



Bonnefin
PROPERTY

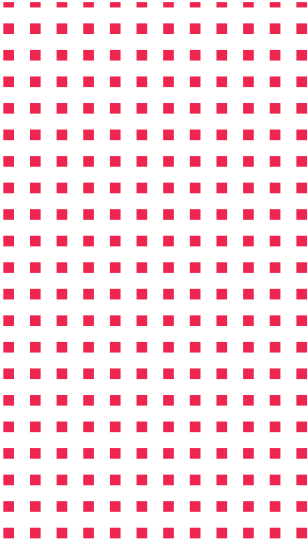
42-60 Railway Parade Burwood

Retail Development Consultancy

Holdmark Property Group
Updated 19th September 2016

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01. Introduction



01

The changing intensity of the demographic of Burwood, its high street, ethnicity, proximity to transport and the CBD align perfectly with our retail vision and concept for the project.

This site has without doubt, the ability to create a new benchmark in Western Sydney and an exciting retail and residential destination within Burwood. I have thoroughly enjoyed the collaborative approach to the development of the concept to date and in working with Architectus and their urban planning and creative design team.

The plans as presented to the team on 12th March, I believe truly encapsulate the retail vision, articulated beautifully the opportunity to create a busy, successful and vibrant new urban residential and retail village.

The future of urban retail is in food, entertainment and convenience retailing. In fact food is such an intrinsic part of our culture and heritage and by creating wonderful urban spaces, outdoor parks and playgrounds, places to meet, eat and entertain, we underpin the projects success.

If you look at the way urban design and shopping centres have developed over the last 3 -5 years, in the majority of cases outdoor dining, internal open streets and a more finer grain approach to the connectivity of people and place is evident.

I feel confident that the concept outlined herein will yield a very positive result for Holdmark Property Group.

Yours faithfully

Angela Bonnefin
Principal Bonnefin Property

02. Objective & Methodology



Retail Objective

- To create a retail concept and vision for Burwood that maximises the project potential whilst fully integrating with the residential and commercial components of the site.
- The retail vision should align and compliment the branding of the residential and add value to the amenity and offer of the project overall.
- To develop space that operates efficiently and where practical has long term in-built flexibility in the design to respond to the changing demands of the occupants and future retail requirements.
- To maximise potential income by developing concepts that are leasable and operationally functional.
- The retail component of the project should be seen as complimentary to the existing retail hierarchy already established within Burwood, especially the Westfield Shopping Centre that dominates the current offer within Burwood.

Methodology

- We have reviewed the original plans as supplied by the client and their design team.
- We have reviewed the following marketing reports:
 - Information Memorandum prepared by Savills and Colliers
 - Burwood Town Centre Report – Future Directions
 - Information Memorandum prepared by Stonebridge and Centuria
 - Burwood Plaza Exit Survey and Market Assessment prepared by Urbis Oct 13
 - Report prepared by BellRinger
 - Various Council Publications found on their web site.
 - Location IQ Demand Study
- We have attended a number of client briefings and work shops and on site inspections, to enable us to refine the retail master plan and provide input into both the design, layout and functionality of the defined spaces.
- We have reviewed all essential back of house services, including loading, storage and garbage and have provided input into the concept design process.
- We have developed a retail vision and concept most suitable for the development.
- We have reviewed many of our past projects, market research and our knowledge of successful retail precincts which has assisted us in formulating our retail vision and concept for the project.

03. Vision & Concept



Retail Vision & Concept

Our retail vision and concept for large scale developments is often influenced as much by what we know not to develop, as much as what we know will work.

We believe to simply develop a typical suburban based shopping centre lacks imagination and forethought and completely misses the opportunity which is to develop what will be an incredibly urban, high density, diverse and vibrant inner city environment.

Our vision and concept for the project is essentially founded on the principle of the Market Place. The creation of a Market Place, a collection of supermarkets and food providers, restaurants, bars and cafés, connected by a series of outdoor dining and recreation areas. With all successful Market Places, essential services are an important part of the offer and we see these being inter-woven in the high street design on ground level.

In addition to the Market Place and subject to final demand analysis an Entertainment Precinct is an extremely complimentary addition to this concept and would assist in the creation of a town square.

The success of this model is fundamentally sound when we examine the design principals and place making that has been created for the project. Large scale, quality medium density residential, within close proximity to rail station and public transport nodes, surrounded by parks and quality landscaped urban spaces, high density residential and commercial precincts.

03. Vision & Concept



Retail Vision & Concept

The creation of the Market Place is the perfect way to knit together beautifully the fabric of the existing Burwood Road retail hierarchy and our newly developed precinct and will create the perfect setting to curate a retail environment.

Activation of the ground floor plane through a series of wide open streets and centred around a central open air piazza will enhance the ambience and vibe of the residential and commercial components and will be seen as a great benefit to the project.

Whilst the concept we develop for Burwood will be unique and carefully curated to ensure that each operator appeals to our very broad and ethnically diverse trade area, we have highlighted on the following pages some examples of the where the urban retail market place concept has worked well and off course Burwood will have a larger scale with the added bonus of the entertainment component.

Our retail vision and concept of the market place will be underpinned by the following key operators.

- Three Supermarkets - 4000 m2 and 1,500 m2 and 500 m2
- Fruit and Vegetable Market 1,000 m2
- Specialty Fresh Food such as Baker, Patisserie, Seafood, Butcher, Continental Deli, Health Food
- Cinemas and Entertainment such as Bowling and Laser Tag, Trampoline, Restaurants, Cafes and Bars
- Essential Services such as Pharmacy, Medical, Post Office, News agency, Banks, Health Care, Child Care

03. Vision & Concept



Retail Vision & Concept

There are some good examples of where this concept has been very successful. We highlight on the following pages some imagery of three relevant projects where we can draw on their current success, concepts and operators including:

James Street Markets, Fortitude Valley, Brisbane – approx. 2,500 m2 and located within a very cool high street retail precinct. Usages include Fruit and Veg, Bar, Flowers, Bakery, Seafood, Cooking School, Butcher, Gelato, Café, Nuts and Wheel and Barrow

Stockland Cammeray, Sydney – approx. 5,000 m2 and includes Harris Farm, Noodles, Café, Pizza, Simone Logue, Japanese, Butcher, Patisserie, Gifts, Liquor, Pharmacy, Nails and Hairdresser. Level 1 also accommodates a Medical Centre and Childcare.

Ferry Road Markets, Southport, Gold Coast – approx. 2,500 m2 and a true food destination and located adjacent to the Southport Brickworks Homemaker Centre. Usages include Fruit and Veg, Flowers, Bakery, Café, Butcher, Gelato, Seafood, Deli, Restaurant, Tea Centre and Wheel & Barrow.

Burwood will demand it's own unique operators and food styles to compliment it's own market and respond to the needs of it's changing and dynamic demographic but the above three projects are examples of successful evolving contemporary market places.

03. Vision & Concept



James St Markets
Fortitude Valley



03. Vision & Concept



Stockland Cammeray



03. Vision & Concept



Casual Dining
Family Friendly
Food



03. Vision & Concept



Precinct 1
Quick Service Food



03. Vision & Concept



Precinct 1
Quick Service Food



03. Vision & Concept



Casual Dining
Asian



03. Vision & Concept



Casual Dining



03. Vision & Concept



Coffee Culture



03. Vision & Concept



 Fresh Food



03. Vision & Concept



Fresh Food



03. Vision & Concept



 Fresh Food



03. Vision & Concept



Everyday Needs



03. Vision & Concept



—
Everyday Needs



03. Vision & Concept



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Everyday Needs



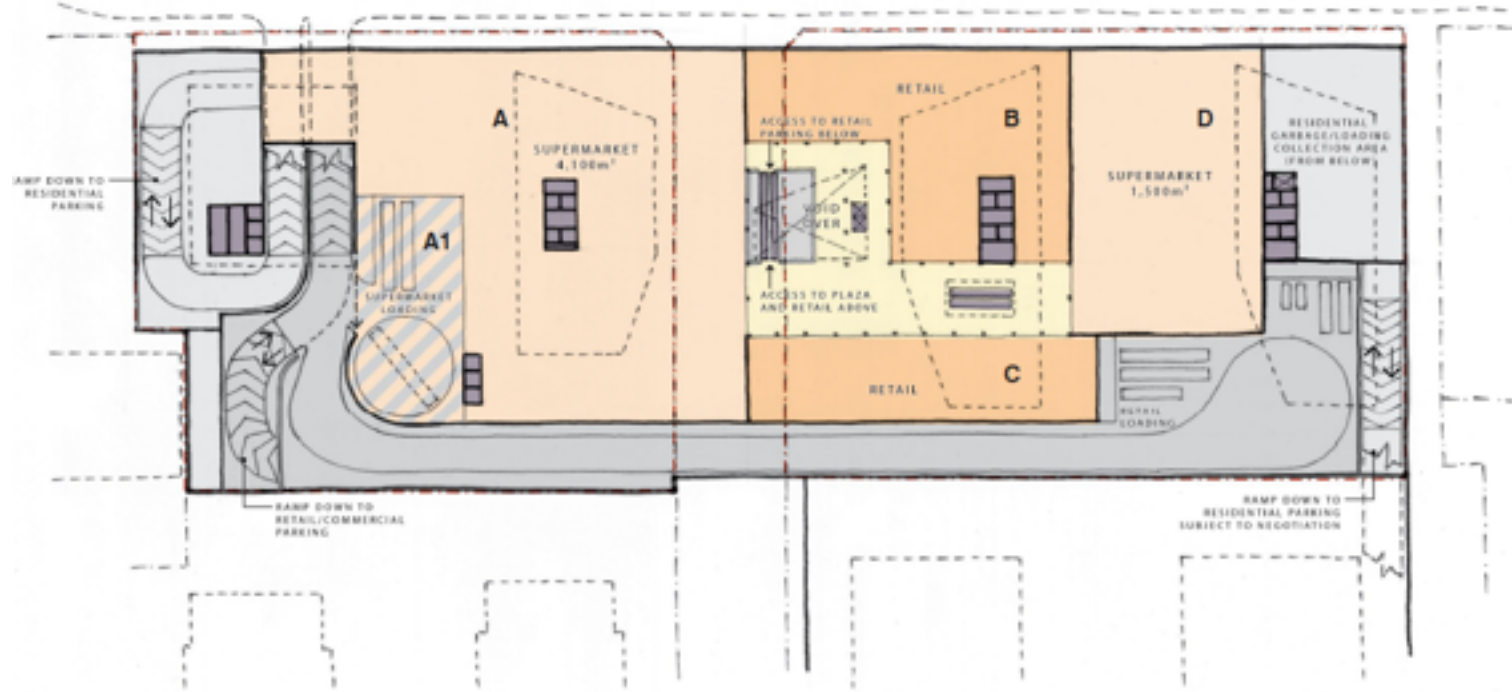
03. Vision & Concept



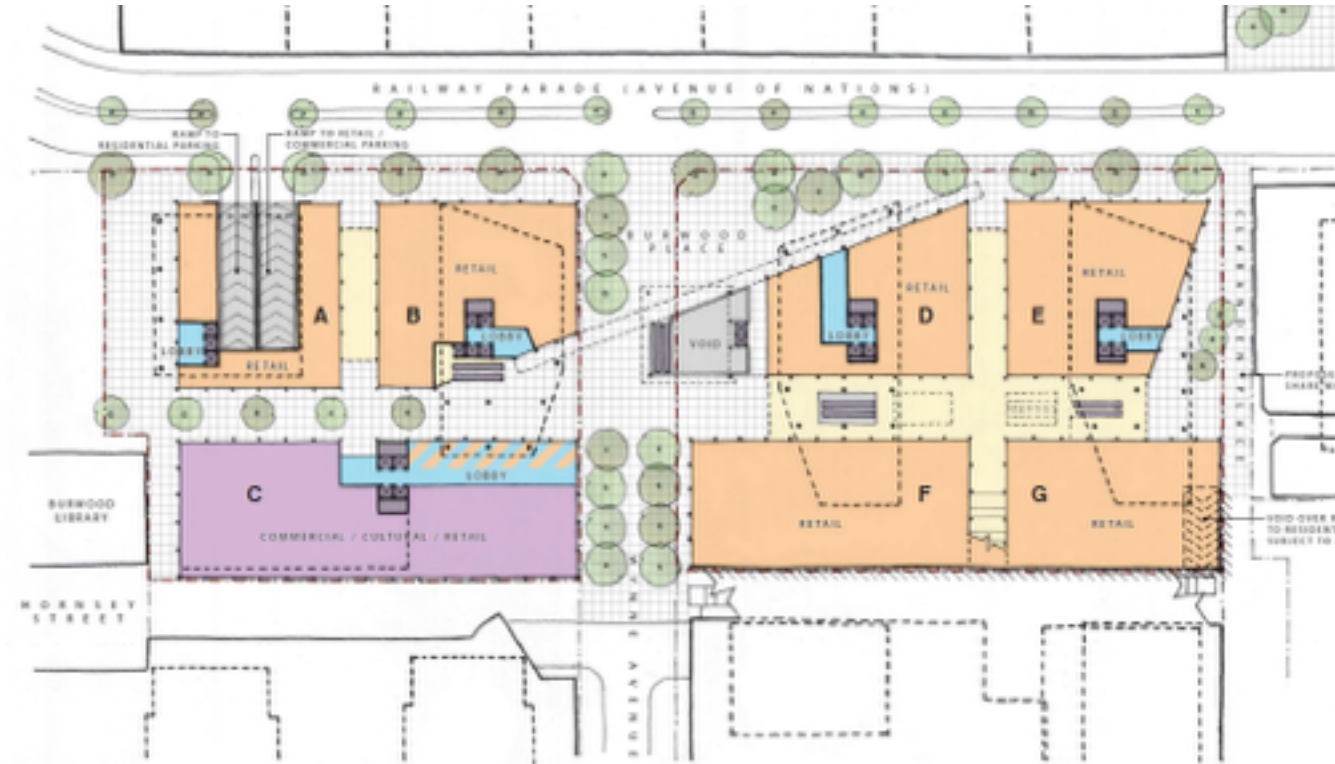
Healthy Lifestyle



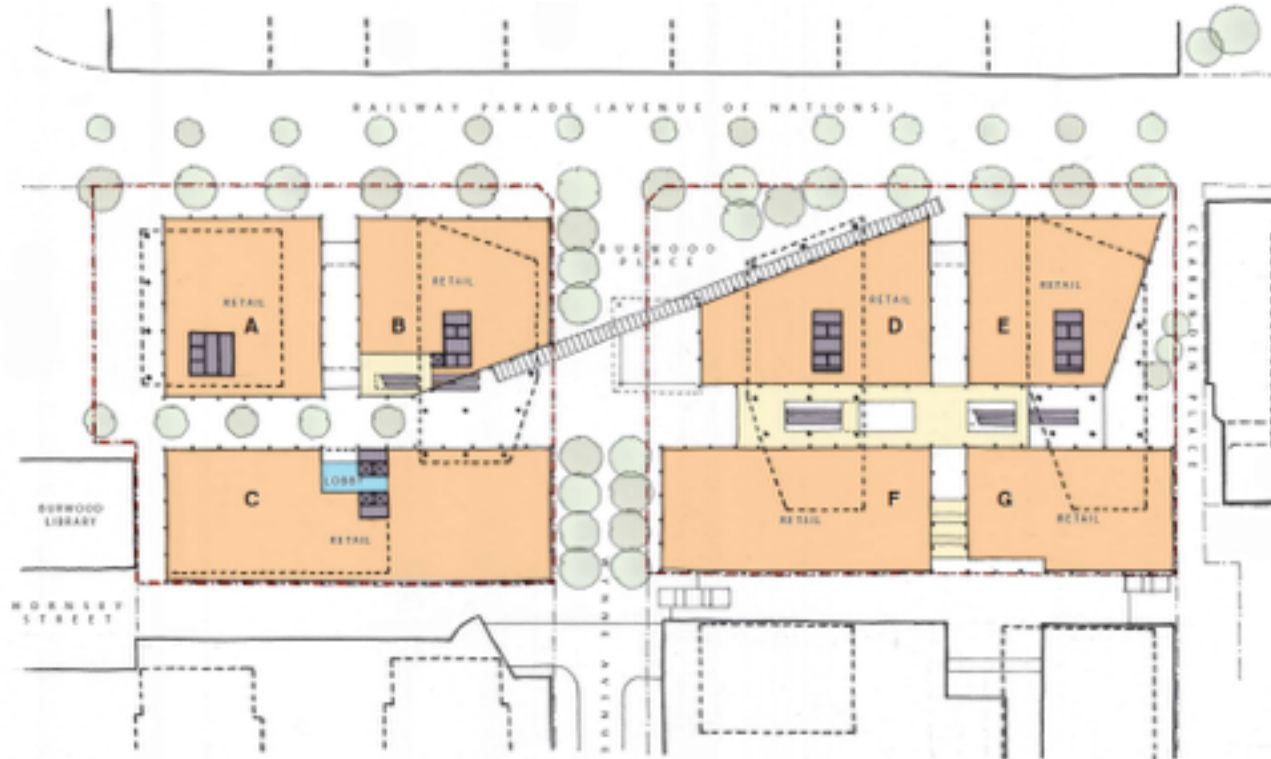
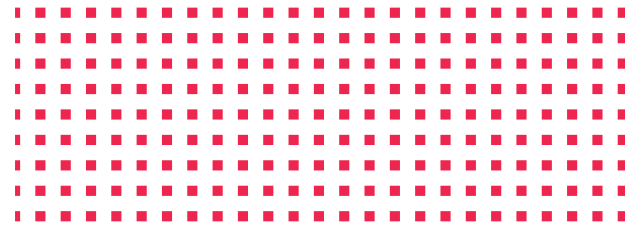
04. Design - Lower Ground



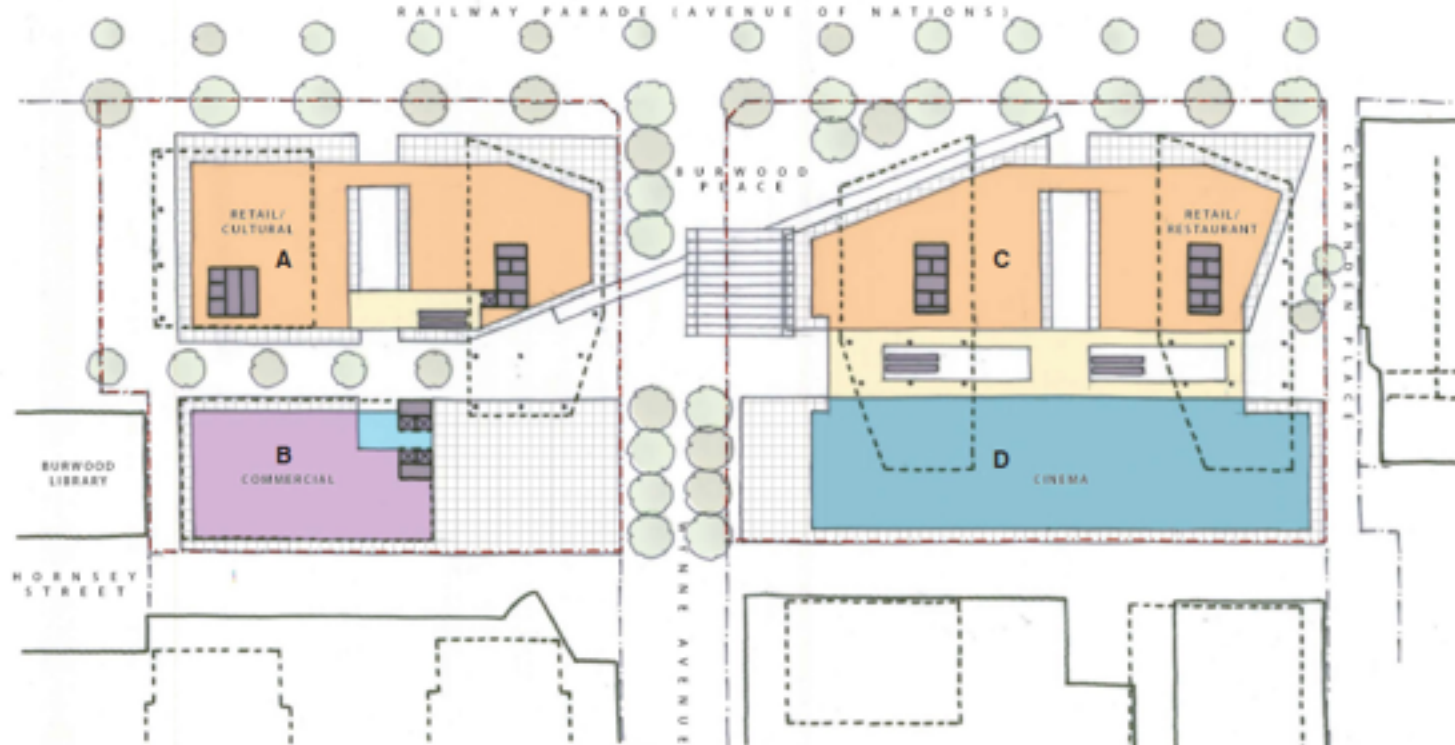
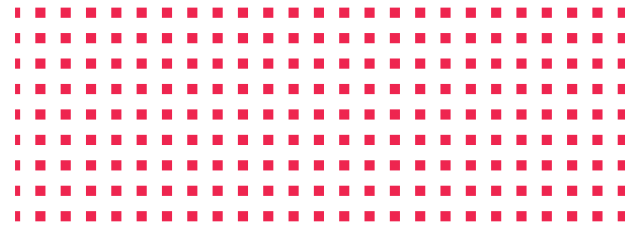
04. Design - Ground L1



04. Design - Podium L2



04. Design - Podium L3



04. Retail Test Fit



Location	Category	Net Area m2
Basement		
A	Supermarket	3,550
B	Fruit Market & Deli	1,385
C	Liquor	865
D	Supermarket	1,570
		7,370
Ground L1		
A	Specialty Retail	570
B	Café & Dining	990
C	Commercial/ cultural	1,422
D	Café & Dining	810
E	Everyday Needs and Convenience Retail	955
F	Fresh Food Specialty	1,230
G	Asian Grocer	970
		6,947

04. Retail Test Fit



Location	Category	Net Area m2
Podium L2		
A	Childcare	1,010
B	Gym	970
C	Medical and Health Care	1,800
D	Dining and Quick Service Food	1,020
E	Dining and Quick Service Food	1,000
F	Entertainment - Strike Bowl	1,230
G	Entertainment	900
		7,930
Podium L3		
A	Retail Cultural	1,350
B	Commercial Office	780
C	Restaurants	1,530
D	Cinema	1,880
		5,540
TOTAL		27,787

05. Perfect Partners



Perfect Partners

The key to the projects success is in the curation of each retail offering, understanding each business, hand-picking each operator. Every week new and fabulous retail food and dining business open and we want to encapsulate the spirit of a fabulous local bustling high street village.

The following pages provide an example and overview of our retail vision - concepts we see working together to create a world class urban residential regeneration and retail precinct. This is just the tip of the iceberg.....

05. Perfect Partners



Restaurants Bars Cafe's

1.

CBD/Inner City

Bavarian Beer Cafe - City
Spice Temple - City
Via Napoli - Hunters Hill
El Loco
Reuben Hills - Surry Hills
Red Lantern - Surry Hills
Da Vinci's - Summer Hill
Black Penny
Hartsyard
PHD
Yen for Viet
Young Henry's - Newtown
Bar Vini - Surry Hills
A Tavola
Cho Cho San
Manoosh Pizzeria - Enmore

2.

CBD/Inner City

Wayward Brewing Co - Annandale
Cantina Bar - Balmain
Wilhelmina's Liquid & Larder - Balmain
Bar Racuda - Enmore
Bauhaus West - Enmore
The Green Room Lounge - Enmore
The Sixth Borough - Enmore
Bakerman - Erskineville
Kiki Tanuki - Erskineville
Cornerstone Bar & Food - Eveleigh
Hem Nine Nine - Glebe
Mr Falcon's - Glebe
Staves Brewery - Glebe
The Little Guy - Glebe
Timbah - Glebe
Wild Kombucha by Ballsy Brewing - Leichardt

3.

CBD/Inner City

Berkelouw Wine Bar - Leichardt
The Royal Botanical - Leichardt
Batch Brewing Co - Marrickville
Lazybones Lounge - Marrickville
The Gritter Brewing Co - Marrickville
The Henson - Marrickville
The News-agency - Marrickville
Titus Jones - Marrickville
Continental Deli Bar Bistro - Newtown
Corridor - Newtown
Earl's Juke Joint - Newtown
Kingston Public - Newtown
The Midnight Special - Newtown
The Moose - Newtown
The Vanguard - Newtown
Tasting Bar at Wille the Boatman - St Peters

05. Perfect Partners



Fresh Food

1.

CBD/Inner City

Harris Farm - Multi Outlet
Parisi's - Rose Bay
Salt Meat Cheese - Drummoyne/Broadway
Hudson's - Multi outlets
Paterson's Patisserie - Multi outlets
Mercato Cucina - Gladesville
Organic Republic Bakery - Bondi
Sonoma - Multi outlets
Bourke St Bakery - Multi outlets
Costi Seafood - Multi outlets
Prime Quality Meats - Multi outlets
About Life - Rozelle/Cammeray
The Source - Multi outlets
Fratelli Fresh - Multi Outlets
Fourth Village Providore - Mosman
Char Grill Charlies - Multi outlets

2.

CBD/Inner City

Black Star Patisserie - Rosebery
Iggy's Bread - Bronte
Brickfield Bakery - Chippendale
Vic's Meats
AC Butchery - Leichardt
Gelato Messina - Multi outlets
Pasticceria Papa - Haberfield
Paesanella Cheese Shop - Haberfield
Adriano Zumbo Patisserie - Balmain
Norton Street Grocer - Multi outlets
Marrickville Organic Food Market
Black Star Patisserie - Rosebery
Rino Saffioti Chocolatier
Infinity Bakery - Manly
Haigh's - Multi outlets
Sam The Butcher - Bondi

3.

CBD/Inner City

New Yen Supermarket - Haymarket
Neu's Handmade German Bread - Banksmeadow
La Maison de l'eclair - Bondi
Black Velvet - Darlinghurst
La Banette - Glebe
Madhouse Bakery - Marrickville
Brooklyn Boy Bagels - Matraville
Sparkle Cupcakery - Surry Hills
La Macelleria - Bondi
The Artisan Butcher - Potts Point
Two Fat Butchers - Summer Hill
Quattro Formaggi Deli - Multi Outlets
The Stinking Bishops - Newtown
Paesanella Cheese - Marrickville
Vanilla Cheese - Marrickville

05. Perfect Partners



1.

CBD/Inner City

Asian Grocery

- Ashfield Asian Supermarket
- Auburn Supermarket
- Leung Cheung Grocery
- Yuk Hing Supermarket
- Hak Seng Asian Groceries - Cabramatta
- Tong Li Supermarket – Ashfield
- Nam Hung Asian Grocery Marrickville
- Sing Kee Asian Grocery
- Magic Asia – Westfield Hornsby
- Hai Fa Asian – Liverpool
- Madam Hoo Asian Grocery – Castle Hill
- Myun Dog Asian – Balgowlah
- Randwick Oriental Supermarket

Fresh Food



Thank you

Our vision and project collaboration through the development process ensures success.

Angela Bonnefin

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