trade area served by a supermarket based centre anchored by a supermarket of 3,800 sq.m would be identical to the trade area served by the approved supermarket of 2,585 sq.m. The only difference is the new larger supermarket scheme (i.e. 3,800 sq.m) would achieve slightly higher market shares (i.e. proportion of the resident's spending market) than the approved supermarket scheme of 2,585 sq.m, given the larger supermarket's ability to better serve the weekly shopping needs of local residents.

v. Table 2.1 details the current and projected main trade area population levels by sector. At the time of the 2011 Census, the Clemton Park Village Centre main trade area population was 83,360, including 33,920 persons within the primary sector. This represents an increase of 1.0% per annum since the 2006 Census of Population and Housing.

vi. Clemton Park Village (subject of this report) is the largest residential development planned within the main trade area. As discussed in Section 1, the development is proposed to include 675 apartments released over four stages. Additionally, a 100 unit seniors living/aged care facility will be provided as part of Stage Five. Clearing of the site has already underway, with the first residents expected to move in by the end of this year (i.e. 2012). Completion of the development is expected to take around five to six years.

vii. Other major residential developments assumed to occur within the Clemton Park Village Centre main trade area include:

- A development application for a six storey mixed-use development on the corner of Beamish Street and Unara Street has been submitted to Canterbury Council. If approved, the development would result in the addition of 104 residential units and around 244 sq.m of commercial floorspace to the primary sector. For the purposes of this report, the development is assumed to proceed by 2013/14.

- Fernside Developments have recently withdrawn a development application for 80 residential units along Canterbury Road in Campsie (primary sector). The developers are awaiting the release of the Canterbury Council Masterplan before proceeding.

viii. Additionally, a major redevelopment of the Town Hall in Campsie is proposed in the secondary north sector. The redevelopment, which is currently being referred to as the Campsie Civic Centre, is located in the block bounded by Shakespeare Street to the east, Clissold Parade to the south and Beamish Street to the west. The Masterplan for Campsie Civic Centre, adopted in May 2009, indicates the potential to provide around 36,240 sq.m of residential floorspace on the site. Timing for the development is uncertain, but it is unlikely the development will proceed in the short term. For the purposes of this report, the development of Campsie Civic Centre is not assumed to proceed until 2017/18.

ix. Based on the assumptions outlined above, the proposed Clemton Park Village Centre main trade area is projected to contain around 90,730 residents by 2026, including 36,920 within the primary sector. This represents an average growth rate of around 0.6%, or 530 persons per annum, over the forecast period. Total population growth of over 7,000 persons in the next 15 years is almost enough to support another full-line supermarket, with 8,000 persons typically required to support one major full-line supermarket (i.e. 3,000 sq.m or greater).

x. Table 2.2 summarises the socio-economic characteristics of the main trade area population compared with the Sydney metropolitan benchmarks. This information is based on the 2011 Census of Population and Housing. Key information includes:

- Average household incomes are generally lower than the Sydney metropolitan average across all sectors.

- The average household size is in-line with the benchmark, at 2.8 persons per household.

- The average age varies across the sectors, ranging from 34.5 years in the secondary west sector to 40.6 years in the secondary east sector.

- There are relatively low levels of home ownership across all sectors with the exception of the secondary east sector.

- The area generally contains a large Asian born population, particularly in the secondary north sector (36.7% Asian born).

- The household composition of the area is in-line with the Sydney metropolitan benchmark, with families the predominant group. It is important to provide families with an adequate provision of easy to access supermarket facilities within close proximity to their homes, particularly given the time poor lifestyles of today's modern family (i.e. two working parent households).

xi. Table 2.3 outlines the total retail expenditure generated by the main trade area population based on information sourced from Market Data Systems (MDS), known as MarketInfo.

xii. The Clemton Park Village Centre main trade area retail spending market is currently estimated at $899.8 million. This level is projected to increase at an average annual rate of around 1.3% to $1.08 billion by 2026. All figures presented in this report are in constant 2012 dollars and including GST.

xiii. Table 2.4 details the main trade area retail expenditure by key commodity group, indicating the largest spending market is food and grocery at $414.3 million, representing 46.0% of the total retail spending market.

TABLE 2.1 – MAIN TRADE AREA POPULATION, 2006 – 2026

Trade Area Sector	**Estimated Resident Population** 2006	2011	2013	**Forecast Population** 2016	2021	2026
Primary Sector	32,500	33,920	34,520	35,420	36,420	36,920
Secondary Sectors						
• North	18,270	19,620	20,040	20,670	21,670	22,670
• East	13,120	13,220	13,260	13,320	13,370	13,420
• West	15,340	16,600	16,920	17,220	17,470	17,720
Total Secondary	46,730	49,440	50,220	51,210	52,510	53,810
Main Trade Area	**79,230**	**83,360**	**84,740**	**86,630**	**88,930**	**90,730**

	Average Annual Change (No.) 2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Primary Sector	284	300	300	200	100
Secondary Sectors					
• North	270	210	210	200	200
• East	20	20	20	10	10
• West	252	160	100	50	50
Total Secondary	542	390	330	260	260
Main Trade Area	**826**	**690**	**630**	**460**	**360**

	Average Annual Change (%) 2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Primary Sector	0.9%	0.9%	0.9%	0.6%	0.3%
Secondary Sectors					
• North	1.4%	1.1%	1.0%	0.9%	0.9%
• East	0.2%	0.2%	0.2%	0.1%	0.1%
• West	1.6%	1.0%	0.6%	0.3%	0.3%
Total Secondary	1.1%	0.8%	0.7%	0.5%	0.5%
Main Trade Area	**1.0%**	**0.8%**	**0.7%**	**0.5%**	**0.4%**
Syd Metro Average	*1.2%*	*1.2%*	*1.2%*	*1.2%*	*1.1%*
Australian Average	*1.5%*	*1.5%*	*1.4%*	*1.3%*	*1.2%*

All figures as at June
All figures are based on 2011 SA1 boundary definition with the exception of 2006 which is based on 2006 CCD boundary definition. 2006 & 2011 ERP is calculated using 2011 enumeration factor.
Sources : ABS; NSW Department of Planning

TABLE 2.2 – MAIN TRADE AREA SOCIO-ECONOMIC PROFILE, 2011 CENSUS

Characteristics	Primary Sector	Secondary Sectors North	East	West	Main TA	Syd Metro Average
Average Per Capita Income	$27,315	$24,208	$34,230	$23,509	$26,922	$36,941
Per Capita Income Variation	-26.1%	-34.5%	-7.3%	-36.4%	-27.1%	n.a.
Average Household Income	$76,407	$69,013	$96,161	$69,508	$76,426	$99,586
Household Income Variation	-23.3%	-30.7%	-3.4%	-30.2%	-23.3%	n.a.
Average Household Size	2.8	2.9	2.8	3.0	2.8	2.7
Age Distribution (% of Pop'n)						
Aged 0-14	17.9%	17.8%	18.1%	23.4%	19.0%	19.2%
Aged 15-19	5.6%	5.7%	5.3%	6.0%	5.6%	6.3%
Aged 20-29	14.9%	16.6%	10.8%	14.8%	14.6%	14.7%
Aged 30-39	14.8%	15.8%	14.0%	16.9%	15.3%	15.3%
Aged 40-49	14.9%	14.6%	15.3%	13.4%	14.6%	14.2%
Aged 50-59	12.1%	12.2%	12.7%	9.9%	11.8%	12.3%
Aged 60+	19.8%	17.2%	23.8%	15.6%	19.0%	18.0%
Average Age	38.4	37.1	40.6	34.5	37.7	37.2
Housing Status (% of H'holds)						
Owner/Purchaser	63.5%	58.5%	79.3%	60.5%	64.2%	67.4%
Renter	36.5%	41.5%	20.7%	39.5%	35.8%	32.6%
Birthplace (% of Pop'n)						
Australian Born	47.3%	37.2%	61.3%	48.6%	47.4%	63.7%
Overseas Born	52.7%	62.8%	38.7%	51.4%	52.6%	36.3%
• Asia	23.7%	36.7%	9.1%	13.9%	22.5%	13.7%
• Europe	10.8%	6.9%	15.9%	7.8%	10.1%	9.1%
• Other	18.2%	19.1%	13.7%	29.7%	20.0%	13.6%
Family Type (% of Pop'n)						
Couple with dep't children	45.2%	45.8%	47.4%	54.5%	47.5%	48.2%
Couple with non-dep't child.	13.3%	10.6%	13.5%	9.1%	11.8%	9.1%
Couple without children	18.9%	19.5%	19.6%	15.0%	18.4%	20.1%
Single with dep't child.	8.5%	9.9%	6.6%	8.5%	8.5%	8.5%
Single with non-dep't child.	5.0%	5.0%	5.0%	4.2%	4.8%	3.9%
Other family	1.6%	1.7%	0.9%	1.4%	1.5%	1.2%
Lone person	7.6%	7.5%	7.0%	7.4%	7.4%	9.0%

Sources : ABS Census of Population and Housing 2011

TABLE 2.3 – MAIN TRADE AREA TOTAL RETAIL EXPENDITURE

Y/E June	Primary Sector	Secondary Sectors North	East	West	Main TA
2012	367.1	203.0	161.0	168.8	899.8
2013	373.1	206.8	162.5	171.7	914.1
2014	379.3	210.5	164.0	174.3	928.2
2015	385.5	214.4	165.5	176.7	942.1
2016	391.8	218.3	167.1	179.1	956.3
2017	397.6	222.1	168.6	181.3	969.6
2018	402.9	226.0	170.0	183.2	982.1
2019	408.3	229.9	171.5	185.2	994.8
2020	413.8	233.8	172.9	187.1	1,007.7
2021	419.3	237.9	174.4	189.1	1,020.7
2022	424.3	242.0	175.9	191.1	1,033.3
2023	428.7	246.0	177.4	193.1	1,045.4
2024	433.2	250.2	179.0	195.2	1,057.6
2025	437.8	254.4	180.5	197.3	1,070.0
2026	442.4	258.7	182.1	199.4	1,082.5
Expenditure Growth					
2012-2015	18.4	11.3	4.5	8.0	42.3
2015-2017	12.1	7.8	3.0	4.6	27.5
2017-2021	21.7	15.8	5.9	7.8	51.1
2021-2026	23.1	20.8	7.6	10.2	61.8
2012-2026	75.3	55.7	21.1	30.6	182.7
Average Annual Growth Rate					
2012-2015	1.6%	1.8%	0.9%	1.5%	1.5%
2015-2017	1.6%	1.8%	0.9%	1.3%	1.4%
2017-2021	1.3%	1.7%	0.9%	1.1%	1.3%
2021-2026	1.1%	1.7%	0.9%	1.1%	1.2%
2012-2026	1.3%	1.7%	0.9%	1.2%	1.3%

**Constant 2011/12 dollars & Including GST*
Source : Marketinfo

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TABLE 2.4 – MAIN TRADE AREA RETAIL EXPENDITURE BY KEY COMMODITY GROUP

Y/E June	Food & Liquor	Food Catering	Apparel	H'hold Goods	Leisure	General Retail	Retail Services
2012	414.3	126.3	88.6	141.6	47.2	55.9	25.9
2013	419.7	128.5	90.2	144.2	48.1	56.9	26.4
2014	425.1	130.8	91.8	146.7	48.9	57.9	26.9
2015	430.3	133.1	93.4	149.3	49.8	58.9	27.3
2016	435.6	135.4	95.0	151.9	50.6	60.0	27.8
2017	440.5	137.6	96.6	154.3	51.4	60.9	28.2
2018	445.0	139.6	98.0	156.7	52.2	61.9	28.7
2019	449.6	141.8	99.5	159.0	53.0	62.8	29.1
2020	454.1	143.9	101.0	161.5	53.8	63.8	29.5
2021	458.8	146.1	102.6	163.9	54.6	64.7	30.0
2022	463.2	148.2	104.1	166.3	55.4	65.7	30.4
2023	467.3	150.3	105.5	168.6	56.2	66.6	30.8
2024	471.5	152.4	107.0	171.0	57.0	67.5	31.3
2025	475.7	154.5	108.5	173.4	57.8	68.4	31.7
2026	480.0	156.6	110.0	175.8	58.6	69.4	32.1
Expenditure Growth							
2012-2015	10.8	4.6	3.2	5.1	1.7	2.0	0.9
2015-2017	15.5	6.8	4.7	7.6	2.5	3.0	1.4
2017-2021	18.3	8.5	6.0	9.6	3.2	3.8	1.7
2021-2026	21.2	10.6	7.4	11.9	4.0	4.7	2.2
2012-2026	65.7	30.4	21.3	34.2	11.4	13.5	6.2
Average Annual Growth Rate							
2012-2015	1.3%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
2015-2017	1.2%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
2017-2021	1.0%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
2021-2026	0.9%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%
2012-2026	1.1%	1.6%	1.6%	1.6%	1.6%	1.6%	1.5%

**Constant 2011/12 dollars & Including GST*
Source : Marketinfo

3 COMPETITIVE ENVIRONMENT

i. Map 2.1 previously illustrates the location of competitive supermarket facilities surrounding the proposed Clemton Park Village Centre, while Table 3.1 details these facilities.

TABLE 3.1 – COMPETITIVE ENVIRONMENT

Centre	Shopfront GLA (sq.m)	**Anchor Tenants**	Dist. From Clemton Park (km)
Regional Shopping Centres			
Centro Roseland	61,500	Myer (24,052), Target (8,135), Coles (4,597), Food For Less (2,011)	4.6
Bankstown	*103,900*		10.0
• Centro Bankstown	85,700	Myer (10,150), Big W (8,044), Kmart (7,771), Target (6,900), Woolworths (4,000), Franklins (2,185)	
• Remainder	18,200		
Sub-regional Shopping Centres			
Campsie	*24,400*		2.1
• Campsie Centre	12,400	Big W (7,662)	
• Remainder	12,000	Woolworths (2,971)	
Ashfield Mall	24,700	Kmart (7,269), Woolworths (4,000), Coles (3,500), Franklins (1,664)	5.6
Chullora Marketplace	17,300	Big W (8,159), Woolworths (4,207)	7.6
Supermarket Based Shopping Centres			
Canterbury	*4,800*		
• Lumex Canterbury	1,100	IGA (600)	1.2
• Remainder	3,000	Aldi (1,350)	2.0
Bexley North	3,000	Woolworths (531)	2.4
Earlwood	5,000	Coles (2,750)	2.7
Lakemba	4,400	Aldi (1,350), IGA (700)	3.3
Marrickville	8,000	Woolworths (3,000), Foodworks (1,200)	6.5
Wolli Creek	4,200	Woolworths (4,200)	6.8

Source : Australian Shopping Centre Council Database - March 2012

Main Trade Area Retailers

i. The most relevant retail facilities to the proposed Clemton Park Village Centre are those supermarket based shopping centres located within the main trade area. Details on these include:

- The largest retail provision provided within the main trade is located within the Campsie retail precinct. The Campsie retail precinct includes around 24,400 sq.m of retail floorspace, including the following major components:

  - Campsie Centre forms the largest component of the Campsie retail precinct and is anchored by a Big W discount department store of 7,662 sq.m. The centre encompasses some 12,400 sq.m of retail floorspace and has a Asian retail focus, given the ethnicity of the surrounding population.

  - A Woolworths supermarket of 2,971 sq.m with a small provision of specialty shops is situated immediately opposite the Campsie Centre. This supermarket is the nearest full-line supermarket (i.e. greater than 2,500 sq.m) to the proposed Clemton Park Village Centre and is understood to be trading strongly.

  - Additionally, over 100 shopfronts are provided along the Beamish Street retail strip, including wide variety of fresh food stores, cafes and restaurants, real estate agents, banks, fresh produce stores and the like. Food tenants have a significant emphasis on Asian food traders, particularly from North-East and South-East Asia.

- Lumex Canterbury is the newest retail centre to open within the main trade area and is located 1.2 km to the north-east of the site. The centre includes around 1,600 sq.m of floorspace, including a small IGA supermarket of around 600 sq.m (including liquor). Given the small size of the overall retail component, Lumex Canterbury is likely to serve the top-up convenience shopping needs of the immediate population only and is unlikely to be of significant competitive relevance to retail floorspace at the proposed Clemton Park Village Centre.

- The Earlwood retail precinct is primarily focused along Homer Street (secondary east sector) and includes around 100 shopfronts. The precinct is anchored by a newly refurbished Coles supermarket of 2,700 sq.m. Overall, the strip has a strong convenience focus.

- At Lakemba, some 3.3 km to the west of the site, a small IGA supermarket of 700 sq.m and Aldi supermarket of 1,350 sq.m anchor the retail strip that is provided along Haldon Street. Neither of these stores are full-line supermarkets that would serve the weekly food and grocery shopping needs of the surrounding population. Overall, the strip includes around 220 retail and non-retail shopfronts, with a strong provision of fresh food and food catering tenants.

ii. A full-line supermarket is typically considered to be 2,500 sq.m in size, providing the full range of food related departments, such as dry groceries, bakery, deli, butcher, fresh food, perishables, seafood and the like. A major full-line supermarket, in-line with modern Australian standards, is typically greater than 3,000 sq.m with the largest sized stores some 4,000 sq.m or larger and generally operated by the major chains, namely Woolworths and Coles.

iii. It is important to note that there are currently no major full-line supermarkets provided within the defined main trade area, with all main trade area located supermarket less than 3,000 sq.m in size.

Retailers Beyond the Main Trade Area

i. Similarly supermarkets located immediately beyond the main trade area, are also generally small in size and serve separate catchment areas, given the primarily local convenience offer the stores provide. The closest supermarkets situated beyond the main trade area include:

  - A Woolworths supermarket of 531 sq.m at Bexley North.

  - An IGA supermarket of 700 sq.m at Dulwich Hill.

- Woolworths (3,000 sq.m) and Foodworks (1,200 sq.m) supermarkets at Marrickville South.

ii. A major full-line supermarket of 4,200 sq.m has recently opened at Wolli Creek, 6.8 km to the south-east of the site. However, the store would primarily serve a separate catchment area, given the location of this store to the south of the Cooks River and East Hills Railway Line.

iii. Major full-line supermarkets are provided throughout the surrounding regional and sub-regional shopping centres, with each of these located more than a 10 km round trip for many trade area residents. These include:

- Coles of 4,597 sq.m at Centro Roselands, 4.6 km to the south-west.
- Woolworths of 4,000 sq.m and Coles of 3,500 sq.m supermarkets at Ashfield Mall, 5.6 km to the north-east.
- A Woolworths of 4,207 sq.m supermarket at Chullora Marketplace, 7.6 km to north-west.
- Woolworths of 4,000 sq.m supermarket at Centro Bankstown, 10 km to the west.

iv. These centres would be achieving a proportion of supermarket spending from the Clemton Park Village Centre main trade area, given the size and scale of retail provided and the general lack of major full-line supermarket facilities (i.e. greater 3,000 sq.m) within the main trade area.

Proposed Developments

i. The most relevant competitive developments either under construction, approved or proposed throughout the Canterbury area as shown in Table 3.2.

TABLE 3.2 – FUTURE COMPETITION

Name	Additional Retail GLA (sq.m)	Components	Status	Assumed Opening Date
Secondary North				
Campsie Civic Centre	5,700 - 7,700	Supermarket (3,700) & shops	Early Planning	2017/18
Beyond Trade Area				
The Pottery, Kingsgrove	3,885	Woolworths Supermarket (2,905) & shops	Under Construction	2012/13
Wolli Creek Mixed Development				
• DA Approved	1,300	Dan Murphy's (1,300)	Under Construction	2012/13
• DA Revoked	24,000	DDS (6,055), Supermarket (3,558), Cinema & shops	n.a.	
Broadway Plaza, Punchbowl	8,500	Woolworths Supermarket (4,200) & shops	Under Construction	2012/13
174-176 Lakemba St, Lakemba	2,387	Supermarket (1,951) & shops	DA Approved	2013/14
Wiley Park TC Redeveopment	2,404	Mini supermarket & shops	DA Approved	2014/15
Aldi Wolli Creek	2,005	Aldi Supermarket (1,570) & five shops	DA Submitted	2014/15
Centro Roselands	2,346	New cinema, bowling alley, restaurant & specialty floorspace	DA Approved	n.a.
Canterbury Town Cente	4,470	Supermarket (2,866) & shops	Mooted	2016/17
Charles St Mixed Development	5,003	Supermarket (3,400) & shops	DA Withdrawn	n.a.

ii. The proposed Campsie Civic Centre is currently the only major retail facility proposed within the Clemton Park main trade area. The Masterplan for the proposed Campsie Civic Centre indicates the potential for a supermarket of 3,700 sq.m in addition to around 2,000 – 4,000 sq.m of specialty floorspace. In total, a retail development of 5,700 – 7,700 sq.m is planned in addition to Council Civic, Administration and Library, commercial and residential components. As discussed previously, timing for the development is uncertain, but for the purposes of this report a supermarket is assumed to open at the site by 2017/18.

iii. A range of retail developments are also proposed or under construction beyond the main trade area. Details of these include:

- A Woolworths supermarket of 2,900 sq.m and small provision of supporting specialty shops is currently under construction as part of a larger residential and commercial development along Mashman Avenue in Kingsgrove. The development, which is being referred to as The Pottery, Kingsgrove, is assumed to be completed by 2012/13.

- A Dan Murphy's liquor outlet of 1,300 sq.m is currently under construction next to the recently opened Woolworths supermarket at Wolli Creek.

- A Woolworths supermarket of 4,200 sq.m and around 4,300 sq.m of specialty shops are currently under construction along The Broadway in Punchbowl. Leasing for the development, which is being referred to as Broadway Plaza, is already underway. The development is assumed to be trading by 2012/13. This centre is some 5 km away from Clemton Park Village Centre, serving a different trade area market and, therefore, is of limited relevance.

- An application for a mixed use development including residential, commercial and retail floorspace has been approved at 174-176 Lakemba Street in Lakemba. The development will be constructed on the former Lakemba Palms Plaza, which was destroyed by fire in late 2007. This development is proposed to include a supermarket of 1,951 sq.m and retail specialty floorspace of 859 sq.m.

Construction is yet to begin despite a construction certificate being issued in May 2010. For the purposes of this report, the development is assumed to be trading by 2013/14.

- A redevelopment of the Wiley Park Town Centre, which will include residential, retail and commercial components, is currently proposed on the corner of Lakemba Street and King Georges Road. Stage One of the development has been approved to include around 2,400 sq.m of retail floorspace, including a "mini supermarket," (most likely an Asian grocer). The site is currently for sale, with development approval.

iv. Additionally, information supplied by Australand indicates a development application is about to be lodged for a mixed use development on northern corner of Canterbury Road and Charles Street. Along with a residential component, the development will include a retail centre anchored by a supermarket of 2,866 sq.m. The proposed centre will also include 1,600 sq.m of specialty shops, including a number of cafes/restaurants and a liquor outlet that will adjoin the planned supermarket.

Main Trade Area Supermarket Provision

i. Table 3.3 summarises the provision of supermarket floorspace by main trade area sector. As shown, the provision of supermarket floorspace is well below both the Sydney metropolitan and Australian averages across all sectors. The main trade supermarket floorspace provision of 100 sq.m per 1,000 persons is around 40% of the Sydney Metropolitan average and 32% of the Australian average. This would indicate supermarket floorspace throughout the main trade area is currently trading at above average levels. On inspection, all supermarket facilities within the main trade area appear to be trading very well.

ii. As discussed earlier, there are currently no major full-line supermarkets (i.e. greater than 3,000 sq.m) provided within the main trade area, with the closest major full-line supermarkets situated 5 km away at Centro Roselands and Ashfield Mall.

TABLE 3.3 – MAIN TRADE AREA SUPERMARKET FLOORSPACE PROVISION, 2012

Trade Area Sector	No. of Supermarkets*	GLA (sq.m)	2012 Population	GLA per 1,000 persons
Primary Sector	2	3,671	34,220	107
Secondary Sectors				
• North	0	0	19,830	0
• East	1	2,750	13,240	208
• West	2	1,950	16,760	116
Total Secondary	3	4,700	49,830	94
Main Trade Area	**5**	**8,371**	**84,050**	**100**
Sydney Metropolitan Average				*249*
Australian Average				*312*

** Defined as 500 sq.m or larger*

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iii. The relatively small size of existing supermarkets in the trade area is reflected in Table 3.3 which shows the provision of floorspace is very low. Residents of the trade area, therefore, are not being provided with a modern supermarket offer to fulfil their daily and weekly food and grocery requirements.

iv. Table 3.4 outlines the provision of supermarket floorspace in 2017/18 (anticipated opening year of Campsie Civic Centre), assuming major full-line supermarkets are developed at Clemton Park (3,800 sq.m) and Campsie (3,700 sq.m).

v. As shown, despite the opening of two new major full-line supermarkets to the Clemton Park main trade area the supermarket provision is still low, at 187 sq.m per 1,000 sq.m. This indicates there will still be significant room for supermarket developments immediately beyond the trade area to proceed (such as Canterbury Town Centre and The Pottery), with these centres still likely to attract a portion of main trade area residents spending.

vi. It is important to note, however, despite this shared spending that each of the proposed supermarket centres, like Campsie Civic Centre, Canterbury Town Centre and The Pottery, would serve a broader area to the defined Clemton Park Village Centre (i.e. extending further north for Campsie and Canterbury and further south for The Pottery).

vii. As such, despite the development of Clemton Park Village Centre, each centre would co-exist serving slightly different catchments in an area, where the supermarket floorspace provision is low.

TABLE 3.4 – MAIN TRADE AREA SUPERMARKET FLOORSPACE PROVISION, 2018

Trade Area Sector	No. of Supermarkets*	GLA (sq.m)	2018 Population	GLA per 1,000 persons
Primary Sector	3	7,471	34,620	216
Secondary Sectors				
• North	1	3,700	20,230	183
• East	1	2,750	13,260	207
• West	2	1,950	16,800	116
Total Secondary	4	8,400	50,290	167
Main Trade Area	**7**	**15,871**	**84,910**	**187**
Sydney Metropolitan Average				*249*
Australian Average				*312*

** Defined as 500 sq.m or larger*

4 IMPACT ANALYSIS

i. In order to assess the potential economic impacts and benefits that may arise from the development of the additional floorspace now proposed at Clemton Park Village Centre, the sales level which the development is projected to achieve is outlined. This sales level is compared with the existing approved development, to look at the additional sales and, consequently, the additional impacts.

ii. The sales performance of any particular retail facility, be it an individual store or collection of stores provided in a shopping centre or precinct, is determined by a combination of the following critical factors:

- The quality of the facility, including major trader or traders; specialty mix; centre layout and configuration; ease of accessibility and parking; and the overall feel of the centre.
- The size of the trade area catchment the facility serves.
- The locations and strengths of competitive retail facilities.

iii. Taking all of these factors into account, Table 4.1 details the sales levels which would be achieved by the approved concept plan retail centre at Clemton Park Village, as compared with the now proposed Clemton Park Village Centre development. The components of the development include:

- A supermarket, which is now 1,200 sq.m larger.
- A mini-major tenant which is assumed to be a fresh food related mini-major across both schemes.
- A provision of specialty shops.

iv. The assumed year of development is 2015/16, with all sales presented in constant 2012 dollars (i.e. excluding inflation) and including GST. It is important to note that the projected sales for the mini-major trader of 1,500 sq.m are the maximum such a trader should achieve at the Clemton Park Village Centre location.

v. The approved concept plan centre is projected to achieve sales of $56.0 million, as compared with $64.6 million for the now proposed scheme. The difference between the two schemes is $8.6 million, with a higher level of supermarket sales in the new scheme offset to a degree by a lower provision of specialty stores and consequently lower specialty sales. The incremental sales difference between the two schemes is of relevance in assessing the likely additional economic impact from the proposed development.

TABLE 4.1 – CLEMTON PARK VILLAGE ADDITIONAL PROJECTED SALES, 2015/16

Tenant	Concept Plan Approval GLA (sq.m)	Concept Plan Approval Sales ($M)	Proposed Centre GLA (sq.m)	Proposed Centre Sales ($M)	Additional Sales ($M)
Majors					
Supermarket	2,585	23,594	3,800	35,269	11,675
Total Majors	2,585	23,594	3,800	35,269	11,675
Mini-Major	1,500	12,704	1,500	13,716	1,011
Specialty Shop	2,900	19,687	2,090	15,633	-4,054
Total Retail	**6,985**	**55,985**	**7,390**	**64,617**	**8,632**

**Constant 2011/12 dollars & Including GST*

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Sales Impacts

i. This sub-section of the report outlines the likely sales impacts on competitive retail centres/facilities as a result of the additional 405 sq.m of retail floorspace that is currently proposed at Clemton Park Village Centre, over and beyond the already approved concept plan.

ii. It is important to note that impacts outlined in this report are indicative as it is difficult to precisely project the sales impacts of the opening of a new store/centre on existing retail facilities. A number of factors can influence the impacts on individual centres/retailers, including but not limited to:

- Refurbishment/improvement to existing centres.

- Expansions to existing centres.

- Loyalty programs of existing retailers.

- The existing centre mix and how it compares with the proposed development.

iii. For all of these reasons and other similar factors, sales impacts as outlined in this report should be used as a broad indication.

iv. Table 4.2 outlines projected sales impacts from the additional 405 sq.m of retail floorspace at Clemton Park Village Centre, above and beyond the already approved 6,985 sq.m scheme. The steps involved in assessing the sales and impacts on competitive centres are as follows:

  - Step 1 – project sales for existing and proposed centres in the 2016 Financial Year, the first full year of trading for the proposed Clemton Park Village Centre. This assumes the opening of the approved concept plan for Clemton Park Village Centre (i.e. 6,985 sq.m retail centre, anchored by a supermarket of 2,600 sq.m). These projections allow for retail market growth and new retailers/centres. All sales projections in 2016 are presented in constant 2012 dollars (excluding inflation).

  - Step 2 – outlines the change in sales at each centre in 2016 as a result of the proposed additional 405 sq.m and larger supermarket at Clemton Park Village Centre.

  - Step 3 – show the difference in impacts on sales in 2016 from the new scheme, both in dollar terms and percentage of sales.

v. The key information outlined in Table 4.2 is summarised as follows:

  - The additional 405 sq.m of retail floorspace proposed at Clemton Park Village Centre is projected to record some $8.6 million in additional sales in 2016. This can be compared with retail spending growth in the main trade area over the next four years of some $56.4 million, meaning that the expanded centre will only take some 15.3% of additional spending growth in the market with all the other growth available to other retailers.

TABLE 4.2 – IMPACT ANALYSIS

	Unit	Projected 2016 Pre Exp.	Projected 2016 Post Exp.	Impact 2016 $M	Impact 2016 %
Clemton Park Village Centre	*$M*	*62.8*	*64.6*	*1.8*	*n.a.*
Regional SC					
Centro Roselands	$M	291.8	290.6	-1.2	-0.4%
Bankstown CBA	$M	522.6	522.6	0.0	0.0%
Total Regional Centres	$M	814.3	813.2	-1.2	-0.1%
Sub-Regional Centres					
Campsie Town Centre	$M	132.6	129.6	-3.0	-2.3%
Ashfield Mall	$M	168.8	168.4	-0.4	-0.2%
Total Sub-Regional Centres	$M	301.4	298.0	-3.4	-1.1%
Supermarket Centres					
Bexley North	$M	17.0	17.0	0.0	0.0%
Earlwood	$M	40.8	39.6	-1.2	-3.0%
Canterbury*	$M	57.2	56.4	-0.8	-1.3%
Lakemba	$M	25.3	24.8	-0.5	-2.0%
Marrickville	$M	65.9	65.6	-0.3	-0.5%
Wolli Creek	$M	59.4	59.1	-0.3	-0.5%
Broadway Plaza	$M	54.5	54.5	0.0	0.0%
The Pottery, Kingsgrove	$M	31.9	31.5	-0.3	-1.0%
Total Supermarket Centres	$M	352.0	348.6	-3.4	-1.0%

** Including the proposed Canterbury Town Centre*
**Constant 2011/12 dollars & Including GST*

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- The largest impact in dollar terms is likely to occur on the Campsie Town Centre with an additional impact of $3.0 million or 2.3%. This is insignificant in economic terms with Campsie Town Centre still comprising over 150 retailers, as compared with around 22 retailers proposed at Clemton Park Village Centre. Importantly, most of the additional impact will be on the Woolworths supermarket in the Campsie Town Centre, which is understood to trade at very high levels. This supermarket will remain viable and anchor other specialty stores within the region.

Importantly, the strength of the Campsie Town Centre will be enhanced by the development of the Campsie Civic Centre at some future date which will continue to result in a very strong trading precinct.

- The impact on the Earlwood retail precinct is estimated at 3.0% or $1.2 million, again with the Coles supermarket remaining viable as a key anchor tenant in that precinct.

- The third largest impact in dollar terms is likely to fall on the Canterbury retail precinct that includes the proposed Canterbury Town Centre. As discussed earlier, this centre is likely to serve a slightly different trade area catchment to the proposed Clemton Park Village Centre, given the location of the site on the northern side of the Cooks River. As such, the impact on this precinct is projected to be minimal at less than $1 million and would, therefore, in no way impact on the potential to accommodate the Canterbury Town Centre development on the site.

vi. Overall, it is important to note that the proposed impacts from the small expansion of Clemton Park Village Centre as compared with the approved scheme are only likely to be experienced by competitive facilities in the short term, and that these stores will benefit from the growth in the retail market once these small impacts have been absorbed.

<u>Employment and Consumer Impacts</u>

i. The development of Clemton Park Village Centre as now proposed will result in a number of positive economic benefits which will be of direct benefit to the local community.

ii. The key positive and consumer employment impacts resulting from the additional expansion of Clemton Park Village Centre will include:

- The provision of a major full-line supermarket of over 3,000 sq.m, with the closest such stores more than 5 km away for the majority of residents within the trade area.
- The additional 405 sq.m of floorspace will result in an additional 21 persons employed, both directly employed at the centre and indirectly from the supplier induced multiplier effect (Tables 4.3 and 4.4).
- Additionally, estimated capital costs for the construction of the additional component of the development are $15 million. By using the appropriate ABS input/output multipliers that were last produced in 1996/97 and in deflated estimated total capital cost of construction of $11.8 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed additional floorspace at Clemton Park Village Centre would create 82 direct jobs and 132 indirect jobs (refer Table 4.5).
- Total employment opportunities from the additional floorspace equate to 236 jobs.
- A reduction in travel time and petrol cost savings for the main trade area population who currently are frequenting major full-line supermarket facilities beyond the trade area.

iii. It is concluded that the combination of the substantial positive economic impacts serve to more than offset the limited trading impacts that can be anticipated from the small proposed expansion of the Clemton Park Village Centre approved scheme. Further, the impacts from the amended proposal would not threaten the viability of any retailers or centres throughout the surrounding area or limit the future of planned/proposed centres including, the Campsie Civic Centre proposal

TABLE 4.3 – RETAIL EMPLOYMENT

Type of Use	Estimated Employment Per '000 sq.m	Clemton Park Village Centre Change in GLA (sq.m)	Clemton Park Village Centre Employment (persons)
Supermarket	50	1,215	61
Mini-majors	20	0	0
Retail Specialty Shops	60	-810	-49
Total Centre[1]		**405**	**12**
Net Increase[2]			**11**

1. Excludes non-retail components.
2. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase

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TABLE 4.4 – MULTIPLIER EMPLOYMENT

Original Stimulus	Direct Employment	Supplier Employment *Multiplier Effects*	Total
Centre Employment[1]	11	10	21

** Employment totals include both full-time and part-time work*
1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development
Source : Australian National Accounts: Input-Output Tables 1996-97

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TABLE 4.5 – CONSTRUCTION EMPLOYMENT

Original Stimulus	Estimated Capital Costs ($M)[1]	Direct Employment	Supplier Employment *Multiplier Effects*	Total	
Construction of Project	11.8	82	132	215	Job Years[2]

** Employment totals include both full-time and part-time work*
1. Adjusted by inflation and productivity to 1996/97 Dollars
2. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year
Source : Australian National Accounts: Input-Output Tables 1996-97

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Commercial Component

i. The original approved concept plan allowed for some 2,000 sq.m of commercial floorspace. Commercial floorspace is typically targeted at office tenancies, medical centres and the like.

ii. Clemton Park Village Centre, however, is not ideally suited for commercial/office floorspace, with higher profile locations, such as the Campsie Town Centre which is situated around major rail and other public transport facilities, being more accessible for this type of usage. These other areas also have a broader provision of services such as banking, medical and other non-retail functions which assist in the provision of operating successful commercial premises.

iii. Consequently, it is our view that a reduction in the commercial floorspace, offset to a degree by a slightly enlarged retail provision, is appropriate in the overall hierarchy of centres taking into account the mix of uses and not just the retail development.

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