



PLANNING PROPOSAL

Proposed amendment to Port Stephens Local Environmental Plan 2013

1519 Richardson Road, Salt Ash (Pauls Corner)

Version - Council Report

28 October 2014

Further Information

Strategic Planning

Port Stephens Council

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FILE NUMBERS

Council: PSC2014-01907
Department: To be determined at Gateway Determination

SUMMARY

Subject land: 1519 Richardson Road, Salt Ash (Pauls Corner)
Addresses: 1519 Richardson Road, Salt Ash Lot 20, DP 240103
1515 Richardson Road, Salt Ash Lot 23, DP 240103
3 Salt Ash Avenue, Salt Ash Lot 1, DP 158268
5 Salt Ash Avenue, Salt Ash Lot 6, DP 240103
7 Salt Ash Avenue, Salt Ash Lot 7, DP 240103
Proponent: Environment Property Services (EPS)
Landowner: George and Peter Boshev
Total Area: 1.96 Hectares
Existing Zoning: RU2 Rural Landscape
Existing Minimum Lot Size: AB2 – 20 Hectares
Proposed Zoning: B1 Neighbourhood Centre
Proposed Minimum Lot Size: No Minimum Lot Size
Proposed Height of Building: 9m
Proposed Clause: Restrict gross floor area of a single premises to 500m² and the total floor space of the development to 2,100m²

BACKGROUND

In June 2014, Council received a request to amend the Port Stephens Local Environmental Plan 2013 at 1519 Richardson Road, Raymond Terrace, known as 'Paul's Corner' (the subject site). The request was to amend the zoning from R2 Rural Landscape to B1 Neighbourhood Centre to cater for additional small scale retail, business and community uses for the local community and passing commuters.

An initial review of the Port Stephens Planning Strategy (PSPS) identified that the subject site as a 'Smaller Village Centre' whose demand for commercial floor space is forecast to increase by 450m² from the existing 1,800m². This increased demand would primarily be the result from increased vehicle movements along Richardson and Nelson Bay Roads.

A closer examination indicated that the existing floor space was not 1,800m² as detailed in the Port Stephens Commercial and Industrial Lands Study, but closer to 962m². This was the result of building overhangs (i.e. awnings) being calculated as leasable floor space and means that the justification for an additional 1,288m² already existed.

The PSPS assumed that the subject site could cater for an increase of 450m² under existing-use rights based on the recommendations of the Commercial and Industrial Lands Study. The Study stated that demand could easily be accommodated on the two lots which currently host the petrol station and other retail. These lots should constitute the extent of the centre (July 2010, p. 77).

A Planning Proposal was lodged with Council on 15 August 2014, accompanied by an Economic Impact Assessment (EIA) (**Attachment 1**). The EIA considered that an expanded centre of 2,500m², including approximately 2,162m² of retail floor area highlights that no centre would experience an impact greater than 1.1% and this is a very small loss that will be quickly won back in 12 months.

An Independent Review (**Attachment 2**) of the EIA generally agreed with the assumptions contained in the Assessment in relation to retail turnover, inflation and assumed growth rate

of daily traffic volumes (Macro Plan. 2014, p.2). However, the Independent Review identified an error in the calculations of the forecast traffic volumes, which resulted in an estimated demand closer to 1,870m², rather than 2,162m². The Proponent responded by extending its traffic forecasts to 2034, which lead to a revised 2,100m² (**Attachment 12**).

This demand cannot be accommodated on the current site, so the Proposal is seeking to replace the existing zoning over the current site and extend over the adjoining lot. This zoning will allow for a variety of commercial uses, such as a pharmacy, newsagent, liquor store or grocery store each with a single commercial premise no greater than 500m² and a combined floor space no greater than 2,100 m².

This request is considered to be reasonable, given that the Port Stephens Commercial and Industrial Lands Study estimated 2,250m² for the subject site, a difference of less than 150m² that is justified by the updated EIA that has been provided by the Proponent.

SITE

The Site totals 1.96Ha and is located on the north-eastern corner of Nelson Bay and Richardson Road, Salt Ash. The lots are legally described as Lot 1, DP 158268 and Lots 6, 7, 20 & 23, DP 240103.

Since the 1990's, the Site has operated as a service station, shops and restaurant, which consists of a petrol service station, groceries store, bakery and restaurant, butchers and takeaway, bottle shop and greengrocer with ancillary parking areas. These existing services cater for the local community and traffic along Nelson Bay and Richardson Roads.

Approximately half of the site is developed with commercial stores and petrol station, an on-site sewerage system, a gas storage facility and visitor car parking. The majority of Lots 7 and 23, DP 240103 are vacant managed land with Lot 7 containing the sites that contain on-site sewerage infrastructure.

Figure 1 – Aerial Map (p. 4) and **Figure 2 – Street Map** (p. 5) provide contextual illustrations of the Subject Site – 1519 Richardson Road, Salt Ash.

PART 1 – Objective of the proposed Local Environmental Plan

The objective of this Proposal is to enable the commercial expansion of the existing centre to cater for the identified increase in commercial floor space demand.

PART 2 – Explanation of the provisions to be included in proposed LEP

The objective of this Proposal will be achieved by:

- Amending the land zone map LZN_004 for the subject site to replace the Zone RU2 Rural Landscape with Zone B1 Neighbourhood Centre in accordance with (**Attachments 2 & 3**)
- Amending the lot size map LSZ_004 for the subject site to remove the Minimum Lot Size of AB2 -20Ha in accordance with (**Attachments 4 & 5**)
- Amending the additional permitted uses map CL1_004 for the subject site to include the additional permitted use of restricting single commercial premises to 500m² and total floor space to 2,100m² (**Attachments 5 & 6**)
- Amending the height of building map HOB_004 for the subject site to include 9m height of building limit (**Attachments 7 & 8**)
- Insert the following into Schedule 1 – Additional permitted uses:

XXXX Maximum gross floor area for single commercial premises and total commercial premises at Richardson Road, Salt Ash

1. This clause applies to land on the corner of Richardson Road and Salt Ash Avenue, Salt Ash, being Lot 1, DP 158268 and Lots 6, 7, 20 & 23, DP 240103
2. The objective of this clause is to ensure that the size and range of uses at the subject site are consistent with the hierarchy of centres within Port Stephens
3. Development consent must not be granted for the purpose of a single commercial premises on the site to which this clause applies unless the consent authority is satisfied that the gross floor area of the premises will not exceed 500m²
4. Development consent must not be granted for the purpose of commercial premise on the site to which this clause applies unless the consent authority is satisfied the combined gross floor area will not exceed 2,100m²

PART 3 – Justification for the Planning Proposal

SECTION A – Need for the Planning Proposal

Is the planning proposal a result of any strategic study or report?

This Proposal is consistent with the identification of the site as a smaller village centre within the Port Stephens Planning Strategy (PSPS), which broadly reflects the floor space forecast of 2,250m² provided by the Port Stephens Commercial and Industrial Lands Study.

The commercial floor space of 2,162m² sought by the Proposal was further supported by an Economic Impact Assessment (EIA) (**Attachment 1**). The EIA considered that an expanded centre of 2,500m², including approximately 2,162m² of retail floor area highlights that no centre would experience an impact greater than 1.1% and this is a very small loss that will be quickly won back in 12 months.

An Independent Review (**ATTACHMENT 3**) of the EIA generally agreed with the assumptions contained in the Assessment in relation to retail turnover, inflation and assumed growth rate of daily traffic volumes (JLL. 2014, p.2). However, the Independent Review identified an error in the calculations of the forecast traffic volumes, which resulted in an estimated demand closer to 1,870m² rather than the 2,162m². The Proponent responded by extending the traffic forecasts to 2024, a period of 20 years, which led to a revised demand forecast of 2,100m².

This request is considered to be reasonable, given that the Port Stephens Commercial and Industrial Lands Study estimated 2,250m² and the floor space limits of 500m² per commercial premises and 2,100m² in total will ensure that the Site maintains its position as a 'Smaller Village Centre' within the centres hierarchy.

Is the planning proposal the best means of achieving the objectives or intended outcomes, or is there a better way?

The Proposed can only be achieved through an amendment to the Port Stephens Local Environmental Plan 2013.

SECTION B – Relationship to Strategic Planning Framework

4. Is the planning proposal consistent with the objectives and actions contained within the applicable regional or sub-regional strategy (including the Sydney Metropolitan Strategy and exhibited draft strategies)?

Lower Hunter Regional Strategy

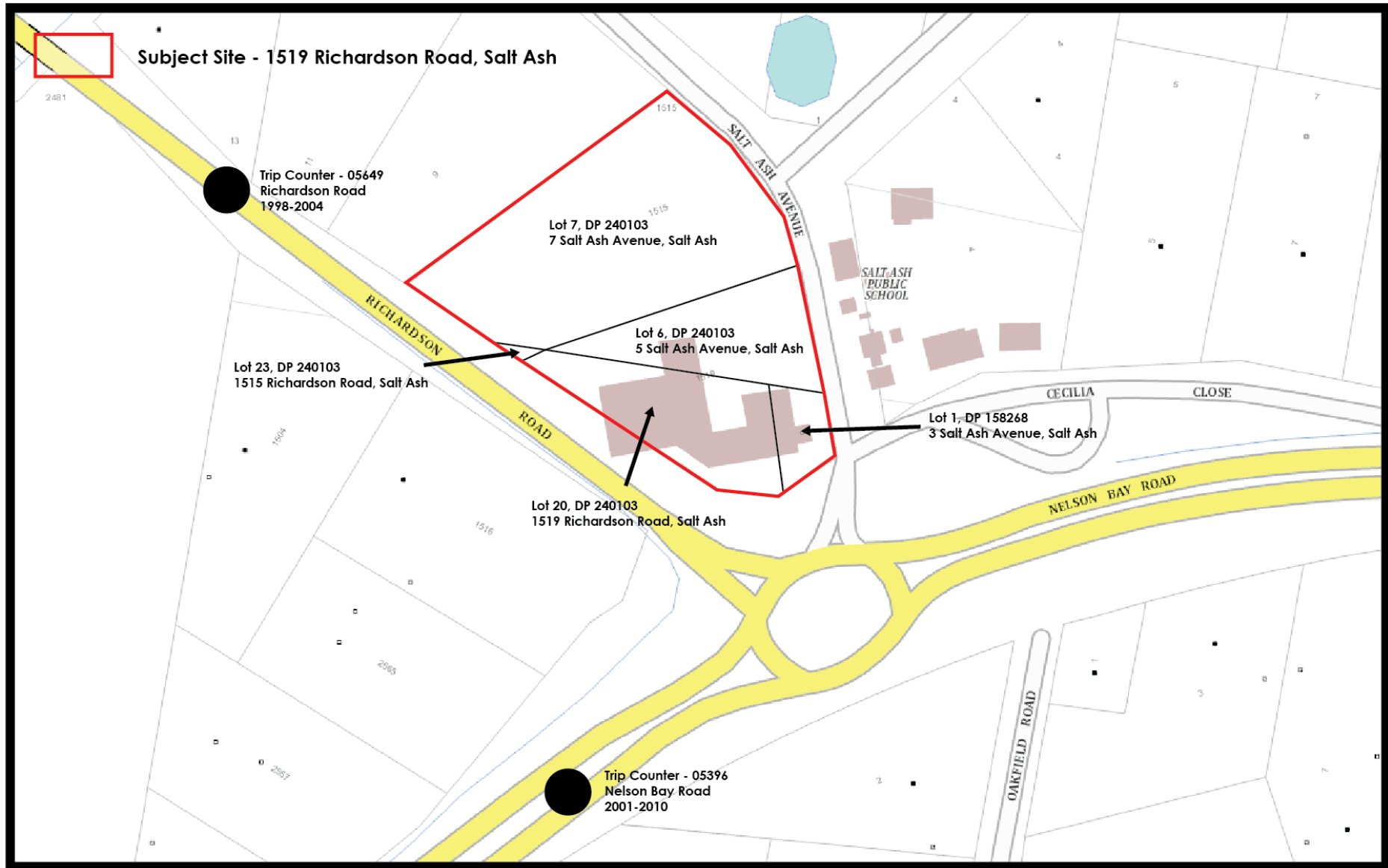
The Proposal is consistent with the poly-centric hierarchy employed by the Lower Hunter Regional Strategy. The identification of the subject site as a smaller village centre within the Port Stephens Planning Strategy (PSPS) is consistent with this approach, which is underpinned

FIGURE 1 – Aerial Map



Source: Six Maps. 2014, p. 6

FIGURE 2 – Street Map



Source: Six Maps. 2014, p. 6

by the Port Stephens Commercial and Industrial Lands Study. This Proposal does not undermine this hierarchy.

The Lower Hunter over the next 20 years: A Discussion Paper

The Lower Hunter over the next 20 years: A Discussion Paper aims to facilitate discussion to feed into the development of a new Lower Hunter Regional Strategy. This Discussion Paper provides guiding planning principles for the Lower Hunter; such as, supporting Lower Hunter towns and centres with appropriate services and infrastructure. This planning proposal is considered to be consistent with those applicable planning principles listed in this Paper.

5. Is the planning proposal consistent with the local Council's Community Strategic Plan, or other local strategic plan?

Community Strategic Plan

The relevant directions of the Port Stephens Integrated Planning Framework are:

- 11.1.1.1 Prepare and review Statutory, including rezoning applications and Development Control Plans
- 11.1.1.4 Provide statutory planning support and coordination of Greenfield development

The administration of this Proposal is consistent with the recommendations of the Lower Hunter Regional Strategy and Port Stephens Planning Strategy.

Port Stephens Planning Strategy (PSPS)

The PSPS identifies the Site as a 'smaller village centre' which is generally defined as a strip or cluster of shops with services available to local residents of the surrounding neighbours or communities and meets their day to day needs. This increase in commercial space does not place the centre higher within this Centre's Hierarchy, but rather reflects the role of the Site in catering for increased traffic volumes. The site's location on the corner of Nelson Bay and Richardson Road exposes it to high levels of passing traffic. The PSPS contains traffic forecast data, which is expected to increase to 57,245 vehicle movements by 2031.

These figures were reinforced through a recent request to the Roads and Maritime Services for updated traffic count data. The two trip counters of relevance: 1) 05649 – Richardson Road and 2) 05396 – Nelson Bay Road have not been updated since the production of the Port Stephens Planning Strategy in 2011.

Figure 2 – Street Map (p. 4) identifies the trip counters that have been used to calculate the traffic forecasts.

Port Stephens Commercial and Industrial Lands Study

The Commercial and Industrial Lands Study, which was undertaken to inform the PSPS identifies Salt Ash as:

'a centre located on Nelson Bay Road opposite the local public school. The anchor of the centre is the large petrol station. In total, there are around 1,800m² of occupied floor space in this centre. The nearest centre with a full-line supermarket is Medowie. Salt Ash benefits from being highly visible and easily accessible for through traffic travelling between the peninsulas and Newcastle'

'no plans for increased residential density in the areas surrounding the centre, any increases in demand is likely to come from the additional passing traffic as development on the peninsula occurs. Floor space demand is forecast to increase by 450m² between 2009 and 2013, which is likely to be easily accommodated on

the two lots which currently host the petrol station and other retail. These lots constitute the extent of the centre'

A closer examination of the existing floor space indicated it was not 1,800m², but closer to 962m². This was the result of the building overhangs (i.e. awnings), being calculated as leasable floor space and meant that the justification for an additional 1,288m² already existed.

The PSPS assumed that the subject site could cater for an increase of 450m² under existing-use rights based on the recommendations of the Commercial and Industrial Lands Study that demand 'could easily be accommodated on the two lots which currently host the petrol station and other retail. These lots should constitute the extent of the centre'(p. 77).

Further economic justification was sought by requesting that the Proponent complete an Economic Impact Assessment (**Attachment 1**).

Retail Potential and Impact Assessment (EIA) – 1519, Richardson Road, Salt Ash (Subject Site)

The Jones Lang Lasalle. 2014, 'Paul's Corner: Retail Potential and Impact Assessment' (**Attachment 1**) considered an expanded centre of 2,500 m², including approximately 2,162m² of retail floor area and concluded that impacts on existing centres would not be greater than 1.1%, which is considered negligible.

An Independent Review (**Attachment 2**) of the EIA indicated that they generally agreed with the assumptions contained in the Assessment in relation to retail turnover, inflation and assumed growth rate of daily traffic volumes (p.2). However, the Independent Review identified an error in the calculations of the forecast traffic volumes, which resulted in an estimated demand closer to 1,870 m², rather than 2,162 m². The Proponent responded by extending its traffic forecasts to 2034, a period of 20 years, which lead to a revised demand of 2,100 m².

6. Is the planning proposal consistent with applicable state environmental planning policies?

There are no existing or draft State Environmental Planning Policies that prohibit or restrict the proposed development as outlined in this planning proposal. An assessment of relevant State Environmental Planning Policies against the planning proposal is provided as follows:

SEPP 55 (Remediation of Land)

This SEPP provides state-wide planning controls for the remediation of contaminated land. Land must not be developed if it is unsuitable because it is contaminated.

Due to the past agricultural uses of the Subject Site a Phase 1 Contamination Assessment will be completed post-gateway to satisfy the provisions of this SEPP.

SEPP 55 (Rural Lands) 2008

Refer to s117 Direction – 1.5 Rural Lands (p. 8)

Section 117 Ministerial Directions

7. Is the planning proposal consistent with applicable Ministerial Directions?

The following s117 Ministerial Directions are applicable to the planning proposal:

- 1.1 Business and Industrial Zones – Consistent
- 1.2 Rural Zones – Inconsistent
- 1.3 Mining, Petroleum and Extractive Industries –Inconsistent
- 1.5 Rural Lands – Inconsistent
- 2.1 Environment Protection Zones – Consistent
- 2.2 Coastal Protection – Consistent
- 2.3 Heritage Protection – Consistent
- 2.4 Recreation Vehicle Areas – Consistent
- 3.1 Residential Zones – Consistent
- 3.2 Caravan Parks and Manufactured Home Estates – Consistent

- 3.4 Integrating Land Use and Transport – Consistent
- 3.5 Development near Licensed Aerodromes - Consistent
- 3.6 Shooting Ranges - Consistent
- 4.1 Acid Sulphate Soils – Consistent
- 4.3 Flood Prone Land – Inconsistent
- 4.4 Planning for Bushfire Protection – Consistent
- 5.1 Implementation of Regional Strategies – Consistent
- 6.1 Approval and Referral Requirements – Consistent

The inconsistencies listed above are considered to be of minor significance. Council seeks the Director General's concurrence for these listed inconsistencies.

1.1 Business and Industrial Zones

The objectives of this Direction are to encourage employment growth in suitable locations, protect employment land in business and industrial zones and support the viability of identified strategic centres.

This Proposal is consistent with this Direction as it proposes new employment lands within a centre that is identified by the Port Stephens Planning Strategy, which is guided by the centres approach outlined in the Lower Hunter Regional Strategy. This Proposal will not undermine the role of the existing centres hierarchy.

1.2 Rural Zones

The objective of this Direction is to protect the agricultural production value of rural land.

This Proposal is inconsistent with this Direction as it seeks to rezone land from a rural zone to a business zone. This inconsistency is of minor significance as the Site has limited agricultural value and is the logical extension of the existing centre. This is consistent with the demand identified by the Commercial and Industrial Lands Study, which informed the PSPS.

The concurrence of the Director General is not required.

1.3 Mining, Petroleum and Extractive Industries

The objective of this Direction is to ensure that the rezoning of land does not prohibit the mining of coal or other minerals, production of petroleum or extractive materials.

Half of the site is already developed for business land uses and the site is located close to rural residential development, which means it is unlikely that the site is suitable for any surface mining or extractive industry. In addition, the site is not known to contain any resources of coal, other minerals or extractive materials of State or Regional Significance.

The inconsistency with this Direction is of minor significance given that the nature of existing development already restricts the potential development of mining, petroleum production and extractive industries. The concurrence of the Director General is requested.

1.5 Rural Lands

The objective of this Direction is to protect the agricultural production value of rural land and facilitate the orderly and economic development of rural lands for rural and related purposes.

This Proposal is inconsistent with this Direction as it seeks to rezone land from a rural zone to a business zone. This inconsistency is believed to be of minor significance as the Site has limited agricultural value and is the logical extension of the existing centre.

This inconsistency is considered to be of minor significance and the concurrence of the Director General is not required.

4.3 Flood Prone Land

The objectives of this Direction are to ensure that development:

- To ensure that development of flood prone land is consistent with the NSW Government's Flood Prone Land Policy and the principles of the Floodplain Development Manual 2005
- To ensure that the provisions of an LEP on flood prone land is commensurate with flood hazard and includes the consideration of the potential flood impacts both on and off the subject land

The Proposal is inconsistent with this Direction as it is located within the Flood Planning Area. The inconsistency with this direction is believed to be of minor significance because:

- The existing finished floor levels are 2.25 AHD and the 100 year ARI flood level is estimated at 1.79AHD. No issues have been experienced on this Site
- The Site is not located in a floodway area
- Council Flooding Engineers identified how development may impact on drainage patterns can be provided post-gateway. This would include similar information to a stormwater drainage plan, such as:
 - Location and type of detention system
 - Demonstrated volume for maximum AEP
 - Pipes, pits, overland flow and discharge access points
 - Orifice type, location and screening facility
 - Slope/gradient of the land
 - Post-development flows equal to pre-development flows

The concurrence of the Director General is not required as it is in accordance with the Floodplain Risk Management Plan and is of minor significance.

SECTION C – Environmental, Social and Economic Impact

8. Is there any likelihood that critical habitat or threatened species, populations or ecological communities, or their habitats, will be adversely affected as a result of the proposal?

No. Due to the existing development and managed lands there is no likelihood of impact on threatened species, populations or ecological communities or their habitats on the site.

9. Are there any other likely environmental effects as a result of the planning proposal and how are they proposed to be managed?

No. There are no other likely environmental effects identified in informal guidelines, codes or policies that have been produced by public authorities that have not already been addressed in the State or Local Strategic Framework.

10. Has the planning proposal adequately addressed any social and economic effects?

Yes. The Proposal broadly implements the Port Stephens Planning Strategy and is supported by an Economic Impact Assessment (**Attachment 1**), which has been independently reviewed (**Attachment 2**).

SECTION D – State and Commonwealth interests

11. Is there adequate public infrastructure for the planning proposal?

The Proposal is located within existing infrastructure, such as public transport, major roadways and has access to most utilities. Liaison with the relevant infrastructure, utility, service and other relevant public authorities will be guided by the gateway determination.

12. What are the views of the State and Commonwealth public authorities consulted in accordance with the gateway determination?

The following agencies, subject to the gateway determination will be consulted during the public exhibition period:

- Hunter Water
- Rural Fire Service
- Transport NSW

Part 4 - Mapping

The relevant mapping is listed under Part 2 – Explanation of the Provisions and included under Attachments. Contextual maps for incorporated throughout the Proposal.

Part 5 - Details of Community Consultation

The Proposal is considered to be low impact and is recommended to be placed on public exhibition for a minimum period of 28 days. Community consultation will take place in accordance with the community consultation guidelines detailed in the Department of Planning & Environment, 2012, 'A Guide to Preparing Local Environment Plans.

This Planning Proposal is broadly consistent with the Port Stephens Planning Framework and in turn Council requests delegation to make this Plan following public exhibition.

Part 6 – Project timeline

The following timetable is proposed:

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Council Report									
Gateway Determination									
Studies – Traffic Contamination Flooding									
Public Exhibition									
Council Report									
Parliamentary Counsel									

Attachments

The following attachments are supplementary to this planning proposal:

- Attachment 1 – Economic Impact Assessment
- Attachment 2 – Independent Review
- Attachment 3 – LZN_004 – Site Identification Map
- Attachment 4 – LZN_004 – Existing Zoning
- Attachment 5 – LZN_004 – Proposed Zoning
- Attachment 6 – LSZ_004 – Existing Minimum Lot Size Map
- Attachment 7- LSZ_004 – Proposed Minimum Lot Size Map
- Attachment 8 – CL1_004 – Existing Additional Permitted Use Map
- Attachment 9 – CL1_004 – Proposed Additional Permitted Use Map
- Attachment 10 – HOB_004 – Existing Height of Building Map
- Attachment 11 – HOB_004 - Proposed Height of Building Map
- Attachment 12 – Proponent Response to Independent Review

Attachment 1 – Economic Impact Assessment

Refer to Separate Attachment.

July 2014



Paul's Corner: Retail Potential and Impact Assessment

Client: G & P Boshev

PO Box 122, Hamilton, NSW, 2303



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The financial analysis and conclusions contained within this report do not purport to represent a valuation in the conventional sense. It is an exercise involving only relatively few variables, such as zoning information and a general knowledge of background market conditions; whereas, a valuation involves a detailed investigation of the property including, where appropriate, the nature of the locality, surrounding properties, full inspection, site peculiarities, the nature, quality and condition of improvements, comparable sales, market trends, yields, competition, design and layout and so on. The market value could be greatly affected by such factors, and by encumbrances, restrictions, or other impediments on Title which have not been considered in this report. Accordingly, the financial analysis contained herein is indicative only and not authoritative. It is merely a precursor to a formal valuation and should not be taken as a substitute for it.



Executive Summary

- Paul's Corner occupies a strategic site on the corner of Nelson Bay Road and Richardson Road. This busy intersection is expected to experience very strong growth in vehicular traffic over the period to 2031.
- The local catchment of Salt Ash is small and cannot on its own support a range of retail services. The passing trade is significant and effectively allows a wider range of retail services to be viable, not only providing valuable convenience to Salt Ash residents but also to local workers and commuters.
- More services for Salt Ash residents would marginally reduce leakage to other retail centres. However, an expanded Paul's Corner will still provide only a small fraction of residents' needs. Larger centres with full-line supermarkets, discount department stores and department stores will continue to be the main destination for both weekly convenience and comparison shopping.
- The existing centre is 100% occupied, with existing tenancies smaller than many existing tenants would like. This highlights that existing demand already exceeds supply.
- Future expansion of Paul's Corner has been shown to not only be supportable, but will also have a negligible impact on existing retail centres and precincts within Port Stephens LGA.
- The Economic Impact Assessment (EIA) in this report considered an expanded centre of approximately 2,500sqm, including approximately 2,100sqm of retail floor area.
- The EIA highlights that no centre will experience an impact of greater than 1.1% and that this very small loss will be quickly won back within 12 months.
- We note that a smaller expansion of retail floor space with an overall lower level of sales turnover would be expected to have a reduced impact on competing centres.
- The reason for such a negligible impact is that:
 - An expanded Paul's Corner will still be very small compared with other centres across the Port Stephens LGA;
 - Paul's Corner draws its trade from a very wide region and therefore the relatively small increase in trade flowing to an expanded Paul's Corner will come from many centres. This dilutes its impact on any one centre; and
 - The centre is not intended to incorporate a large supermarket. It will not act as a destination retail centre, nor will it naturally draw customers from a wide region.
- A larger retail / commercial offering may comprise a mix of the following retail uses:
 - Expansion of existing stores, for example:
 - Grocery store of up to 500sqm;
 - Separate fruit and veg. store;
 - Butcher;
 - Separate liquor store;
 - Additional take-away food outlet(s);
 - Newsagent;
 - Small pharmacy;
 - Australia Post agency;
 - Seafood outlet;

- Doctors' surgery;
 - Child care;
- These uses are typical of small local / neighbourhood centres.
- The convenience of Paul's Corner for commuters should not be overlooked. This promotes multi-purpose trips, which is an effective way of reducing overall vehicular trips.
- We note that SGS Economics and Planning (SGSEP) forecast the future demand for tenancies at Paul's Corner to be 450sqm of additional demand. This was based on demand coming from local residents and workers only and did not account for future growth from passing trade (as vehicle numbers grow).

Introduction

This report provides an assessment of the potential future demand for additional retail tenancies at Paul's Corner, Salt Ash and the potential impact on existing larger retail shopping centres, should Paul's Corner be allowed to expand to meet future demand.

The strategic location of Paul's Corner at the intersection of Nelson Bay Road and Richardson Road provides a convenient location for commuters to stop for last minute supplies on the way home from work as well as local shopping facilities for nearby residents and workers. All tenancies are currently occupied and trade well.

We understand the owner has fielded enquiries from both existing tenants to expand and new tenants interested in space at Paul's Corner. These enquiries could be met with expansion of the centre; however current zoning does not permit expansion.

The report is divided into the following sections:

Section 1 describes the existing site and current improvements.

Section 2 identifies forecast floor space demand out to 2031, based primarily on forecast growth in traffic movements.

Section 3 provides the competitive context, highlighting the main retail centres in Port Stephens LGA that would compete with Paul's Corner.

Section 4 provides a brief analysis of the trade area (Port Stephens LGA).

Section 5 provides an Economic Impact Assessment of an expanded Paul's Corner on competitive centres in Port Stephens LGA.

1.1 Assumptions

The following assumptions have been made in this report:

Forecast increase in traffic volumes are from the *Port Stephens Planning Strategy 2011 – 2036*. This document highlighted traffic volumes on Nelson Bay Road at the intersection with Richardson Road was expected to grow from 17,174 vehicles per day in 2005 to 57,245 vehicles per day by 2031. We have assumed constant growth during this 26 year period.

The forecast demand in Section 2 primarily considers demand for retail floor space. A small allowance of non-retail floor space is provided for.

The *Port Stephens Commercial and Industrial Lands Study*, undertaken in July 2010 by SGS Economics and Planning (SGSEP) on behalf of Port Stephens Council, estimated the total commercial / retail floor area of Paul's Corner at 1,800sqm. This appears to include the residence at first floor level as well as the service station canopies. The actual gross lettable floor area of retail tenancies at Paul's Corner is 962sqm. For the purposes of this analysis, we have assumed the retail floor area to be 962sqm.

3 Forecast Demand, 2014-2031

This section considers the forecast demand for additional retail services and other land uses on the subject site out to 2031.

3.1 SGSEP forecasts (2010)

The SGSEP forecast the demand for additional floor space at 450sqm between 2009 and 2031. This was based on the centre only providing for the day-to-day needs of people who live or work in the "local area". Our discussions with the owner of the site reveal that only 10-15% of retail trade (excluding fuel sales) comes from local residents while most of the trade comes from either nearby workers or commuters travelling past the site. The primary driver of trade at Paul's Corner is the volume of passing traffic.

We have identified three sources of customers at Paul's Corner, namely:

- Local residents who patronize the retail services and service station due to its convenience / proximity to their home;
- Commuters / nearby workers who live in the Port Stephens LGA and travel past Paul's Corner regularly; and
- Travellers / commuters that live beyond the Port Stephen's LGA.

The local resident population is small (approximately 600 residents) and is not expect to grow significantly over time. The zoning is predominantly rural or rural living, which provides limited opportunities for further subdivision and residential growth.

Traffic volumes at the intersection of Nelson Bay Road and Richardson Road are forecast to grow significantly, from 17,174 vehicles in 2005 to 57,245 vehicles in 2031.¹ It is this potential growth in passing trade over the 26 year period that will have the greatest impact on demand for services at Paul's Corner.

3.2 Retail turnover and floorspace potential

Table 1 provides forecasts of the retail turnover potential at Paul's Corner. We have estimated current retail turnover figures (through discussions with the owner) as a starting point.

The following comments explain the methodology behind these forecasts and the assumptions that are made:

- We have estimated that 10% of available retail spending of local residents may flow to Paul's Corner. Paul's Corner and local centres in general, have a limited range of retail services, so most retail needs are catered for by higher order centres.
- This suggests annual retail sales of \$0.67 million from local residents should be achievable assuming a reasonable range of local shopping facilities.
- We have estimated current 2014 traffic volumes (using the 2005 and 2031 forecast) and assumed remaining trade comes from traffic users.
- Based on current total trade of \$5.5 million, \$4.86 million in retail trade comes from outside the local residential population.
- This equates to \$214.30 per vehicle per annum.
- Assuming the same level of trade is achieved per vehicle into the future, total sales from passing trade could grow from \$4.86 million in 2014 to \$12.27 million by 2031.
- The turnover figures are inflation adjusted (i.e. in 2014 dollars).

¹ Port Stephens Planning Strategy 2011 – 2036, p62

- We have allowed for some real growth in average turnover per sqm of retail floor space over the forecast period from \$5,600 per sqm to \$6,150 per sqm.
- On this basis, supportable retail floor area by 2031 will be 1,865sqm. This represents an increase in existing floor area of 903sqm.
- Over a 20 year time frame to 2034, supportable floor area would increase to an estimated 2,127sqm, assuming traffic volumes continue to grow.

We note that small centres typically have a mix of retail and non-retail uses. Non-retail land uses may include a doctor's surgery, child care, community centre or small office tenancies (banks etc.). Such uses are likely to account for at least 10% of the total floor area (e.g. 200-250sqm). These uses would provide valuable local services to the Salt Ash community.

Allowing for forecast growth of retail floor space, the existing residence and some non-retail uses, we conclude that supportable floor space demand at Paul's Corner would be approximately 2,200sqm in 2031 (and 2,500sqm by 2034). This is internal floor space only and excludes canopies associated with the existing service station operation. As per our forecasts in Table 1, nearly 1.900sqm may be retail tenancies.

Another key potential area of growth is in the service station itself. With vehicular traffic forecast to triple between 2005 and 2031, there will be considerably more demand for service stations and expansion of the existing operation together with ancillary service station uses (truck wash; take-away food) may be supportable.

A future floor area by 2031 of approximately 2,200sqm, together with potential expansion of the service station, on site sewerage system, gas storage, associated parking and landscaping will require additional land as the existing developed lots are close to capacity. The existing vacant lot to the north (Lot 7 DP 240103) provides an opportunity to expand Paul's Corner in line with growth in demand.

The key driver of demand for retail / commercial services at Paul's Corner will be the forecast growth in daily traffic volumes past the site. A benefit of providing additional services at Paul's Corner will be improved local services for the small local population of Salt Ash.

Table 1: Forecast Retail Growth Potential, 2014-2031

Forecast Retail Growth	2014	2016	2021	2026	2031
Local Trade Area Population	609	615	631	647	663
Spend per Capita (\$)	10,959	11,068	11,348	11,635	11,928
Total Shopfront Spending (\$m)	6.67	6.81	7.16	7.52	7.91
10% Market Capture (\$m)	0.67	0.68	0.72	0.75	0.79
Daily traffic (average per day)	26,053	28,581	36,028	45,414	57,245
Sales to passing trade (\$m)	4.86	5.33	6.72	8.47	10.68
Sales per vehicle p.a. (\$ per annum)	186.5	186.5	186.5	186.5	186.5
Total Sales (\$m)	5.5	6.0	7.4	9.2	11.5
Retail Turnover (\$ per sqm)	5,600	5,700	5,850	6,000	6,150
Supportable Retail Floor Area (sqm)	987	1,055	1,271	1,537	1,865
Existing Retail Area (sqm)	962	962	962	962	962
Additional Demand (sqm)	25	93	309	575	903

Source: JLL, Australian Bureau of Statistics, NSW Department of Planning and Environment: State and Local Government Area Population, Household and Dwelling Projections: 2014 Final

4 Competitive Context

4.1 Existing Retail Centres

The closest supermarket based retail precinct is at Medowie, approximately 7km north-west of Paul's Corner. This provides a diverse range of convenience shopping and is anchored by two supermarkets, Coles and Woolworths. Woolworths supermarket opened in 2014.

The largest concentrations of shopping within close proximity to Paul's Corner are at Raymond Terrace and Salamander Bay. Both are anchored by discount department stores and supermarkets and provide convenience and comparison shopping for residents from relatively large "sub-regional" catchments. Salamander Bay S.C. went through a small redevelopment in 2012, with the addition of an ALDI supermarket and conversion of the Bi-Lo supermarket to Coles.

Nelson Bay has a more traditional main street / CBD shopping environment, anchored by a small Coles supermarket.

Further afield, regional level shopping anchored by full line department stores, discount department stores and supermarkets and supported by a comprehensive range of specialty shopping is found within the Newcastle metropolitan area. The main shopping centres in Newcastle include Westfield Kotara and Charlestown Square.

Small neighbourhood level shopping precincts are located throughout the peninsula, providing for local services and typically anchored by small supermarkets / grocery stores such as the IGA supermarkets at Anna Bay and Shoal Bay.

Table 2 identifies the main retail centres together with their anchor tenants within the Port Stephens LGA.

Table 2: Competitive Context: Port Stephens LGA

Centre Name	Address	Dist. From Site	Retail Area (sqm)	Major stores
DDS Based Centres				
Marketplace Raymond Terrace	35-39 William Street	15km	14,800	Big W, Woolworths
Salamander Bay Shopping Centre	2 Town Centre Circuit	20km	22,500	Kmart, Woolworths, Coles, Target Country, ALDI
Supermarket Based Centres				
Centro Raymond Terrace	Cnr Sturgeon and Glenelg St	15km	7,150	Woolworths
Medowie Neighbourhood Precinct	Ferodale Road	7km	n.a.	Woolworths, Coles
Tanilba Bay Shopping Centre	67 Beatty Boulevard	11km	n.a.	Coles
Other Supermarkets				
Coles Nelson Bay	26-30 Stockton Street	24km	~1,200	Coles
Aldi Raymond Terrace	22-32 Port Stephens Road	15km	n.a.	ALDI
IGA Anna Bay	1/118 Gan Gan Road	17km	n.a.	IGA
IGA Shoal Bay	26-27 Shoal Bay Village	27km	n.a.	IGA

Source: JLL, Property Council of Australia

Major retail projects that have been proposed include the following:

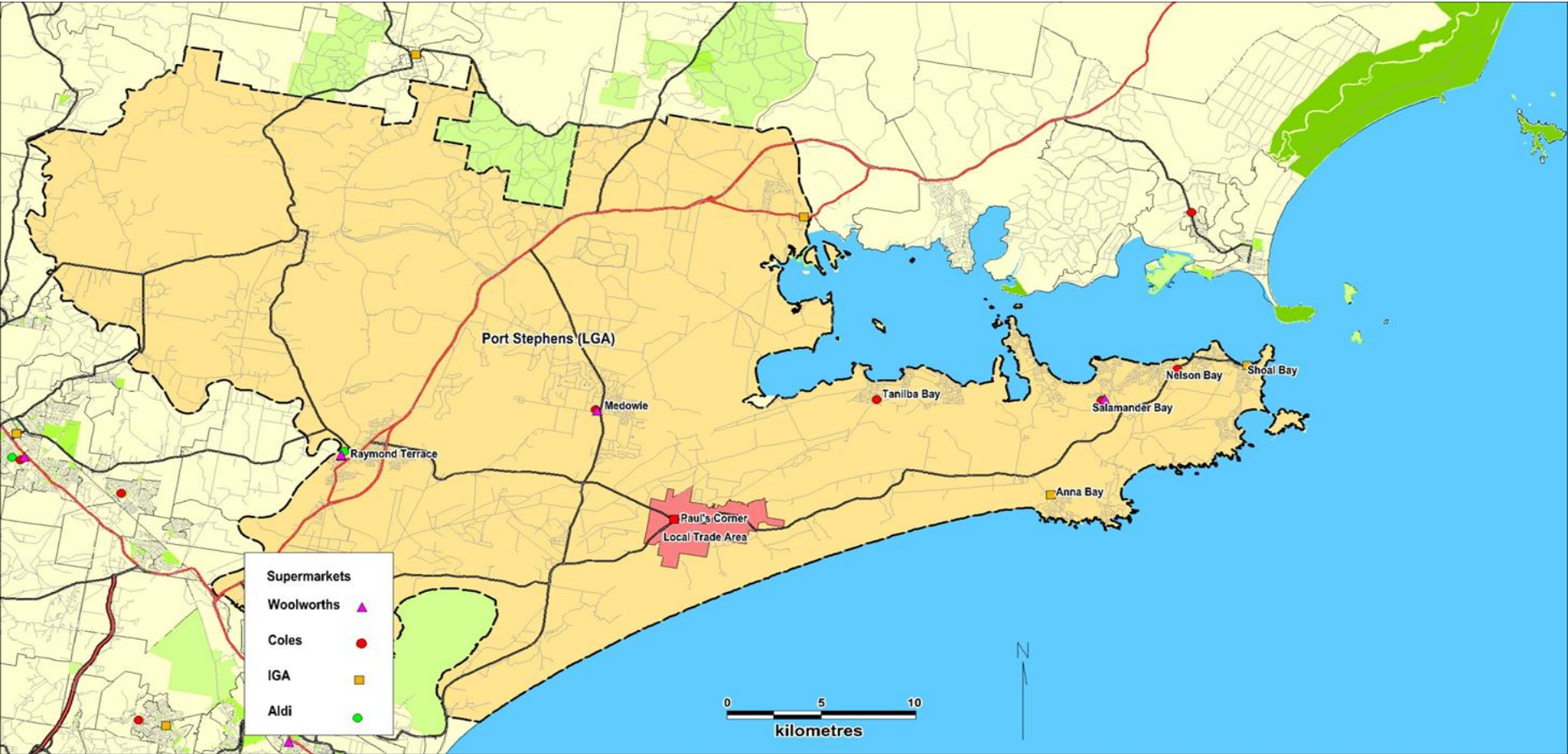
- A Big W has been approved at Salamander Bay. We understand that Woolworths has withdrawn from this particular project, although we note that Big W does not have an existing store near Salamander Bay (the nearest store being Raymond Terrace).
- A Woolworths supermarket together with a liquor store and specialties is approved at Nelson Bay. The 3,500sq.m development is expected to commence in late 2014 with completion in 2016.

Bulky goods retailing has become a focus of recent development with the completion of a Masters store at Heatherbrae in 2013, the approval of two showrooms at Taylors Beach and the development of a Bunnings Warehouse at Taylors Beach.

We also note that there is a current application for a 2,500sqm tourist facility with associated take-away food premises at the corner of Cabbage Tree and Nelson Bay Roads.

Given the relatively strong population growth across Port Stephens LGA, there will no doubt be further retail development over the next 10-20 years. This is expected to be growth of existing centres as well as the emergence of new centres to service growing residential or workforce bases. Two areas that are expected to see new retail development in the future are Williamtown (to serve the defence base) and Kings Hill (targeted for significant residential growth).

Figure 2: Paul's Corner Regional Context and Trade Areas



Source: PBBi Mapinfo, JLL

5 Trade Area Analysis

5.1 Trade Area Defined and Population Forecasts

There are two distinct trade areas for Paul's Corner:

- A local trade area, that primarily includes local residents of Salt Ash; and
- A “commuters” trade area, which primarily includes residents from the local government area of Port Stephens that commute to Newcastle or other nearby destinations and pass Paul's Corner on a daily basis.

The two trade areas are illustrated on Figure 2 together with the main competitive retail precincts.

The local trade area has a small population and extends around 2km from Paul's Corner. As at the 2011 Census, this trade area comprises one “SA1” geographic area and had an estimated residential population of 600 residents.

Table 3 provides forecasts of the population growth across the total catchment, being the Port Stephen's LGA. We have assumed very low growth in the local trade area of around 0.5% per annum, due to Salt Ash having limited opportunities for additional subdivision / expansion without rezoning of land occurring. Growth, however, across the Port Stephen's LGA is expected to be relatively strong, growing from 67,200 residents in 2011 to 88,900 residents by 2031.

Table 3: Population Forecasts, Port Stephens LGA 2011-2031

Population Forecast	2011	2016	2021	2026	2031
Local Trade Area (Salt Ash)	600	615	631	647	663
Commuter Catchment	66,600	73,235	78,519	83,553	88,237
Total Catchment (Port Stephen's LGA)	67,200	73,850	79,150	84,200	88,900
		2011-16	2016-21	2021-26	2026-31
Total Population Change		6,600	5,350	5,050	4,650
Average Annual Population Growth		1.9%	1.4%	1.2%	1.1%

Source: JLL, NSW Department of Planning and Environment

5.2 Demographic Profile

Table 4 and the charts on the following pages provide a summary of the trade area characteristics of the local and commuter trade areas. The key characteristics of the trade areas are:

- Port Stephens' age profile is reasonably balanced, although it is popular retirement location. Residents aged 65 and over account for 19.3% of the population (NSW average is 14.7%).
- The median age of residents is a high 42 years compared with the NSW median of 38 years.
- There is a relatively low proportion of young adults aged 20-34. Only 14.7% of the population compared with the NSW average of 20.1%.
- The population is predominantly Australian born with the largest overseas born group being from the UK. Only 6.6% of the population were born in other countries (NSW average 23.1%).
- A high 82.4% of dwellings are separate houses (NSW average 69.6%).
- Couples with no children account for 43% of families (NSW average 36.6%).
- Income levels are relatively low, which partly reflects the higher level of retirement aged residents. The median personal income is 11.2% lower than the state average

Table 4: Port Stephens LGA, Selected Medians, 2011

Selected Characteristic	Port Stephens (LGA)	NSW
Median age of persons	42	38
Median mortgage repayment (\$/monthly)	\$1,725	\$1,993
Median total personal income (\$/weekly)	\$498	\$561
Median rent (\$/weekly)	\$250	\$300
Median total family income (\$/weekly)	\$1,246	\$1,477
Average number of persons per bedroom	1.1	1.1
Median total household income (\$/weekly)	\$999	\$1,237
Average household size	2.5	2.6

Source: JLL, Australian Bureau of Statistics (2011 Census)

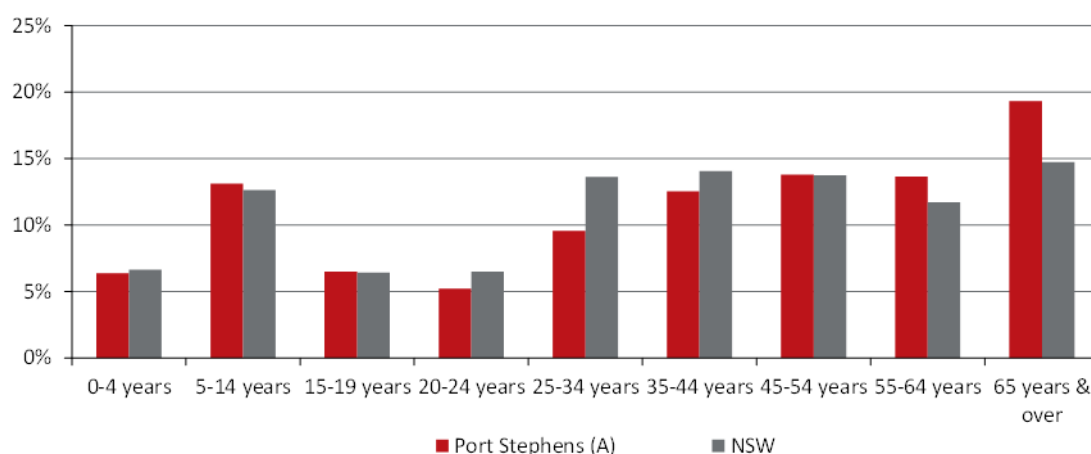
Table 5: Port Stephens LGA, Selected Characteristics, 2011

Selected Characteristic	Port Stephens (LGA)	NSW
<u>Population</u>	69,800	7,211,500
<u>Age Distribution</u>		
0-4 years	6.4%	6.6%
5-14 years	13.1%	12.6%
15-19 years	6.5%	6.4%
20-24 years	5.2%	6.5%
25-34 years	9.5%	13.6%
35-44 years	12.5%	14.0%
45-54 years	13.8%	13.7%
55-64 years	13.6%	11.7%
65 years & over	19.3%	14.7%
<u>Birthplace</u>		
Australia	88.3%	72.7%
UK	5.1%	4.2%
Europe	1.8%	3.8%
Asia	1.2%	9.3%
Other	3.6%	10.0%
<u>Housing Status</u>		
Owner	38.6%	34.1%
Purchaser	32.1%	34.2%
Renter	28.3%	30.9%
Other	1.0%	0.8%
<u>Dwelling Structure</u>		
Separate house	82.4%	69.6%
Semi-det, row/terrace, townhouse	10.8%	10.7%
Flat, unit, apt	4.6%	18.8%
Other dwelling	2.2%	0.9%
<u>Family Composition</u>		
Couple - No Children	43.0%	36.6%
Couple - Dependant Children	27.0%	30.6%
Couple - Non-dependant Children	12.4%	14.8%
One Parent - Dependant Children	9.8%	8.3%
One Parent - Non-dependant Children	6.8%	8.0%
Other Family	1.0%	1.7%
<u>Households</u>		
Family Households	73.2%	71.9%
Lone Person Households	24.6%	24.2%
Group Households	2.3%	3.8%

Source: JLL, Australian Bureau of Statistics (2011 Census)

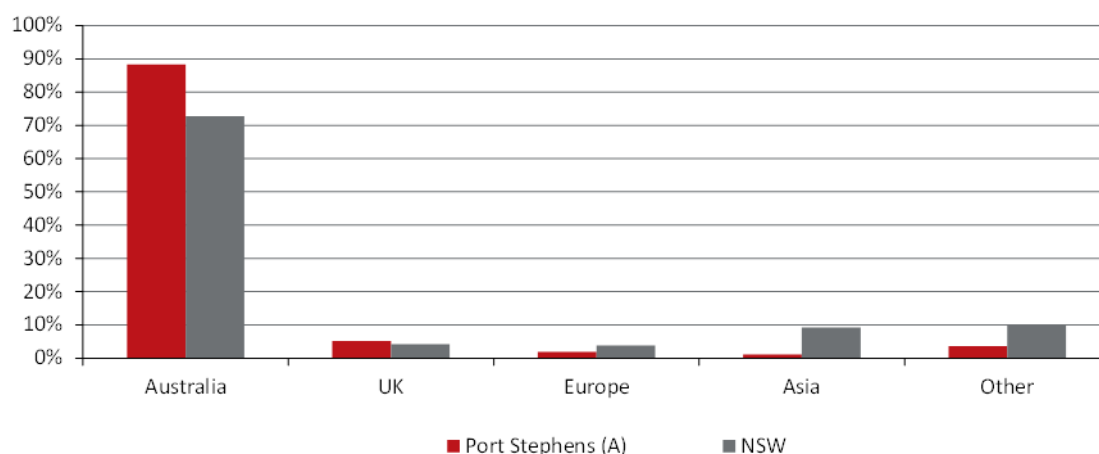


Figure 3: Age Profile – Port Stephens LGA, 2011



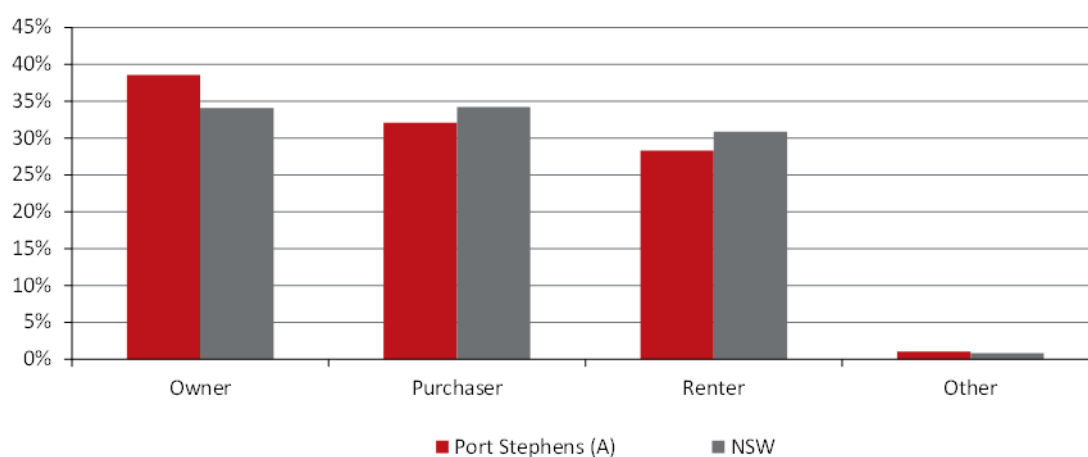
Source: JLL, Australian Bureau of Statistics (2011 Census)

Figure 4: Birthplace - Port Stephens LGA, 2011



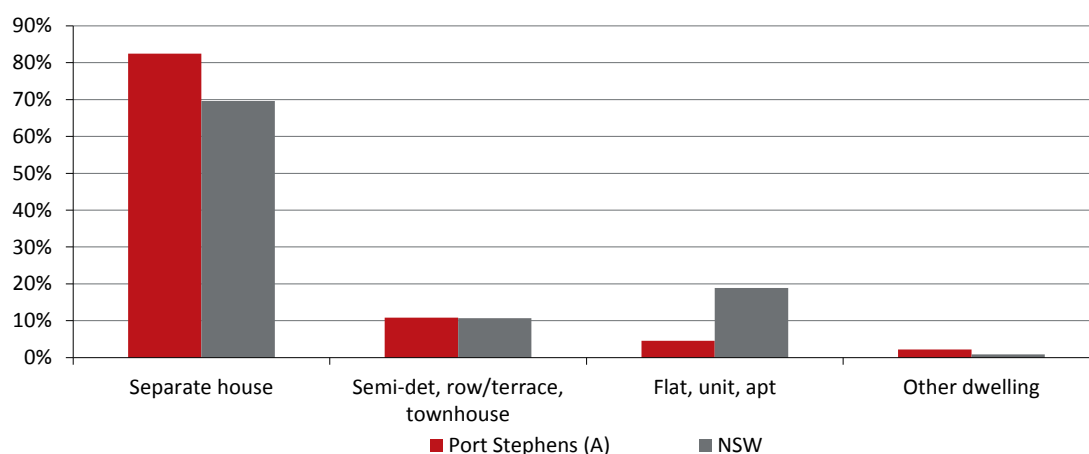
Source: JLL, Australian Bureau of Statistics (2011 Census)

Figure 5: Housing Status - Port Stephens LGA, 2011



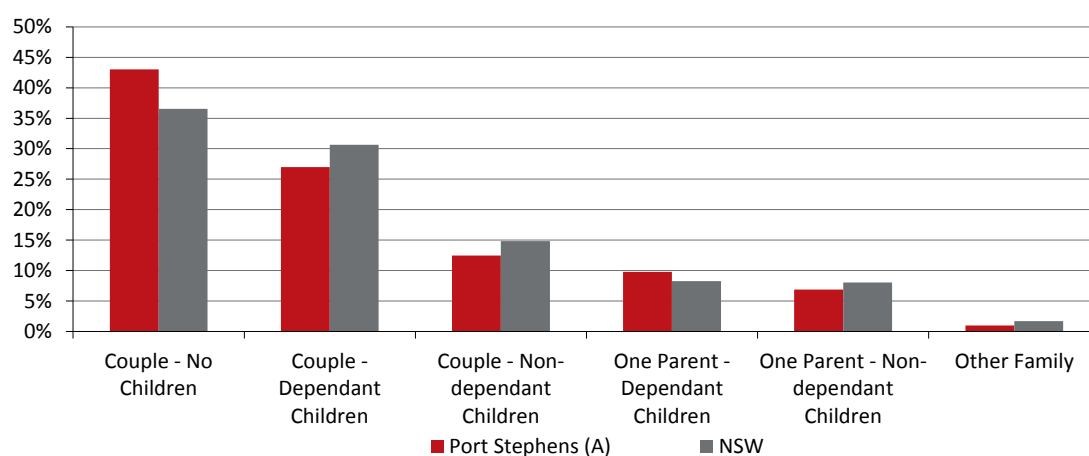
Source: JLL, Australian Bureau of Statistics (2011 Census)

Figure 6: Dwelling Type - Port Stephens LGA, 2011



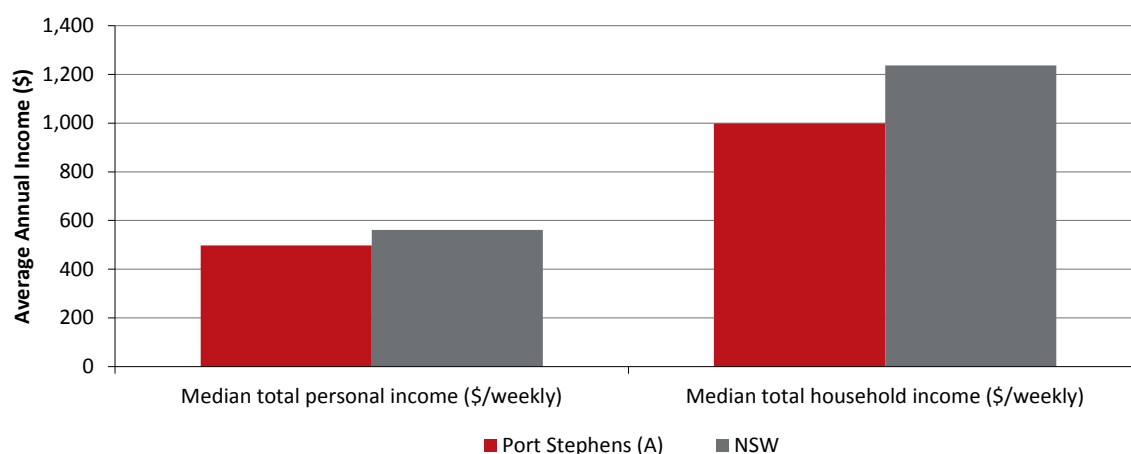
Source: JLL, Australian Bureau of Statistics (2011 Census)

Figure 7: Family Composition - Port Stephens LGA, 2011



Source: JLL, Australian Bureau of Statistics (2011 Census)

Figure 8: Personal and Household Incomes - Port Stephens LGA, 2011



Source: JLL, Australian Bureau of Statistics (2011 Census)

6 Retail Economic Impact Assessment

In order to assess the economic impact of an expanded Paul's Corner retail centre on surrounding retail centres and precincts, we have considered the market share that the proposed development is likely to achieve across the catchment.

The impact of the proposed development on the main surrounding centres has been calculated taking into account the following:

- The expanded Paul's Corner of approximately 2,100sqm retail area and 2,500sqm total floor area is assumed to be trading by 2018. This year is used as the first full year of trading and total sales is estimated at \$12.4 million in this year;
- A small increase in trading levels (turnover per square metre) has been provided for. The trading levels are consistent with expected performance for small local centres;
- For each of the main centres that draw on the same catchment, turnover has been forecast using a market share approach. The greater the competing centres rely on the Paul's Corners' catchment for its turnover, the greater the forecast impact;
- Turnover levels are forecast both with and without the expansion at Paul's Corner.
- The turnover levels are then compared to what the centres would have achieved assuming the proposed expansion at Paul's Corner did not occur.

The findings of the economic impact assessment are summarised in Table 6. In each of the centres analysed, the impact is no greater than 1.1%, which is considered to be negligible.

A negative impact of less than 5% is generally considered to be relatively minor; between 5% and 10% is cause for concern, particularly in areas that are expecting low turnover growth, while a negative impact of over 10% is considered significant and likely to impact on the viability of surrounding centres.

Furthermore in each of the centres analysed, the very small loss in trade is expected to be fully recovered within the first 12 months of operation (see Table 8).

The very low impact is due to the following:

- An expanded Paul's Corner will still be very small compared with other centres across the Port Stephens LGA.
- Paul's Corner draws its trade from a very wide region and therefore the relatively small increase in trade flowing to Paul's Corner will come from many centres. This dilutes its impact on any one centre.
- The centre is not intended to incorporate a large supermarket. Total retail potential is estimated at 2,100sqm, which is significantly smaller in total than a typical Woolworths or Coles supermarket. This means it will not act as a destination retail centre, nor will it naturally draw customers from a wide region.

Table 6: Impact Assessment of Paul's Corner on Competing Centres, 2018

	2018 (\$m)	2018 (\$m)	2018	
	Existing Paul's Corner	Expanded Paul's Corner	Impact (\$m)	% Impact
Paul's Corner	5.9	12.4	n.a.	n.a.
Main Competing Centres				
Marketplace Raymond Terrace	105.2	104.4	0.7	0.7%
Salamander Bay Shopping Centre	205.1	202.9	2.2	1.1%
Centro Raymond Terrace	70.1	69.4	0.7	0.9%
Medowie Neighbourhood Precinct	54.4	53.8	0.6	1.1%
Tanilba Bay Shopping Centre	27.2	26.9	0.3	1.1%
Nelson Bay	32.7	32.3	0.4	1.1%
Aldi Raymond Terrace	8.7	8.6	0.1	0.8%

Source: JLL, Property Council of Australia, NSW Dept. Planning and Environment

Table 7 highlights the source of turnover at an expanded Paul's corner, based on our analysis. It is estimated that \$4.9 million of new turnover will come from existing centres identified above but these centres are estimated to have combined sales in 2018 of over \$500 million per annum. \$4.9 million accounts for less than 1% of this total.

A further \$1.7 million of new turnover is expected to come from "beyond" the seven competing centres identified in Table 6. This includes small retail precincts at Fingal Bay, Anna Bay and Shoal Bay, other retail outlets at Raymond Terrace and Salamander Bay that are not included in the identified centres, as well as retail spending that is diverted from outside the Port Stephens LGA.

Table 7: Source of Turnover – Expanded Paul's Corner

Source of Turnover	Turnover (\$m)	% of Total
Existing Turnover	5.9	47.4%
Impact on Competing Centres	4.9	39.2%
Increase from Beyond (other retailers in LGA / beyond LGA)	1.7	13.4%
Total Turnover	12.4	100.0%

Source: JLL, Property Council of Australia, NSW Dept. Planning and Environment

We note that not all of the retail floor space across Port Stephens LGA has been included in the impact analysis. However, the seven centres the focus of this EIA represent the seven major concentrations of existing retail floor space that could reasonably be considered to be affected by an expansion to Paul's Corner. The seven centres included all are expected to recover any diverted turnover within one year (through annual turnover growth), and the percentage impact of an expansion to Paul's Corner is forecast to be no more than 1.1%. The impact on other small centres and retailers within Port Stephens LGA would be no greater than that of the main competing centres.

Table 8: Impact Assessment – Competing Centres, 2018 (pre-development) versus 2019 (post development)

	2018 (\$m)	2018 (\$m)	2019 (\$m)	Growth (\$m)
	Existing Paul's Corner	Expanded Paul's Corner	Expanded Paul's Corner	2018 to 2019*
Paul's Corner	5.9	12.4	12.6	n.a.
Main Competing Centres				
Marketplace Raymond Terrace	105.2	104.4	106.4	1.3
Salamander Bay Shopping Centre	205.1	202.9	206.8	1.7
Centro Raymond Terrace	70.1	69.4	70.7	0.7
Medowie Neighbourhood Precinct	54.4	53.8	54.8	0.4
Tanilba Bay Shopping Centre	27.2	26.9	27.4	0.2
Nelson Bay	32.7	32.3	32.9	0.2
Aldi Raymond Terrace	8.7	8.6	8.8	0.1

Source: JLL, Property Council of Australia, NSW Dept. Planning and Environment

* The growth compares estimated turnover in 2018 without the expansion of Paul's Corner to 2019 turnover with the expansion. In all analysed centres, the small loss in turnover is recouped within 12 months.



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Attachment 2 – Independent Review

Refer to Separate Attachment.

05 September 2014

Jeffrey Bretag
Senior Strategic Planner
Port Stephens Council
PO Box 42
Raymond Terrace
NSW 2324
By email: Jeffrey.bretag@portstephens.nsw.gov.au

Dear Jeffrey,

PRELIMINARY REVIEW OF JONES LANG LASALLE – PAUL’S CORNER RETAIL POTENTIAL AND IMPACT ASSESSMENT

This letter presents our high level views in relation to the report prepared by Jones Lang LaSalle titled *"Paul's Corner: Retail Potential and Impact Assessment,"* (JLL report).

The JLL report presents a high level assessment of potential retail trading impacts associated with a minor increase in retail floorspace that could be supported at the subject site, that could be enabled through a potential rezoning of the subject site from RU2 – Rural Landscape to B1 – Neighbourhood Centre. We have outlined our key findings and recommendations below.

MacroPlan Dimasi Comments

We agree that the local residential population surrounding the subject site is small and that the lion's share of retail turnover for the existing, and indeed, any future proposed retail tenants would be generated in the form of passing traffic along Nelsons Bay Road and Richardson Road. Given the nature of the facilities (i.e. collocated with a service station) and the scale of the local population (i.e. small: 600 people) we generally agree that this share of business could be around 90%.

Based on the projections in the Port Stephens Planning Strategy 2011-2036, traffic volumes along Nelsons Bay Road around the intersection with Richardson Road are expected to grow significantly over the next 10-20 years. Indeed, traffic volumes are expected to increase by almost 120% in the next 17 years to 2031.

We generally agree with the assumptions contained in the report in relation to retail turnover, inflation and assumed growth in retail turnover densities. However, we calculate the average growth rate of daily traffic volumes between 2005 and 2031 along Nelsons Bay Road to be about 4.7% per annum. If traffic volumes were 17,174 in 2005, then 9 years’ growth results in a daily volume of 26,053 in 2014, not 22,674 as quoted in Table 1.

This means that average sales to per vehicle p.a. are actually \$186.50 rather than \$214.30 as quoted. Applying this rate to the volume of traffic in 2031, results in potential sales volumes at Paul’s Corner of \$11.5 million (i.e. \$10.7 million passing traffic plus \$0.8 million from residents). Applying the RTD of \$6,150, as per JLL Table 1, we estimated demand to be closer to 1,870 sq.m, rather than 2,162 sq.m.

Due to this error in calculation, the ‘additional demand’ is slightly overstated by JLL in its analysis. Although this calculation error overstates the supportable floorspace by more 10%, this does not fundamentally change the analysis. There is strong traffic growth expected, that could almost double the potential demand for retail facilities at the subject site. If anything, this slight reduction in likely sales turnover/retail floorspace demand at the subject site would reduce the potential trading impacts on the surrounding retail network.

In summary, the proposed scale of additional retail floorspace is minor, in the context of the surrounding retail hierarchy across the broader region (which includes much larger centres), and is likely to result in negligible impacts on the surrounding retail network. Given the significant expected increase in traffic volumes along Nelson Bay Road, we consider that additional retail floorspace could be supported at the subject site and the proposed mix of uses seems reasonable at this location (i.e. convenience oriented uses).

We agree that a B1 – Neighbourhood Centre zone would be appropriate, as this zoning would only allow smaller scale retail and commercial uses to be supported.

Should you wish to discuss this matter further, please contact me on turnbull@macroplan.com.au or 02 9221 5211.

Yours sincerely

James Turnbull
Senior Manager
Retail

Attachment 3 – LZN_004_Site Identification Map



Port Stephens Local Environmental Plan 2013

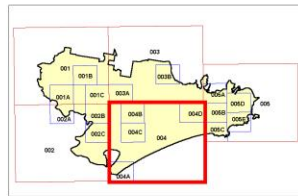
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Legend

Proposed Zone

Cadastral

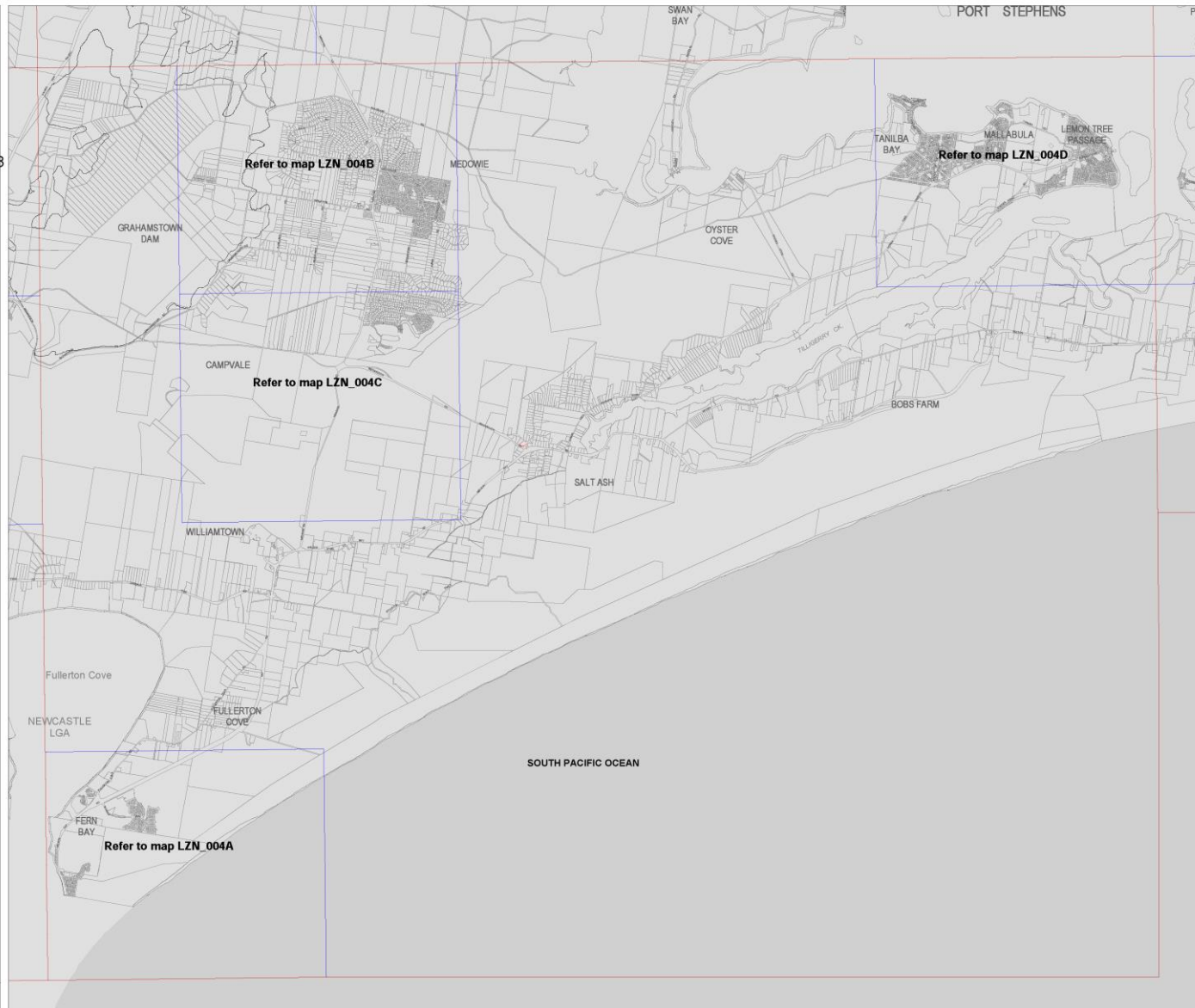
Cadastral 08/09/2014 © Land and Property Information (LPI)

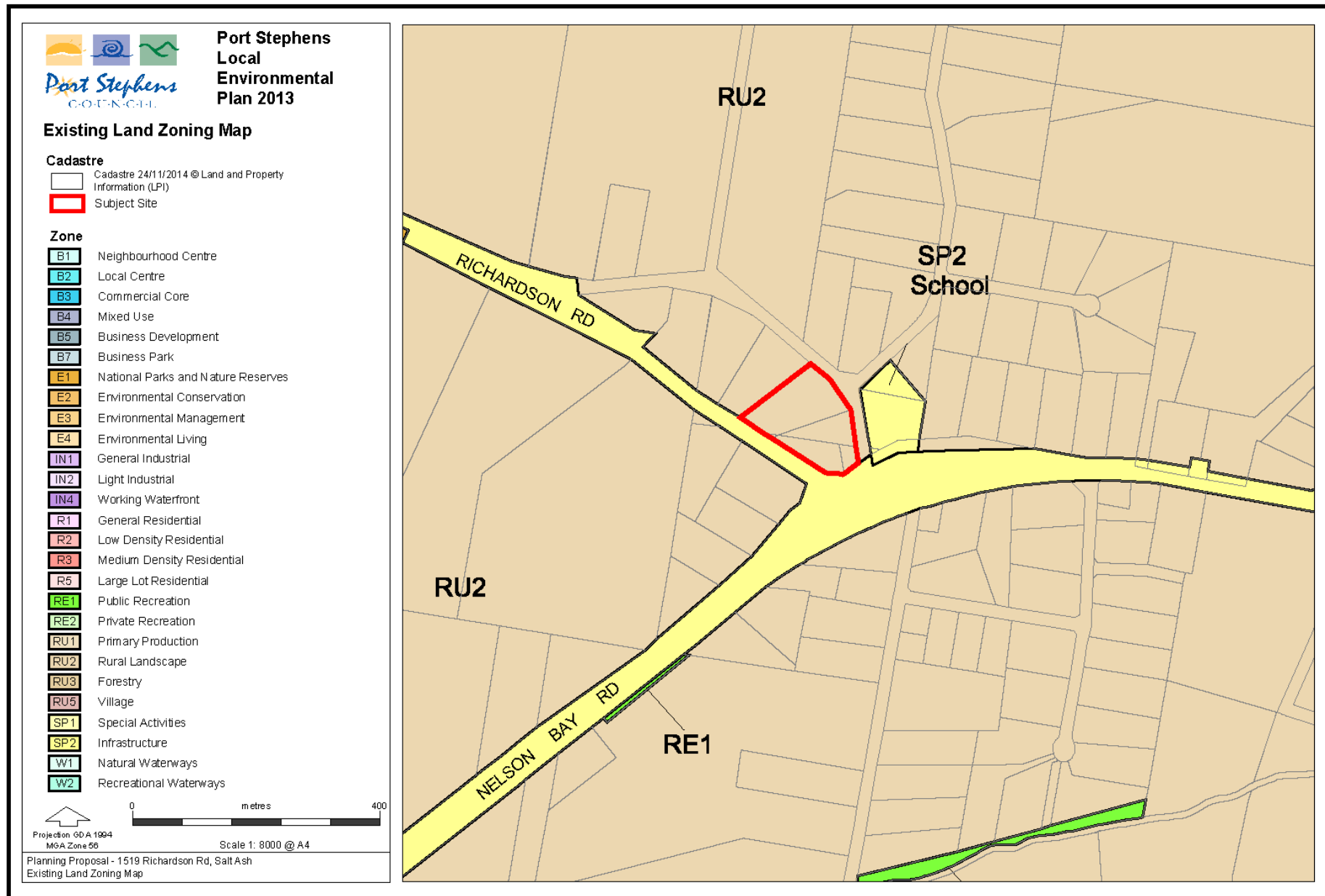


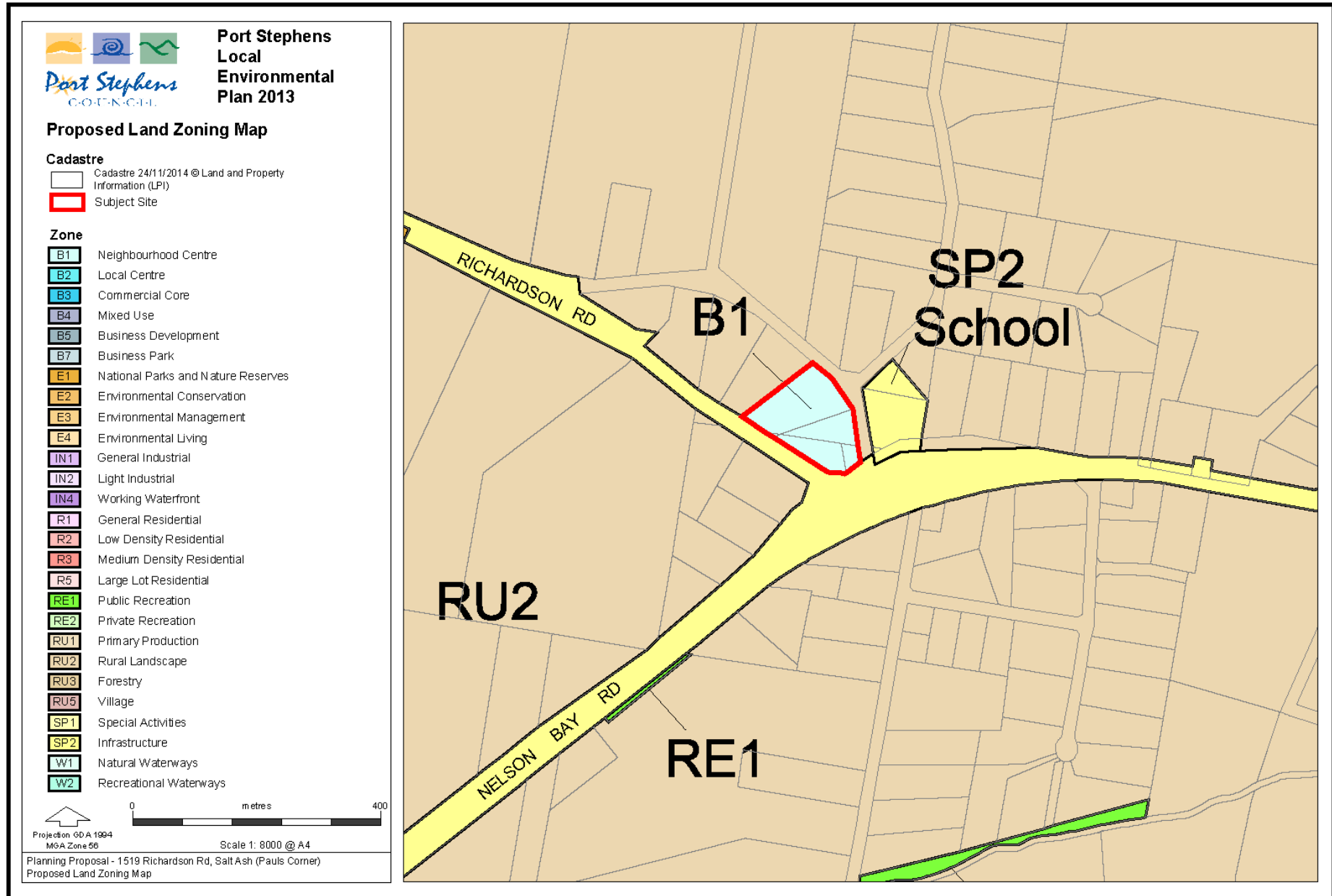
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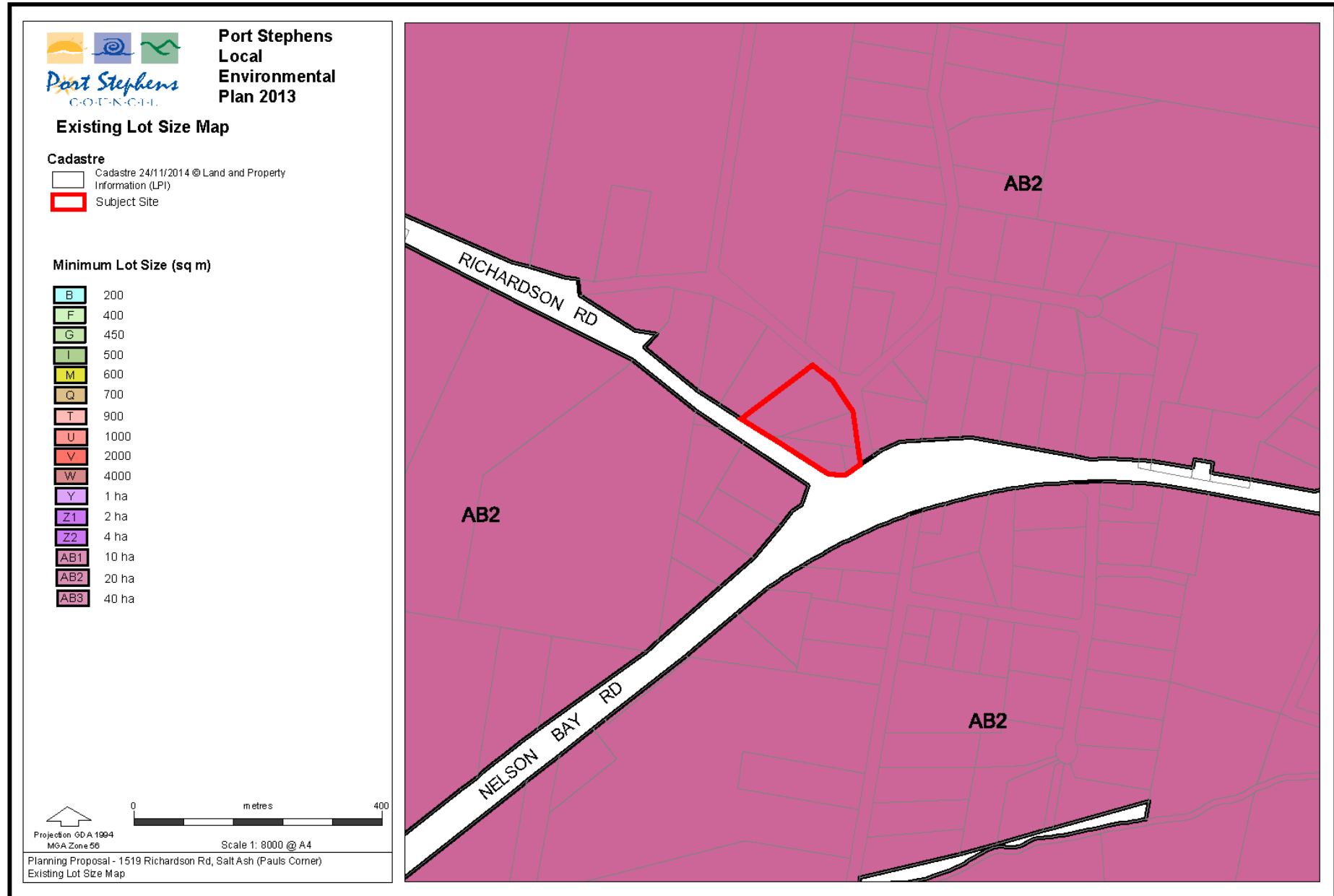
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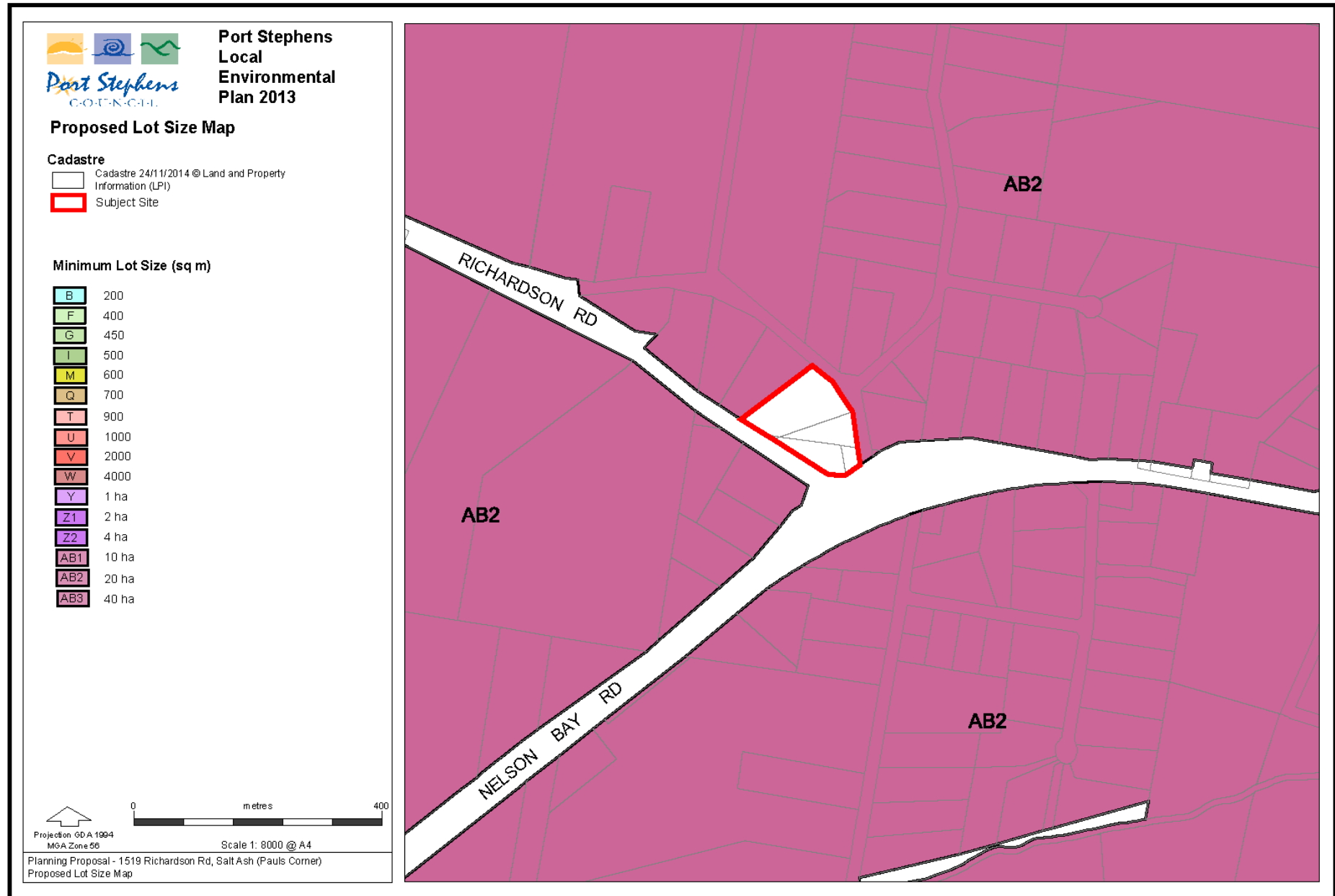




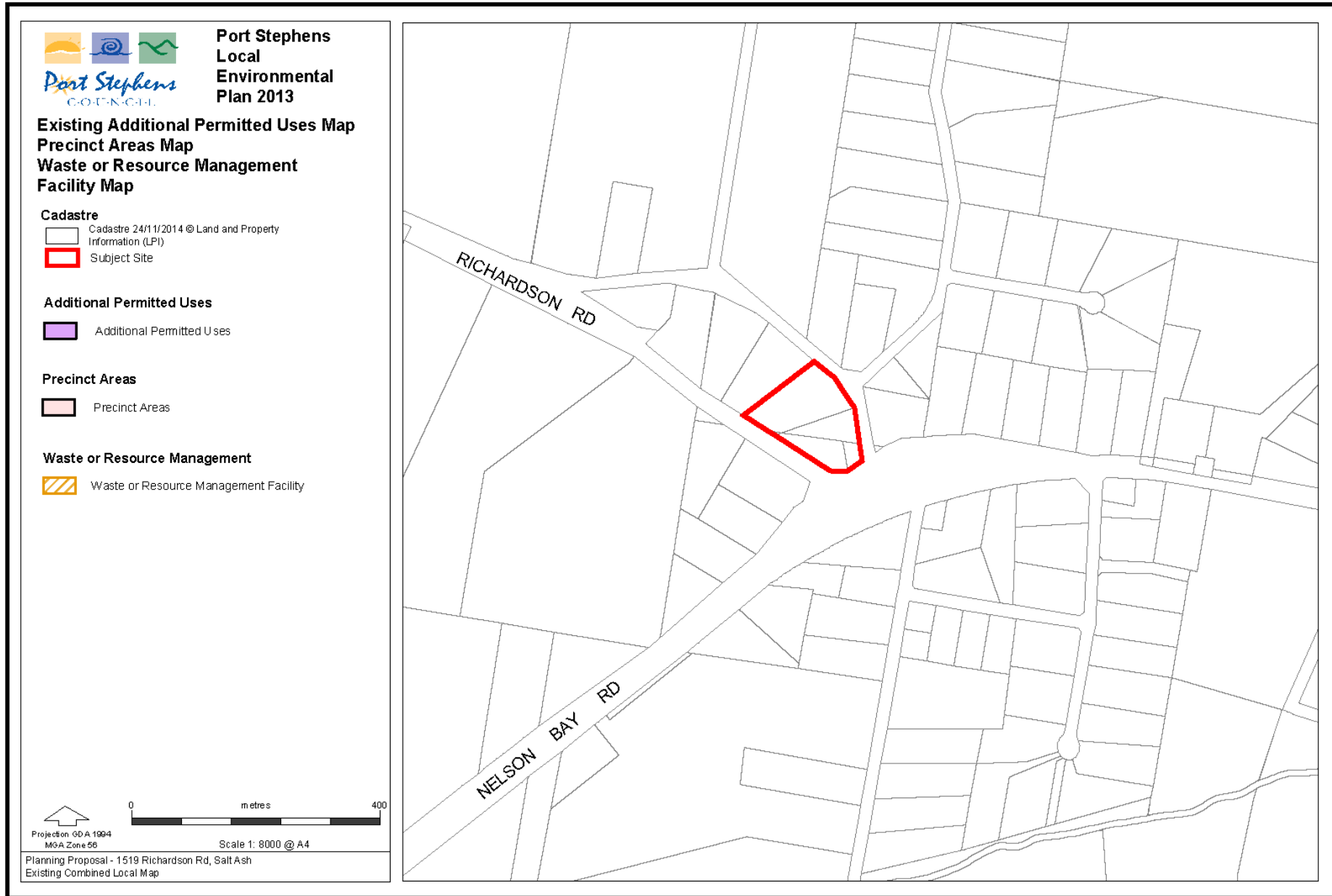
Attachment 6 – LSZ_004 – Existing Minimum Lot Size Map

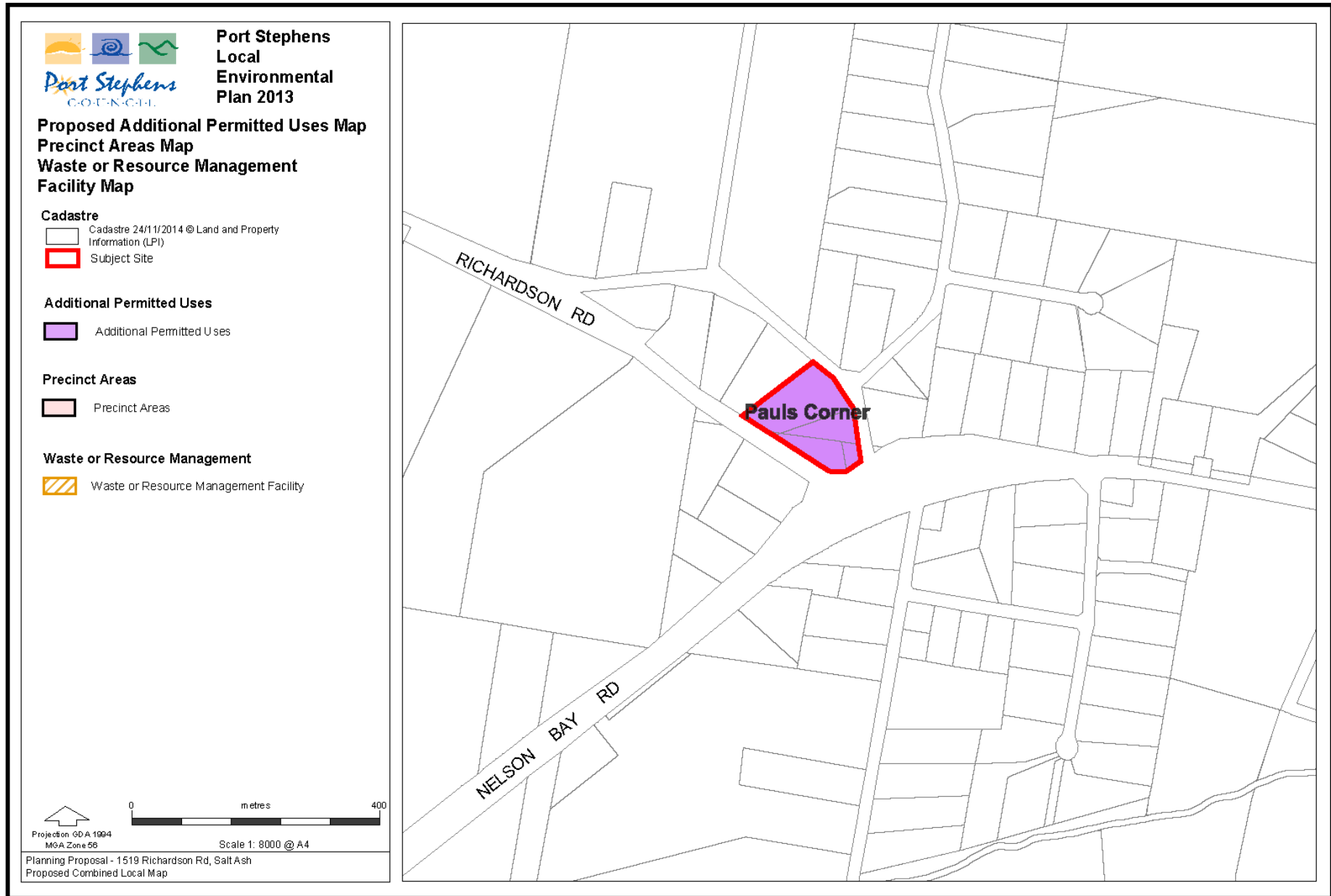


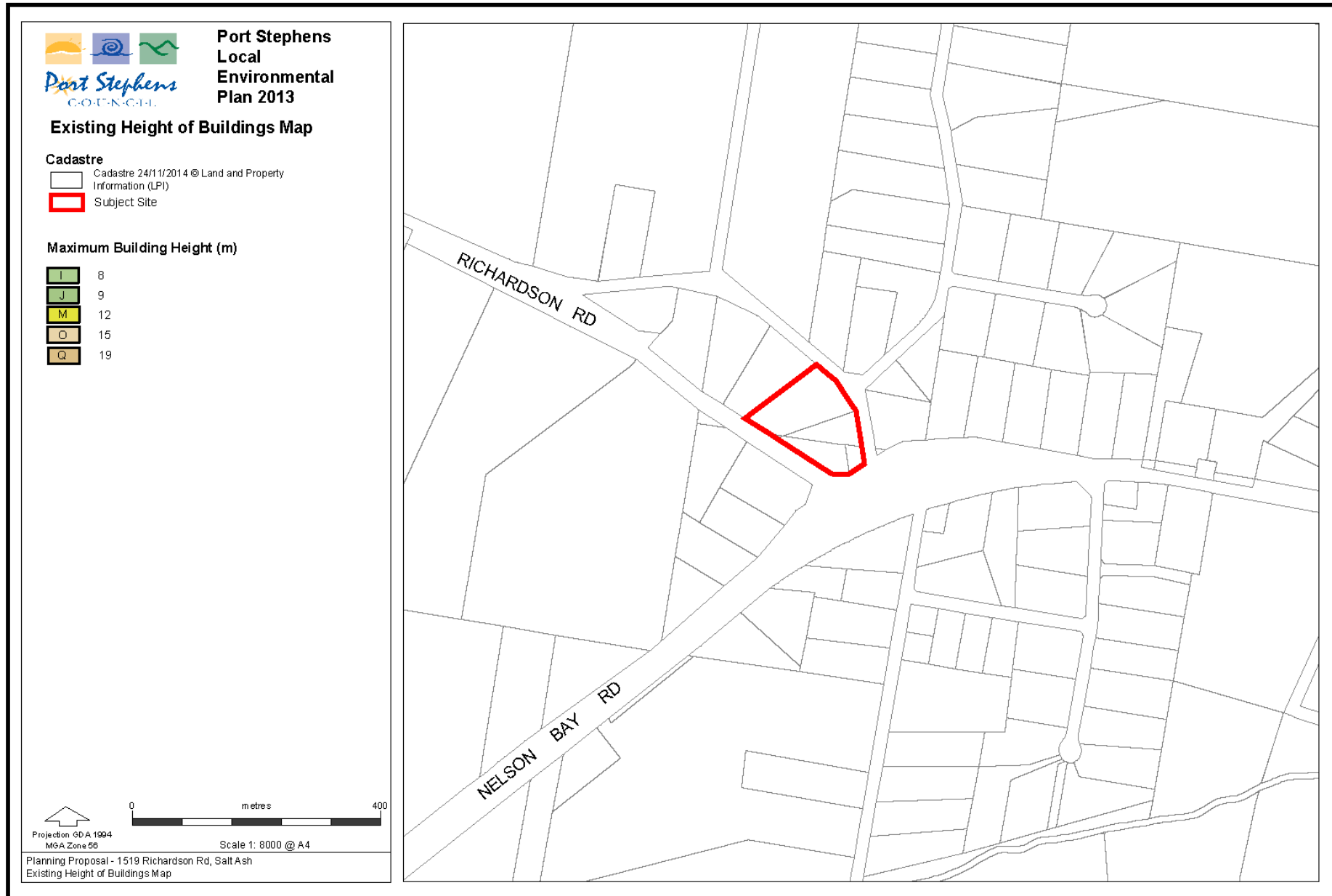
Attachment 7 – LSZ_004 – Proposed Minimum Lot Size Map



Attachment 8 – CLI_004 – Existing Additional Permitted Use Map







Attachment 11 – HOB_004 – Proposed Height of Building Map

