582 and 582a Old Northern Rd, Dural

Stage 1 Report: Retail Demand Assessment

Prepared for Centaran Holdings Pty Ltd

Draft Progress Report – November 2015

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This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

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EXECUTIVE SUMMARY

HillPDA has been commissioned by Centaran Holdings Pty Ltd (the Client) to undertake a Retail Demand Study (the Study), in order to provide Council with a better understanding of the quantum of retail floorspace that could be supported at 582 and 582A Old Northern Road, Dural (the Subject Site).

Retail Hierarchy Review (Chapter 2)

In terms of retail hierarchy, Round Corner, defined as a Town Centre in The Hills Shire Centres Direction (2009) is the largest centre in the Dural locality. Currently Round Corner is anchored by two supermarkets (Woolworths and ALDI), with plans to include a third supermarket of 2,500sqm in the future.

The analysis of competitive centres within proximity of Dural indicates that there are a number of larger higher order centres located to the south, east and west (e.g. Castle Hill, Rouse Hill, Baulkham Hills, Hornsby) offering a greater range of retail goods and services, but no comparably sized retail centres in the immediate locality or in the rural area to the north.

The Trade Area

The trade area for the proposed development at the Subject Site has been defined to include the suburb of Galston and parts of Glenhaven, Middle Dural, Kenthurst, Annangrove, Dural and Middle Dural. The trade area is bounded to the south by Georges Creek and encompasses the southern portion of Dural. The MTA contains approximately 22,150 people and is expected to grow strongly to almost 35,400 by 2031.

The People of the MTA

Older couples, families and retirees make up a large percentage of people living in MTA. In addition to this residents are typically wealthier. In retail terms higher levels of affluence lead to greater levels of discretionary spending and greater demand for retail floorspace as a result.

Shopfront Floorspace Demand and Supply

Currently there is sufficient demand for almost 26,850sqm of shopfront floorspace within the MTA. This is expected to increase to over 47,100sqm by 2031.

There is currently an under provision of supermarket floorspace at around 2,800sqm. Over time this undersupply of floorspace will further increase with population growth (i.e. to 9,189sqm by 2031). As such the proposed development at the Subject Site which will include a 2,000sqm supermarket will contribute to meeting this demand for additional supermarket floorspace.

In the event that a supermarket of 2,500sqm proceeds at the planned Round Corner Neighbourhood Centre and a full line supermarket of 4,200sqm proceeds at 268-276 New Line Road, there will still be sufficient demand for a further supermarket of up to 2,500qm by 2031. On this basis there is adequate demand to support a supermarket of 2,000sqm at the Subject Site with and without the supermarkets proceeding at Round Corner Neighbourhood Centre and New Line Road Dural.

In terms of the shopfront floorspace there is currently an undersupply of over 6,065sqm in the MTA, increasing to over 23,500sqm in 2031. Thus there are opportunities for the MTA to expand its shopfront floorspace with complementary uses.

1 INTRODUCTION

HillPDA has been commissioned by Centaran Holdings Pty Ltd (the Client) to undertake a Retail Demand Study (the Study), in order to provide Council with a better understanding of the quantum of retail floorspace that could be supported at 582 and 582A Old Northern Road, Dural (the Subject Site).

The Subject Site

The Subject Site is zoned RU6 Transition and comprises of two lots, namely Lot 2 DP 565718 (i.e. 582 Old Northern Road, Dural) and Lot 1 DP 656034 (i.e. 582A Old Northern Road, Dural). The Subject Site has a site area of 1.8ha and is bound by rural properties to the north, Old Northern Road to the east and south and Derriwong Road to west.

582 Old Northern Road, Dural is largely undeveloped vacant land and currently comprises Sydney Timber Mill, an operational timber mill with various associated sheds, a warehouse and building structures. The adjoining site at 582A accommodates a single storey dwelling (used as a home business). The Subject Site is heavily vegetated and fronts Old Northern Road for some 215m and Derriwong Road for some 175m.

Figure 1 - Aerial View of Subject Site

Source: Sixviewer

The Subject Site is strategically located within close proximity to the local town centre, Round Corner Dural (some 900m west of the Subject Site).

A provision of bulky goods and industrial uses is provided immediately to the west of the Subject Site, with rural properties to north and south. A petrol station and low density residential adjoins the Subject Site to the west.

The Planning Proposal

The Client is proposing a neighbourhood centre, inclusive of a supermarket of up to 2,000sqm on the Subject Site to cater for the regular shopping and commercial needs of the future residents at Dural.

The Brief

HillPDA was engaged by the Client to undertake a Retail Demand Study to understand the sustainability of retail and commercial floorspace as proposed at the Subject Site.

The principal objectives of the Study are to:

- Consider the viability of the proposed uplift in commercial and retail floorspace as proposed at the Subject Site, particularly given other retail centres of influence (e.g. Dural Town Centre);
- Provide recommendations on the extent to which the proposed land use options accord with the objectives of relevant land and Subregion planning directions and policies; and
- Provide advice on the sustainability of proposed retail and commercial options over a 2, 5 and 10 year period, given forecast dwellings and expected population growth.

The Study Structure

To address the requirements of the project brief, the Study is structured in the following manner:

- Chapter 2 provides a review of competitive retail facilities around the Subject Site to understand the extent of existing and planned future retail provision, identify any deficiencies in provision and to inform the demand and supply assessment undertaken at a subsequent stage of the Study;
- Chapter 3 defines a trade area for Subject Site based on the amount of retail floorspace proposed and in view of the competitive retail environment identified in the previous Chapter. Analysis of residents in this trade area is undertaken. Forecasts retail expenditure within the trade area is also

determined based on residents to determine the level of demand for retail floorspace within the trade area.

2 COMPETITIVE RETAIL ENVIRONMENT

This Chapter examines the retail hierarchy in the locality to determine the extent of existing and planned future retail provision including the size and characteristics of centres of influence. Understanding the extent of existing provision is also crucial in quantifying the economic impacts which may eventuate from the proposed development.

The information within this Chapter has been sourced from previous Hill PDA reports including the Baulkham Hills Retail Floorspace and Demand Analysis (December 2008), the Property Council of Australia's Shopping Centres Directory (2011/2012), Shopping Centre News and other consultant studies where indicated (including the Dural Economic Impact Report prepared by LocationIQ in May 2015).

Retail Trends

Over the past three decades significant changes have occurred in the retail industry such as the introduction of new technologies, the ageing of the population, increased female participation in the workplace and changing consumer preferences. These changes have placed increased pressure on many existing retail centres to either adapt or lose market share.

In the 1980s, Australian retail floorspace totalled approximately 1.8sqm per person (excluding commercial space and automotive retailing), which was roughly divided into equal components of regional, district and neighbourhood/local centres. Today we have around 2.2sqm per capita due to increasing affluence and consumerism.

In particular economic rationalism from 1991 to 2006 resulted in considerable growth in living standards and an increase in household income disparity. During this period retail spend per person grew at almost 2% per annum in real terms. Families became typically cash-rich/time-poor or time-rich/cash-poor. Very few families were both time-rich/cash-rich, providing interesting challenges for the retail industry.

Population growth, rising real disposable incomes and innovation and change within the retail industry have underpinned a rapid increase in the supply of retail floorspace throughout Australia. Population growth and increasing levels of disposable income have provided the means to support new retail development, but it is the innovative nature of the industry itself that has generated major increases in more and larger centres.

Without a doubt the ‘Global Financial Crisis’ had an impact on the Australian retail property market. The period from late 2007 to the present has been characterised by weaker consumer sentiment and poor leasing and investment markets (i.e. weak income and capital returns). This trend was common to most commercial markets nationwide.

Retail spend per capita has stagnated since 2006 due to a combination of factors including the credit squeeze, a propensity for households to save more and reduce debt, a strong Australian dollar, relatively high interest rates compared to our trading partners and reduced job certainties.

Also the rise of internet shopping is providing some interesting challenges for the retail industry. Whilst this market is relatively small at around 6% of total retail sales it is expected to increase to as high as 10% to 15% over the next two decades.

Whilst total retail spend per capita has remained flat over recent years, supermarket and grocery spend has observed an increase. Turnover in food and supermarket spend has seen an increase of 2.5% over the period of 2012 to 2013, reflecting the higher spend on basics.

The long term trends of rising affluence, consumerism and technological change are likely to ensure that retail expenditure will continue to increase over the long term owing to real growth in retail spend per capita. The current economic climate of low consumer sentiment is viewed as a short term condition rather than a long term one. In the future it is inevitable that there will be periods of economic growth and adjustment.

Retail Hierarchy

The table below identifies the role and characteristics of centres surrounding South Dural in order to provide an understanding of the competitive context within which it is located. This is based on the Draft North West and North Subregional Strategies and The Hills Shire Centres Direction (2008). Note that the definition of some centres, such as Round Corner, differs between Subregional Strategies and Council’s Centres Direction.

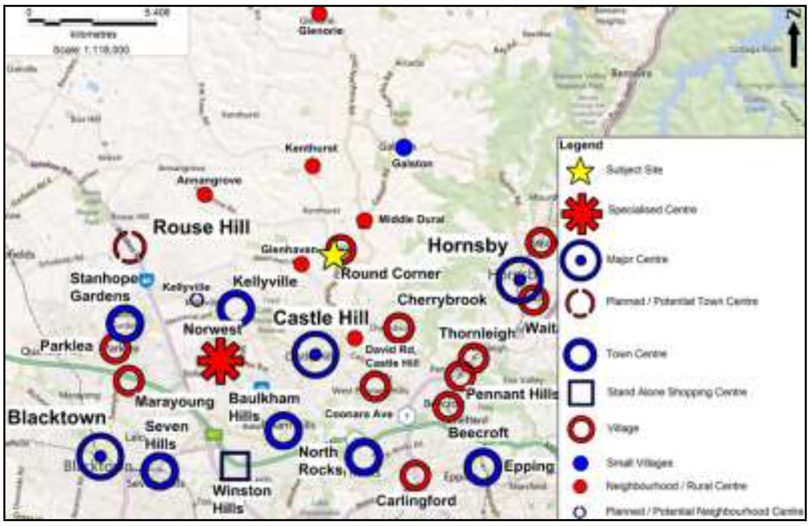
Table 1 - Competitive Retail Context

Typology		Centres
Draft Subregional Strategies	The Hills Shire Centres Direction	
Specialised Centre	Specialised Centre	Norwest
Major Centre	Major Centre	Castle Hill
Planned Major Centre	Planned/ Potential Town Centre	Rouse Hill
Town Centre	Town Centre	Baulkham Hills
Standalone Shopping Centre	Standalone Shopping Centre	Winston Hills
Village	Town Centre	Round Corner, Wrights Road Kellyville
	N/A	Cherrybrook
Small Villages	Village Centre	Coonara Ave West Pennant Hills
N/A		Knightsbridge
Small Villages	N/A	Galston
Neighbourhood Centres	Planned/ Potential Neighbourhood Centre	Kellyville/ Windsor Road
	Neighbourhood/ Rural Centre	Annangrove, Dural/ Middle Dural, Glenorie, Glenhaven, Kenthurst, Wisemans Ferry
	N/A	David Road Castle Hill

Source: Draft North West and North Subregional Strategies, NSW Department of Planning and Infrastructure (2007), The Hills Shire Centres Direction (2009)

The location of these centres in relation to the Subject Site is shown in the following map. A brief outline of the above centres is provided in the following sections of this Chapter.

Figure 2 - Competitive Retail Context



Source: Map produced by Hill PDA using MapInfo 11.0 software and Microsoft Bing (c) 2011 Microsoft Corporation

Norwest Specialised Centre

Norwest

Norwest is defined as a specialised centre in The Hills Shire Centres Direction and the Draft North West Subregional Strategy. Norwest is a large business park which accommodates over 400 firms[1]. The business park is located approximately 9km southwest of the Subject Site. Norwest Business Park contains a diverse range of retail, this includes: Norwest Marketown Shopping Centre, Circa Retail Shopping Centre, Norwest Homemaker Centre (a specialised bulky goods centre) in the north west of the site and a number of scattered retail premises.

The Norwest Marketown Shopping Centre is located in the middle of the business park around 9km from the Subject Site. The shopping centre has 11,500sqm of retail floorspace including a Coles supermarket of 4,300sqm and 45 specialty stores. The centre serves the local workers of the business park, the local residential population of Bella Vista and other users of the park such as the congregation of the Hillsong Church.

The Circa Retail Shopping Centre located at the southern end of the Norwest Business Park next door to the private hospital, is situated

[1] Draft Adopted Local Strategy, 2008

around 12km from the Subject Site. It has a retail floorspace area of 5,200sqm[2] and is anchored by a 3,045sqm Woolworths supermarket.

Major Centres

Castle Hill

Castle Hill is located approximately 5.5km to the south of the Subject Site and directly accessible from it via Old Northern Road. It is described as a Major Centre under The Hills Shire Centres Direction and the Draft North West Subregional Strategy. Castle Hill is a popular destination for food, clothing, small personal and household goods shopping and entertainment.

The QIC owned Castle Towers Shopping Centre is the major retail anchor of Castle Hill, with some 100,000sqm GLA floorspace[3] making it one of the largest shopping centres in the North-West sector. It has an extended primary trade area for comparative goods shopping that covers The Hills Shire and the suburbs of Cherrybrook and West Pennant Hills. Castle Towers consists of six majors including David Jones, Myer, Kmart, Target, Coles and Aldi. In 2014 Castle Towers had a reported annual turnover of $718.3m ($6,710/sqm), ranking it 13 out of 83 similar sized centres in Australia that year[4].

The QIC owned Castle Mall Shopping Centre located at 279 Old Northern Road and is a much smaller centre than Castle Towers. Castle Mall has 7,623sqm GLA retail floorspace and is anchored by Franklins (1,821sqm) and Trade Secret (2,265sqm)[5].

Planned Major Centres

Rouse Hill (Rouse Hill Town Centre)

The Rouse Hill Town Centre has an area of some 69,000sqm GLA and is located approximately 14km west of the Subject Site. It is anchored by Big W (8,560 sqm), Target (6,820sqm), Woolworths (4,610sqm) and Coles (4,120 sqm). In addition Rouse Hill includes JB Hi-fi, Best & Less, Bing Lee and 213 speciality shops. In 2015 the centre had a reported annual turnover of $394.5m ($7,077/sqm), ranking it 54 out of 82 similar sized centres in Australia that year (centres of more than 45,000sqm)[6].

[2] Source: PCA Shopping Centres Directory (2015)
[3] Source: PCA Shopping Centres Directory (2015)
[4] Source: Shopping Centre News Big Guns (2015)
[5] Source: PCA Shopping Centres Directory (2015)
[6] Source: Shopping Centre News Big Guns (2014)

Rouse Hill Town Centre has been described as the benchmark for new shopping centres and is an "outstanding success which provides a model centre for the future"[7]. The centre's design is based on "new urbanism" principles and return of main street theme. There is a great amount of population growth expected in the North-West sector and as a result the centre is likely to improve its performance into the future.

Town Centres

Dural Town Centre

Dural Town Centre is located approximately 1.5km to the west of the Subject Site. Dural Mall provides the majority of retail floorspace in the town centre and is anchored by Woolworths and Aldi supermarkets as well as 21 specialty stores. Surrounding the Mall is a further 70 specialty shops.

Baulkham Hills

Baulkham Hills is around 9.6km south of the Subject Site and contains a range of enclosed shopping centres including Stockland Shopping Centre, a small shopping centre on Old Northern Road, and two small shopping centres on Windsor Road.

Baulkham Hills is dominated by the Stockland Shopping Centre which provides some 17,355sqm GLA of retail floorspace. The centre is currently anchored by Woolworths (3,855sqm), Coles (3,034sqm) and ALDI (1,429sqm), and supported by 68 speciality stores (9,037sqm). Stockland Shopping Centre had a reported turnover of $145.1m in 2014, ranking it 13 out of 133 similar sized centres in Australia[8].

Outside of Stockland, retail predominantly fronts Old Northern Road in the form of strip shops and arcades. The west side of Old Northern Road between Stockland and Windsor Road appears to be performing poorly with 6 of the 27 shops vacant at the time of Hill PDA's 2008 survey, with a further 11 shopfronts being used by non-retail commercial premises such as home lenders, solicitors and real estate agents[9].

On the east side of Old Northern Road near the intersection of Windsor Road is a group of 10 shops including a mini-grocery store. There were no vacancies at the time of Hill PDA's 2008 survey.

[7] Source: Shopping Centre News (2008)
[8] Source: Shopping Centre News Mini Guns (2011)
[9] Source: The Hills Shire Retail Floorspace Demand Analysis, Hill PDA (2008)

The west side of Windsor Road has 17 shops, of which a number of the them are bulky goods including a 450sqm lighting store, two large computer stores and a 300sqm bedding store. There were also several commercial premises (including three real estate agents and a funeral director) and two vacancies at the time of Hill PDA's 2008 survey.

Finally there are several shops fronting Olive Street and Windsor Road south of Stockland. This includes a drive-in liquor store and KFC restaurant.

Wrights Road, Kellyville

The 10,200sqm Wrights Road centre is located approximately 8km southwest of the Subject Site. It is identified as a Town Centre in The Hills Shire Centres Direction and as a Village Centre in the Draft North West Regional Strategy. The centre is anchored by three supermarkets, Coles (3,837sqm) and Woolworths (4,450sqm), Aldi (1,500sqm) and includes a further 20 speciality stores.

The centre serves the surrounding community of the Kellyville/Rouse Hill Release Area providing for their weekly shopping and service needs. The centre appears to be trading well with most expenditure captured from the suburb of Kellyville.

Winston Hills

The Winston Hills Mall is defined as a standalone centre under The Hills Shire Centres Direction and the Draft North-West Subregional Strategy. Winston Hills Shopping Mall is located on Caroline Chisholm Drive approximately 13km from the Subject Site.

The 24,911sqm Mall is anchored by Big W (7,858sqm), Woolworths (3,859sqm), Coles (3,556sqm), Aldi (1,305sqm) and supported by 74 speciality stores (8,042sqm). The Mall had a reported turnover of $227.4m ($9,807/sqm) in 2014[10].

Village Centres

Knightsbridge

Knightsbridge is defined as a Village Centre in The Hills Shire Centres Direction but is not identified in the Draft North West Subregional Strategy. This centre is located around 6km southwest or a 10 minute

[10] Source: Shopping Centre News Little Guns (2011)

drivetime from the Subject Site[11]. It is a convenience shopping focused centre serving the surrounding residential area. It provides some 1,750sqm of retail shopfront floorspace.

Cherrybrook

Cherrybrook is located around a 6km or 11 minute drive[12] from the Subject Site to the southeast in Hornsby LGA. It is identified as a Village Centre in the Draft North Subregional Strategy.

Cherrybrook Village Shopping Centre is owned by Mirvac and provides approximately 9,500sqm of shopfront floorspace including a Woolworths supermarket of 3,832sqm and 54 other tenancies[13]. The shopping centre had a recorded turnover of $115.0m in 2014/2015 which equates to $9,495/sqm. This ranks the centre 32nd nationally out of the 133 similar sized centres in Australia (of between 6,000sqm and 20,000sqm floorspace) and is indicative of a well performing centre.

Coonara Ave, West Pennant Hills

This centre is defined as a Village Centre in The Hills Shire Centres Direction. It is situated 8km south of the Subject Site. The centre contains 15 retail units providing 2,430sqm of floorspace, with a little over half of this (52%) accounted for by a Woolworths Metro supermarket[14]. The centre functions predominately as a provider of convenience shopping for a localised catchment. It had no vacancies at the time of the Hill PDA floorspace survey in 2008 indicating a healthy trading performance.

Galston

Galston comprises a Small Village Centre (as defined in the Draft North Subregional Strategy) fronting Galston Road approximately 7km northeast of the Subject Site[15]. It is situated in Hornsby LGA. Retail provision comprises a strip shopping parade anchored by IGA[16]. The centre serves residents in the surrounding rural area particularly those to the north.

[11] Source: Googlemaps
[12] Source: Googlemaps
[13] Source: PCA Shopping Centres Directory (2015)
[14] Source: The Hills Shire Retail Floorspace and Demand Analysis, Hill PDA (December 2008)
[15] Source: Googlemaps
[16] Source: Cordells

Neighbourhood/ Rural Centres

Dural/ Middle Dural

This neighbourhood centre provided 10 commercial units accounting for 1,160sqm of total floorspace at the time of Hill PDA's 2008 survey[17]. Note that this centre crosses the boundary of The Hills Shire and Hornsby LGAs and the floorspace survey refers only to the commercial units in The Hills Shire (west of Old Northern Road).

Other uses located in Hornsby LGA (east of Old Northern Road) include Dural Medical Centre. This centre serves the convenience shopping needs of the local rural residential community. It was deemed to be trading strongly at the time of the survey. Dural is situated 3km northeast of the Subject Site or a 5 minute drive[18].

Kenthurst

Kenthurst provides 1,220sqm of floorspace in 12 shopfront retail and non-retail units[19]. At the time of the Hill PDA survey (2008) the centre had full occupancy which implies that it is performing well. Retail provision in the centre serves the convenience needs of a localised rural catchment. It is located 5km[20] north of the Subject Site.

Glenhaven

This centre serves the convenience shopping needs of the surrounding residential population and the rural community located to its north. It provides 990sqm of retail floorspace in 7 units[21] and is located approximately 2km[22] southwest of the Subject Site. It was deemed to be performing its neighbourhood centre role well at the time of the Hill PDA survey (2008).

Annangrove

Annangrove provides for retail convenience needs for a localised rural catchment. It is located 8km northwest of the Subject Site or a 9 minute drive[23]. It comprises 9 retail units of 940sqm floorspace[24]. The centre was found to have a high proportion of vacancies (2

[17] Source: The Hills Shire Retail Floorspace and Demand Analysis, HillPDA (December 2008)
[18] Source: Googlemaps
[19] Source: The Hills Shire Retail Floorspace and Demand Analysis, HillPDA (December 2008)
[20] Source: Googlemaps
[21] Source: The Hills Shire Retail Floorspace and Demand Analysis, HillPDA (December 2008)
[22] Source: Googlemaps
[23] Source: Googlemaps
[24] Source: The Hills Shire Retail Floorspace and Demand Analysis, HillPDA (December 2008)

shopfronts) at the time of the Hill PDA survey in 2008, although this was attributed to the recent expansion of the centre at the time.

Glenorie

Glenorie is located 13km north from the Subject Site via Old Northern Road[25]. At the time of the 2008 Hill PDA survey it contained 25 retail and commercial units providing 2,020sqm of floorspace. Since the survey a Woolworths supermarket has opened in the south of the centre which provides a further 3,647sqm of retail floorspace[26]. The centre serves the convenience shopping needs of the surrounding resident population particularly those located to the north of it.

Windsor Road, Kellyville

The 4,890sqm Windsor Road centre[27] provides convenience retail (food, grocery and services) to the local community and to passing trade on Windsor Road. It is identified as a Planned/ Potential Neighbourhood Centre in The Hills Shire Centres Direction. The low vacancy rate and high degree of passing trade indicates the centre is performing well. It is situated approximately 8km southwest of the Subject Site.

David Road, Castle Hill

Retail provision in this centre, which is situated around 5km south of the Subject Site, is provided by the Oakhill Village Shopping Centre which provides around 1,350sqm GLA retail floorspace, including a small IGA supermarket[28]. It caters for the day to day shopping needs of a localised catchment comprising residents in the immediate residential area within which it is located.

Proposed Developments

There are number of proposed retail developments within the MTA which will compete to some degree with proposed retail at the Subject Site, which are describes as follows:

- Approximately 6,000sqm of retail and commercial have been rezoned at the planned Round Corner Neighbourhood Centre along Old Northern Road in Dural. The development is planned to

[25] Source: Googlemaps
[26] Source: Shopping Centre Investment Review, Urbis (December 2010)
[27] Source: The Hills Shire Retail Floorspace Demand Analysis, Hill PDA (2008)
[28] Source: PCA Shopping Centres Directory (2015)

include a supermarket of 2,500sqm and some 1,600sqm of specialty floorspace.

- In addition to the above Aldi is understood to be relocating to the Round Corner site and a Planning Proposal has been submitted to Council to provide a retail and commercial development at 286-274 Newline Road in Dural which will include a full line supermarket of 4,200sqm, 1,390sqm of speciality floorspace and 20,700sqm bulky goods floorspace as well as a range of commercial floorspace. A decision is yet to be determined and the likelihood and timing of this development is unknown.

3 DEMAND FOR RETAIL FLOORSPACE

This Chapter identifies the level of retail floorspace demand in the trade area which would be served by Planning Proposal.

Methodology to Determine Demand

The purpose of this Chapter is to quantify and compare demand to supply of retail floorspace within the trade areas.

The methodology used in forecasting demand is based on household expenditure modelling. This involves defining trade areas for retail provision at the Subject Site, analysing population growth, forecasting expenditure levels from current and future populations, estimating capture of expenditure, and determining subsequent demand for retail floorspace.

Furthermore the modelling considers the future population that will reside in the future South Dural release area.

Trade Area Identification

The trade area served by any retail centre is determined by the consideration of:

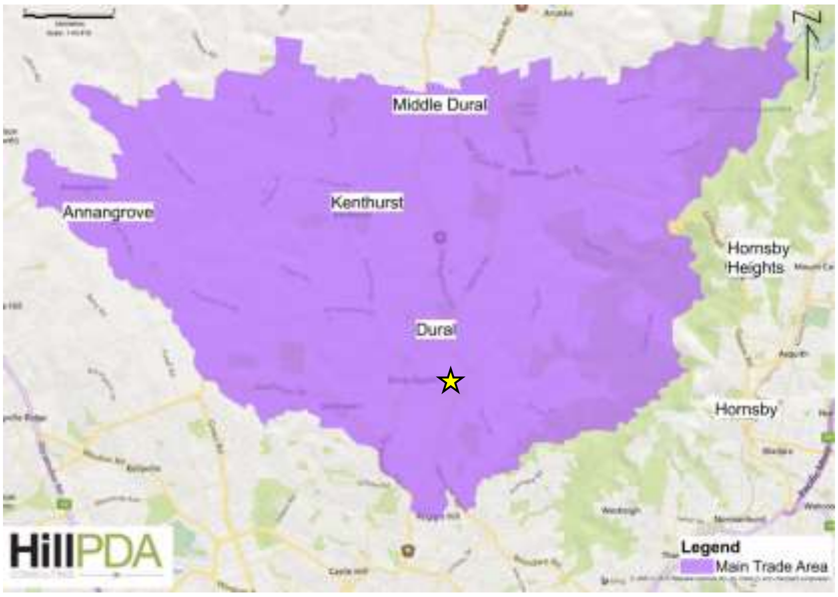
- The strength and attraction of the centre as determined by factors such as the composition, layout, ambience/atmosphere and car parking in the centre;
- Competitive retail centres, particularly their proximity to the subject centre and respective sizes, retail offer and attraction;
- The location and accessibility of the centre, including the available road and public transport network and travel times; and
- The presence or absence of physical barriers, such as rivers, railways, national parks and freeways.

Based on the retail hierarchy and competitive offer described above, the trade area for retail proposed at the Subject Site extends 10km north of the Subject Site to include the suburb of Galston and parts of Glenhaven, Middle Dural, Kenthurst, Annangrove, Dural and Middle Dural. The trade area is bounded to the south by Georges Creek and encompasses the southern portion of Dural.

The trade area for the proposed retail at the Subject Site aligns with the combined primary sectors (i.e. Primary North-West, Primary North-East and Primary South sectors) in the Dural Economic Impact Assessment prepared by LocationIQ in May 2015.

The extent of the trade area, referred to as the Main Trade Area (MTA) hereafter is depicted in the following map.

Figure 3 - MTA Trade Area



Source: Mapinfo Map produced by Hill PDA using MapInfo 12.0 software

Demographics of the Main Trade Area

Demand for retail floorspace is dependant not only upon the number of households in the MTA but also the socio-demographic characteristics of those households.

This Section examines the key demographic characteristics and trends recorded in the MTA benchmarked against The Hills Shire and the Sydney Greater Capital City Statistical Area (GCCSA)[29]. All the information provided in this Section is based on the 2011 ABS Census.

The results of this demographic analysis are included at Appendix 1 of this Study, however it should be noted that the key characteristics of the trade areas are:

- The MTA had a higher private dwelling occupancy rate (94%) than the Greater Sydney average (93%);
- The average household size in the MTA was 3.1 persons which was well above that for Greater Sydney (2.7);

[29] Greater Capital City Statistical Areas (GCCSAs) are geographical areas that are designed to represent the functional extent of each of the eight state and territory capital cities.

- The MTA has a higher representation of older residents compared to the Sydney GCCSA, recording a median age of 42 compared to 36 in Greater Sydney;
- The proportion of residents in the oldest birth cohorts (aged 60 years and above) in the MTA (22%) was well above the proportion recorded for Greater Sydney GCCSA (18%);
- The MTA had a higher proportion of homes being purchased or already owned (84%) than Greater Sydney (65%) which may indicate greater levels of affluence;
- Families dominated household types in the MTA accounting for 86% of all households compared to 73% in Greater Sydney;
- The highest proportion of family households in the MTA is "couples with children" (57% of all family households) which is significantly higher than Sydney GCCSA (49%);
- Households in the MTA are considerably wealthier with a weekly income of $2,124/week compared to $1,447/week for the Greater Sydney.

In summary residents in the MTA are likely to be older and wealthier than the average for the Greater Sydney average. In retail terms higher levels of affluence lead to greater levels of discretionary spending and greater demand for retail floorspace as a result.

Population Forecasts

Population forecast estimates for the suburbs that constitute the MTA have been sourced from Anysite 2014 data and Bureau of Transport Statistics (BTS).

A Planning Proposal has been submitted to Hornsby Shire Council which seeks to rezone land known as South Dural (bounded by New Line Road, Old Northern Road and Hastings Road, Dural and located in the MTA) to allow residential subdivision as well as schools and shops. The residential release area is projected to include approximately 2,940 residential dwellings in the following mix:

- Low rise (3-5 storey) residential flat buildings at 40-50 dwellings per hectare;
- Townhouses and terrace housing on small lots at 25 dwellings per hectare;
- Detached dwellings on average 450 – 600sqm lots at 10 – 15 dwellings per hectare; and

- Large lot housing along creeks and where there are remnant areas of vegetation at 2 dwellings per hectare.

Council resolved to investigate the rezoning and sent a planning proposal to the NSW Government seeking its position on the matter. The Government has issued a Gateway Determination, which authorises the rezoning investigation to begin.

For the purpose of this analysis we have assumed that the first dwellings are completed in 2019-20 and dwelling completions are around 300 per annum. Average occupancy rate is 3.1 persons per dwelling which is the average occupancy rate in the MTA at 2011 (ABS Census).

The table below shows an additional 13,011 residents living in the trade area from 2014 to 2029. This equates to a growth rate of 3.1% per annum.

Table 2 – Population Projections within the Trade Area (2014- 2029)

Year	2014	2019	2024	2029	Growth 14 - 31	% Growth 14 - 31
MTA	22,154	24,298	30,261	35,165	22,154	59%

Source: Anysite Data 2014, BTS, South Dural Planning Proposal (pp/1/2013), ABS Census 2011 and HillPDA

Forecast Household Expenditure

Expenditure modelling is based on population projections and real expenditure growth forecasts, to determine the level of demand for additional retail floorspace in the MTA over the 2014 to 2029 period. The forecast expenditure has been calculated separately for the PTA North West, PTA West and PTA South.

For the purposes of this Study, household expenditure was sourced from AnySite 2014 which provides household expenditure by broad commodity type.

Based on the above, and assuming population growth forecasts as discussed in previous section of this chapter, HillPDA has forecast household retail expenditure in the MTA as provided in the following table.

Table 3 - Total MTA Expenditure Forecast by Retail Store Type ($m2014)

YEAR	2014	2019	2024	2029
Supermarkets & Grocery Stores	99.8	115.0	150.5	187.6
Take-away Liquor Stores	18.6	21.5	28.1	35.0
Specialty Food Stores	11.3	13.0	17.0	21.2
Fast-Food Stores	17.6	20.3	26.6	33.1
Restaurants, Hotels and Clubs*	30.8	35.5	46.5	58.0
Department Stores	21.6	24.8	32.5	40.5
Apparel Stores	27.1	31.2	40.9	51.0
Bulky Goods Stores	42.5	49.0	64.1	79.9
Other Personal & Household Goods Retailing	44.4	51.1	66.9	83.4
Selected Personal Services**	11.3	13.1	17.1	21.3
Total MTA Retailing	**325.0**	374.6	490.4	610.9

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)
**Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos
Forecast assumes 1.0% real growth in real retail spend per capita per annum which is based on historical trends.

The MTA generated approximately $325.0m of retail expenditure in 2014. $99.8m or 30.7% is attributable to supermarket and grocery store expenditure. Over the period to 2029 total retail expenditure generated is forecast to increase to $611m as a result of population and expenditure growth.

However, of total retail expenditure generated by residents of the trade areas, only a proportion would be captured by retail facilities within the MTA.

Future Shopfront Floorspace Supply and Demand

Demand for retail floorspace is calculated by applying target turnover rates (or industry benchmarks) to the total retail spend generated by residents of the MTA. As discussed above the MTA would not capture the entirety of potential retail expenditure from residents within the MTA as residents travel to higher order centres such as Castle Hill Towers and Rouse Hills to undertake leisure shopping, comparison and specialised shopping.

As such HillPDA has applied varying retail capture rates (as shown in the following table) to understand the amount of retail spend that would be retained by retail provision within the MTA (not just retail provision at the Subject Site). The assumed capture rates are based on the following assumptions:

- The MTA contains no higher order centres above that of the Round Corner Town Centre;
- Due to limited provision, centres in the MTA would not capture department store or bulky goods expenditure; and
- The MTA will capture limited apparel spend due to a few existing retailers.

We also anticipate that additional demand for retail floorspace and shop front space would be generated and occupied by:

- Non-retailers (such banks, real estate agents, travel agents, medical services, etc.) – say 20%; and
- A vacancy factor of around 5%.

Table 4 – Floorspace Demand (2014- 2029) by Store Type (sqm GLA)

Store Type	Target Rate***	Capture Rate#	2014	2019	2024	2029
Supermarkets & Grocery Stores	10,500	83%	8,427	9,475	12,096	14,700
Take-away Liquor Stores	12,000	83%	1,376	1,547	1,975	2,400
Specialty Food Stores	8,000	83%	1,252	1,407	1,797	2,183
Fast-Food Stores	8,000	60%	1,419	1,595	2,037	2,475
Restaurants, Hotels and Clubs*	5,000	60%	3,978	4,473	5,710	6,939
Department Stores	3,600	0%	-	-	-	-
Apparel Stores	6,000	15%	728	819	1,046	1,271
Bulky Goods Stores	3,700	0%	-	-	-	-
Other Personal & Household Goods Stores	4,900	40%	3,894	4,378	5,589	6,792
Selected Personal Services**	3,500	60%	2,091	2,351	3,002	3,648
Total Retailing	7,642	59%	23,165	26,045	33,251	40,407
Commercial Floorspace (20%)			2,948	3,314	4,231	5,141
Vacancies (5%)			737	828	1,058	1,285
Total Shop Front Floorspace Demand			**26,849**	**30,187**	**38,540**	**46,834**

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)
** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos
*** Source: Various including ABS Retail Survey 1998-99 indexed to 2011 dollars, Shopping Centre News, Urbis Retail Averages, various consultancy studies and Hill PDA research. Target turnover levels are expected to increase at a rate of 0.6% per annum above the CPI rate in line with the historic trend.
# An allowance is made for a further 7.5% of turnover to come from residents beyond the MTA and workers in the localities.

As shown in the table above, there is demand for 23,165sqm of retail floorspace within the MTA. Over the period to 2029 this is expected to increase to 40,400qm, representing an increase of 17,242sqm or 74%.

Over a third (36%) of the growth in retail floorspace demand over the period (6,362sqm) would relate to additional supermarket and groceries floorspace. Currently there is demand for 8,427sqm increasing to around 14,700sqm by 2029.

There is currently demand for almost 2,950sqm of non-retail floorspace within the MTA, increasing to more than 5,000sqm by 2029. Factoring in non-retail uses and a vacancy factor of 5% gives a total demand for shopfront floorspace of 26,850sqm in 2014. This is estimated to increase to almost 46,800sqm by 2029.

Retail Floorspace Supply versus Demand

As identified in Chapter 2, the MTA provided approximately 5,600sqm of supermarket and grocery floorspace. With this factored into the supply side, there is currently an under provision of supermarket floorspace at around 2,800sqm. Over time this will further increase with population growth, from an undersupply of supermarket floorspace of some 6,500sqm in 2024 to 9,100sqm by 2029. As such the proposed development at the Subject Site which will include a 2,000sqm supermarket will contribute to meeting this demand for additional supermarket floorspace.

In the event that a supermarket of 2,500sqm proceeds at the planned Round Corner Neighbourhood Centre and a full line supermarket of 4,200sqm proceeds at 268-276 New Line Road, there will still be sufficient demand for a further supermarket of up to 2,400qm by 2029. On this basis there is adequate demand to support a supermarket of 2,000sqm at the Subject Site with and without the supermarkets proceeding at Round Corner Neighbourhood Centre and New Line Road Dural.

Table 5 – Retail Floorspace Supply vs Demand 2014-2029

	2014	2019	2024	2029
Supermarket Retail Demand	8,427	9,475	12,096	14,700
Supermarket Retail Supply *	5,600	5,600	5,600	5,600
Over/Undersupply**	2,827	3,875	6,496	9,100
Shopfront Retail Demand	23,165	26,045	33,251	40,407
Shopfront Retail Supply	17,100	17,100	17,100	17,100
Over/Undersupply**	6,065	8,945	16,151	23,307

Source: HillPDA; *This does not include proposed supermarkets at 268-276 New Line Road and the Round Corner Neighbourhood Centre **Red Text indicates oversupply, Blue Text indicates undersupply.

In terms of the shopfront floorspace there is currently an undersupply of over 6,000sqm in the MTA, increasing to 23,300sqm by 2029 (without further additions to supply). Thus there are opportunities for the MTA to expand its shopfront floorspace with complementary uses.

APPENDIX A: DEMOGRAPHIC ANALYSIS

This Appendix sets out the results of the demographic analysis undertaken to inform this Study. It is based on information derived from the 2011 ABS Census.

Table 6 - Trade Area Population and Dwelling Characteristics (2011)

	MTA	Greater Sydney
Total Private Dwellings	6,406	1,640,199
Occupied Private Dwellings	6,024	1,521,398
Occupied Private Dwellings (%)	94.0%	92.8%
Average Household Size	3.1	2.7
Age Distribution		
0-14	18.9%	19.2%
15-29	19.2%	21.0%
30-44	15.8%	22.5%
45-59	23.7%	19.2%
60-74	15.6%	11.9%
75+	6.8%	6.1%
Median Age	**42**	**36**

Source: ABS Community Profiles (2011). MTA includes suburbs Dural (Hornsby NSW); Glenhaven; Kenthurst and Middle Dural

Table 7 - Trade Area Household Characteristics (2011)

	MTA	Greater Sydney
Home Ownership		
Owned or Being Purchased	84.2%	65.2%
Rented	11.7%	31.6%
Other/Not Stated	4.1%	3.2%
Household Structure		
Family Households	85.9%	73.1%
Lone Person Households	13.2%	22.6%

Group Households	1.0%	4.3%
Family Type		
Couple family w. children	56.6%	48.9%
Couple family w/o children	32.9%	33.5%
One parent family	9.8%	15.7%
Other family	0.7%	1.9%
Dwelling Type		
Separate house	88.5%	60.9%
Townhouse	7.2%	12.8%
Flat-Unit-Apartment	2.9%	25.8%
Other dwelling	1.3%	0.5%

Source: ABS Community Profiles (2011). MTA includes suburbs Dural (Hornsby NSW); Glenhaven; Kenthurst and Middle Dural

Table 8 - Income Characteristics (2011)

	MTA	Greater Sydney
Weekly Household Income		
$0-$599	11.6%	18.2%
$600-$1,249	15.9%	21.2%
$1,250-$2,499	22.7%	26.6%
$2,500-$3,999	27.0%	18.2%
$4,000+	10.5%	5.5%
Partial income stated	10.3%	7.9%
All incomes not stated	1.9%	2.4%
Median Weekly Household Income	$2,124	$1,447

Source: ABS Community Profiles (2011). MTA includes suburbs Dural (Hornsby NSW); Glenhaven; Kenthurst and Middle Dural

Disclaimer

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4. This report and its attached appendices are based on estimates, assumptions and information provided by the Client or sourced and referenced from external sources by Hill PDA. While we endeavour to check these estimates, assumptions and information, no warranty is given in relation to their reliability, feasibility, accuracy or reasonableness. Hill PDA presents these estimates and assumptions as a basis for the Client's interpretation and analysis. With respect to forecasts, Hill PDA does not present them as results that will actually be achieved. Hill PDA relies upon the interpretation of the Client to judge for itself the likelihood of whether these projections can be achieved or not.

5. Due care has been taken to prepare the attached financial models from available information at the time of writing, however no responsibility can be or is accepted for errors or inaccuracies that may have occurred either with the programming or the resultant financial projections and their assumptions.

6. This report does not constitute a valuation of any property or interest in property. In preparing this report Hill PDA has relied upon information concerning the subject property and/or proposed development provided by the Client and Hill PDA has not independently verified this information except where noted in this report.

7. In relation to any valuation which is undertaken for a Managed Investment Scheme (as defined by the Managed Investments Act 1998) or for any lender that is subject to the provisions of the Managed Investments Act, the following clause applies:

   This valuation is prepared on the assumption that the lender or addressee as referred to in this valuation report (and no other) may rely on the valuation for mortgage finance purposes and the lender has complied with its own lending guidelines as well as prudent finance industry lending practices, and has considered all prudent aspects of credit risk for any potential borrower, including the borrower's ability to service and repay any mortgage loan. Further, the valuation is prepared on the assumption that the lender is providing mortgage financing at a conservative and prudent loan to value ratio.

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LEGEND

- COMMON OPEN SPACE
- PRIVATE OPEN SPACE
- ENVIRONMENTAL PROTECTION ZONE (EPZ)
- VEGETATION BUFFERE
- LANDSCAPE
- PEDESTRIAN PATH
- TREE TO BE REMOVED
- TREE TO BE RETAINED

1
-

LANDSCAPE AND TREE PRESERVATION PLAN
1:1000

ISSUE FOR SUBMISSION

N

C	20/05/2015	FOR SUBMISSION	WA
B	04/05/2015	FOR REVIEW	WA
A	20/04/2015	PRELIMINARY CONCEPT	WA

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DRIVAS PROPERTY GROUP

SUBDIVISION PROPOSAL

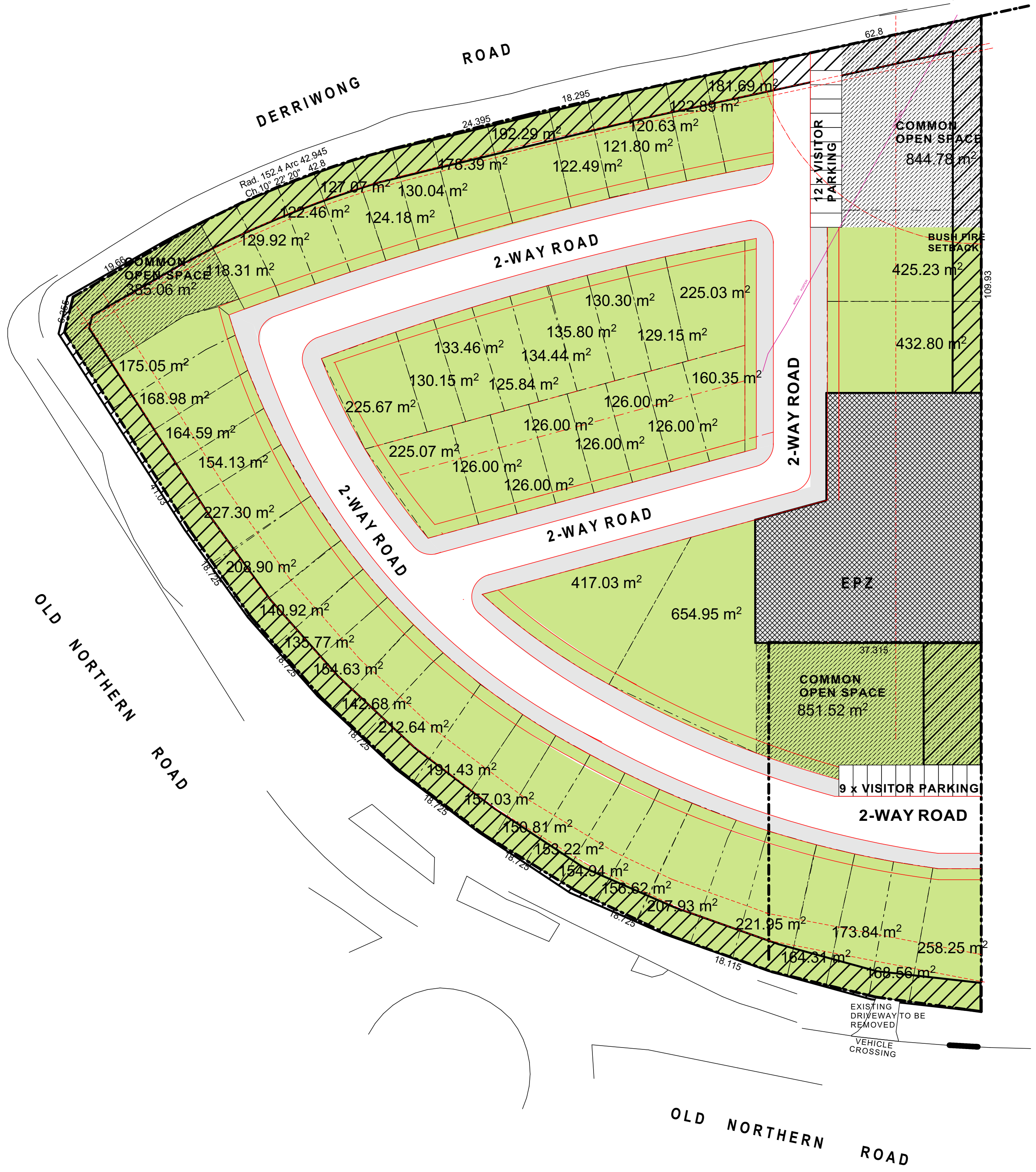
582 OLD NORTHERN ROAD
DURAL

Drawing Name
LANDSCAPE AND TREE PRESERVATION PLAN

Drawing Number
02

PP-616
DRAWN: WA
DATE: 20/05/2015
SCALE: 1:1000

C



LEGEND

PROPOSED LOT BOUNDARIES

LANDSCAPE

1

-

LOT LAYOUT

1:1000

ISSUE FOR SUBMISSION

C	20/05/2015	FOR SUBMISSION	WA
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582 OLD NORTHERN ROAD
DURAL

Drawing Name
LOT LAYOUT

Drawing Number
03

PP-616
DRAWN: WA
DATE: 20/05/2015
SCALE: 1:1000
C

DWELLING FOOTPRINT LEGEND:

A1	X 6	8m X 7m = 56m^2 (2 STOREY = ~112m^2) PRIVATE OPEN SPACE ALLOWANCE = 42m^2
A2	X 47	10m X 7m = 70m^2 (2 STOREY = 130~140m^2) PRIVATE OPEN SPACE ALLOWANCE = 42m^2
A3	X 4	10m X 10m = 100m^2 (2 STOREY = 150~170m^2) PRIVATE OPEN SPACE ALLOWANCE = 60m^2

BUILDING DENSITY

6 x 2.1 = 12.6 persons
47 x 2.7 = 126.9 persons
4 x 3.5 = 14 persons

LEGEND

- COMMON OPEN SPACE
- PRIVATE OPEN SPACE
- ENVIRONMENTAL PROTECTION ZONE (EPZ)
- VEGETATION BUFFERE
- LANDSCAPE
- PEDESTRIAN PATH
- TREE TO BE REMOVED
- TREE TO BE RETAINED

1 - SUBDIVISION 1:1000

ISSUE FOR SUBMISSION

C	20/05/2015	FOR SUBMISSION	WA
B	04/05/2015	FOR REVIEW	WA
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DRIVAS PROPERTY GROUP
SUBDIVISION PROPOSAL
582 OLD NORTHERN ROAD
DURAL

Drawing Name
SUBDIVISION PLAN

Drawing Number
04

PP-616
DRAWN: WA
DATE: 20/05/2015
SCALE: 1:1000
C

NOTES: BEARINGS SHOWN RELATE TO TRUE NORTH.

LIMITED BOUNDARY SURVEY MADE. IF ANY CONSTRUCTION IS INTENDED IN THE PROXIMITY OF THE BOUNDARIES IT IS RECOMMENDED THAT A FURTHER SURVEY BE REQUESTED FOR THE MARKING OF THE RELEVANT BOUNDARIES.

TREE SPREADS & TRUNK DIAMETERS SHOWN ARE DIAGRAMMATIC ONLY AND TREE HEIGHTS ARE ESTIMATED. IF ANY OF THESE ELEMENTS ARE CRITICAL TO DESIGN (IN PARTICULAR DRIPLINES) MORE SPECIFIC DETAILS SHOULD BE REQUESTED FOR ACCURATE LOCATION.

CONSTRUCTION WORKS MUST BE RELATED TO THE SITE BENCH MARK AND NOT LEVELS OF STRUCTURES SHOWN ON THE PLAN.

SYMBOLS REPRESENTING SERVICE PITS, POLES AND STREET FURNITURE ARE NOT TO SCALE.

PIT SIZE IS SHOWN AT GROUND LEVEL. PITS MAY BE LARGER BELOW THE SURFACE.

SERVICE LINES SHOWN ARE DIAGRAMMATIC ONLY AND DO NOT REPRESENT THE WIDTH AND NUMBER OF CABLES OR PIPES IN THE GROUND.

TREES NOTED "X" ARE INACCESSIBLE LOCATION IS APPROXIMATE

POSITION OF UNDERGROUND SERVICES PLOTTED FROM INFORMATION SUPPLIED BY THE RELEVANT AUTHORITIES AND MAY BE APPROXIMATE ONLY.

IT IS THE RESPONSIBILITY OF EACH CONTRACTOR AND/OR CONSULTANT TO CONTACT THE RELEVANT AUTHORITY AND/OR "Dial Before You Dig" (Phone 1100 Fax 1300 652 077) BEFORE COMMENCING ANY EXCAVATION.

THIS PLAN HAS BEEN CREATED AT A SCALE OF 1:200 AND MAY NOT BE SATISFACTORY FOR OTHER PURPOSES. THE ACCURACY OF ANY ENLARGEMENT OR OTHER REPRODUCTION MAY BE LESS THAN THAT OF THE ORIGINAL.

REV.	DATE	AMENDMENTS
B	1/4/2015	DETAIL AND LEVELS No. 582A ADDED (REF 76843)
A	9/2/2010	TREE DETAILS & LOCATIONS UPDATED

LEGEND

- ELECTRICITY PIT
- ELEC POLE WITH LIGHT
- ELECTRICITY POLE
- LIGHT POLE
- TRAFFIC SIGNAL
- GAS METER
- GAS VALVE
- POLE (UNSPECIFIED)
- PIT (UNSPECIFIED)
- MANHOLE (UNSPECIFIED)
- TELECOM PIT
- TELECOM PILLAR
- E UNDERGROUND ELECTRICITY
- E OVERHEAD POWER LINES
- G UNDERGROUND GAS
- S UNDERGROUND SEWER
- UNDERGROUND STORMWATER PIPE
- SW UNDERGROUND STORMWATER
- W UNDERGROUND WATER
- T TELECOMMUNICATIONS
- WATER METER
- WATER VALVE
- STOP VALVE
- HYDRANT
- STORMWATER GRATE
- STORMWATER MANHOLE
- STORMWATER PIT
- SEWER PIT
- SEWER MANHOLE
- SEWER MANHOLE
- BOLLARD
- SIGN

0 — 20
REDUCTION RATIO 1:200 @ B1

DATUM : AUSTRALIAN HEIGHT DATUM
CONTOUR INTERVAL : 0.25 METRE
ORIGIN OF LEVELS : S.S.M.71231 R.L.198.81 A.H.D.

RYGATE SURVEYORS
SURVEYING SINCE 1893
Rygate & Company Pty Limited
P.W. Rygate & West
ABN 61 001 204 897
a Suite 904 Level 9, 89 York St Sydney NSW 2000
p +61 2 9262 6800
f +61 2 9262 6843
e surveyors@rygate.com.au
w rygate.com.au

SUBDIVISION | STRATA PLANS | STRATUM SUBDIVISION | LEASE PLANS | TOPOGRAPHIC SURVEYS | GPS SURVEYS | 3D MODELLING | RACECOURSE DESIGN | PROJECT MANAGEMENT | SUN SHADOW DIAGRAMS

SURVEYOR	DRAWN	CHECKED	APPROVED
A.M.	S.K./D.K.	V.L.	G.J.F.

CLIENT: CENTARAN HOLDINGS PTY. LTD.
LOCALITY: DURAL
L.G.A.: BAULKHAM HILLS

PLAN

SHOWING DETAIL AND LEVELS
LOT 2 D.P.565718 & 1 D.P.656034
Nos. 582 & 582A OLD NORTHERN ROAD

REFERENCE No.	PLAN No.	DATE	SHEET No. 2 OF 2 SHEETS
75218	76843.dgn	1/2/2012	

NOTES: BEARINGS SHOWN RELATE TO TRUE NORTH.

LIMITED BOUNDARY SURVEY MADE. IF ANY CONSTRUCTION IS INTENDED IN THE PROXIMITY OF THE BOUNDARIES IT IS RECOMMENDED THAT A FURTHER SURVEY BE REQUESTED FOR THE MARKING OF THE RELEVANT BOUNDARIES.

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REV.	DATE	AMENDMENTS
B	1/4/2015	DETAIL AND LEVELS No. 582A ADDED (REF 76843)
A	9/2/2010	TREE DETAILS & LOCATIONS UPDATED

LEGEND

ELECTRICITY PIT
ELEC POLE WITH LIGHT
ELECTRICITY POLE
LIGHT POLE
TRAFFIC SIGNAL
GAS METER
GAS VALVE
POLE (UNSPECIFIED)
PIT (UNSPECIFIED)
MANHOLE (UNSPECIFIED)
TELECOM PIT
TELECOM PILLAR

E — UNDERGROUND ELECTRICITY
E — OVERHEAD POWER LINES
G — UNDERGROUND GAS
S — UNDERGROUND SEWER
UNDERGROUND STORMWATER PIPE
SW — UNDERGROUND STORMWATER
W — UNDERGROUND WATER
T — TELECOMMUNICATIONS

WATER METER
WATER VALVE
STOP VALVE
HYDRANT
STORMWATER GRATE
STORMWATER MANHOLE
STORMWATER PIT
SEWER PIT
SEWER MANHOLE
SEWER MANHOLE
BOLLARD
SIGN

0 — 20
REDUCTION RATIO 1:200 @ B1

DATUM : AUSTRALIAN HEIGHT DATUM
CONTOUR INTERVAL : 0.25 METRE
ORIGIN OF LEVELS : S.S.M.71231
R.L.198.81 A.H.D.

RYGATE SURVEYORS
SURVEYING SINCE 1893
Rygate & Company Pty Limited
P.W. Rygate & West
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p +61 2 9262 6800
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SUBDIVISION | STRATA PLANS | STRATUM SUBDIVISION | LEASE PLANS | TOPOGRAPHIC SURVEYS | GPS SURVEYS | 3D MODELLING | RACECOURSE DESIGN | PROJECT MANAGEMENT | SUN SHADOW DIAGRAMS

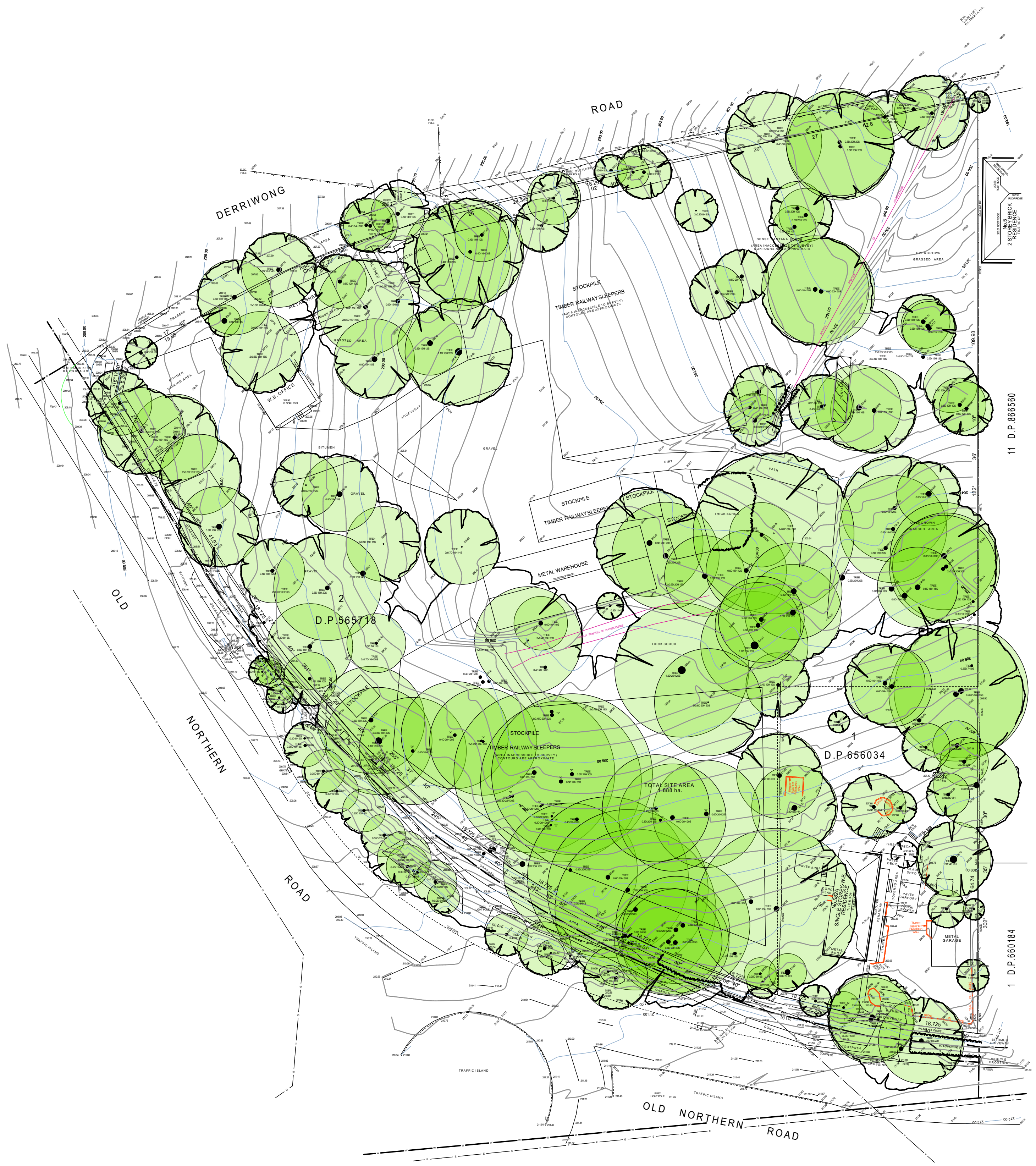
SURVEYOR	DRAWN	CHECKED	APPROVED
A.M.	S.K./D.K.	V.L.	G.J.F

CLIENT: CENTARAN HOLDINGS PTY. LTD.
LOCALITY: DURAL
L.G.A.: BAULKHAM HILLS

PLAN

SHOWING DETAIL AND LEVELS
LOT 2 D.P.565718 & 1 D.P.656034
Nos. 582 & 582A OLD NORTHERN ROAD

REFERENCE No.	PLAN No.	DATE	SHEET No. 1 OF 2 SHEETS
75218	76843.dgn	1/2/2012	



LEGEND

EXISTING TREES

1
-

EXISTING MATURE VEGETATION
1:1000

ISSUE FOR SUBMISSION

N

C	20/05/2015	FOR SUBMISSION	WA
B	04/05/2015	FOR REVIEW	WA
A	20/04/2015	PRELIMINARY CONCEPT	WA

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w: www.nuovodesignstudio.com.au

DRIVAS PROPERTY GROUP

SUBDIVISION PROPOSAL

582 OLD NORTHERN ROAD
DURAL

Drawing Name
EXISTING VEGETATION PLAN

Drawing Number
01

PP-616
DRAWN: WA
DATE: 21/05/2015
SCALE: 1:1000

C