



APPIN AND NORTH APPIN PRECINCTS

Retail and Employment Study

Prepared for Walker Corporation
October 2022

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

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EXECUTIVE SUMMARY

Strategic Context

- Appin and North Appin precincts are situated within the Greater Macarthur region, which is earmarked for significant future residential development.
- Over the longer term, the Appin and North Appin precincts are forecast to accommodate over 21,000 residential dwellings.
- Significant greenfield residential development in the area will necessitate appropriate retail and employment development to support continued growth, generate jobs and support a strong community into the future.

Indicative Development Staging

- The retail hierarchy in the area is mooted to include a local centre and five neighbourhood centres across Appin and North Appin.
- Based on dwelling take up rates provided by Proponent, we estimate the first neighbourhood centre could be delivered by around 2030 when ~6,300 dwellings will be completed in Appin and North Appin.
- The first stage of Appin Local Centre (a single supermarket based centre) could commence by 2034 when ~11,500 dwellings will be completed in Appin and North Appin. By 2042, there would be sufficient market support for a major expansion to a single DDS based sub-regional shopping centres, including a modern format DDS and an additional full-line supermarket and small format supermarket.
- Other neighbourhood centre development would take place progressively over the development period to around 2060.

Future Growth Outlook

- The main trade area that could be served by Appin Local Centre is forecast to grow from around 5,500 residents at present to more than 90,500 over the very long term (~2060), underpinned by greenfield development in Appin, North Appin, and the southern part of Gilead.
- Retail spending growth will grow from \$86 million in 2022 to more than \$1.4 billion upon completion of the residential growth area.
- This spending will support the development of a range of retail centres across the area, including the Appin and North Appin precincts Local Centre and a network of smaller neighbourhood centres.

Employment Outcomes

- The development of a 30,000 sq.m local centre at Appin and North Appin precincts would support the ongoing employment of around 1,217 jobs. Further indirect jobs would be generated through suppliers and expenditure of those employed at the Local Centre.
- The Local Centre, the network of neighbourhood centres and the proposed expansion of the Appin employment zone, as well as the proposed employment zone of Moreton Park, have the potential to generate more than 12,800 jobs over the long term, with Moreton Park contributing around 10,000 jobs.
- The Appin and North Appin area is expected to support around 33,000 resident workers (on completion), while generating for around 4,550 local jobs within the Local and Neighbourhood Centres (around 14% of resident workers).

Market Demand

- An analysis of expected retention rates and market shares indicates that the Appin and North Appin area could potentially support a discount department store (DDS) and around eight supermarkets over the forecast period, at sustainable trading levels.
- Within Appin Local Centre, we estimate that a DDS, two full-line supermarkets and a small format supermarket could be supported by a range of mini-majors, retail specialties and non-retail and ancillary uses.
- The local centre could potentially be in the order of 30,000 sq.m of retail and ancillary non-retail floorspace.

Impact on Wilton Town Centre (Regional)

- An analysis of the trade area likely to be served by Wilton Town Centre (Regional Centre), and indicative dwelling take up timeframes provided by landowners, supports the development of major retail facilities within Wilton over the medium term.
- Wilton's main trade area population is expected to reach over 72,000 people by 2029, which would support the development of a single DDS based shopping centre.
- By 2044, the Wilton Town Centre is estimated to be able to support approximately 50,000 sq.m, serving a population of more than 145,000 persons. Comparatively, by 2044 Appin and North Appin are expected to serve a population of around 75,000 residents, which is half of Wilton's serving population.
- The development of retail facilities within Appin will not impede on the scale, mix, role or function of the Wilton Town Centre.
- Appin and North Appin also improve the viability of Wilton Town Centre as Appin residents will eventually use Wilton Town Centre for core services.

THE APPIN PROJECT

Overview

Greater Sydney's population is projected to grow to approximately 6.1 million by 2041 – over a million more people than currently live in the region.

The NSW Government has identified Growth Areas as major development areas that will assist in accommodating this growth. The Greater Macarthur Growth Area (GMGA) is one such growth area and is a logical extension of the urban form of south-west Sydney. The GMGA is divided into precincts. The Appin Precinct and North Appin Precinct are the southernmost land release precincts of the GMGA. The goal is to deliver 21,000+ dwellings.

The land is to be rezoned and released for development to achieve this goal. A submission has been prepared by Walker Corporation Pty Limited and Walker Group Holdings Pty Limited (the Proponent) to rezone 1,378 hectares of land (the site) within the Appin Precinct from RU2 Rural Landscape to the following zones:

Urban Development Zone

Zone 1 Urban Development (UD)

Special Purposes Zone

Zone SP2 Infrastructure (SP2)

Conservation Zone

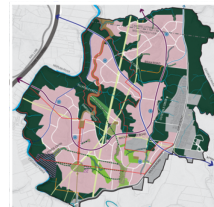
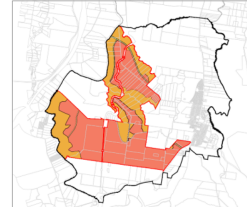

Zone C2 Environmental Conservation (C2)

The zonings are shown on the Appin (Part) Precinct Plan (the precinct plan). 'The precinct plan' will be incorporated into the State Environmental Planning Policy (Precincts – Western Parkland City) 2021 and contain the provisions (clauses and maps) that will apply to 'the site.' 'The precinct plan' envisages the delivery of 12,000+ new homes.

A structure plan has been prepared for the site and is shown on the Appin (Part) Precinct Structure Plan (the structure plan). It identifies staging and the first stage to be developed – Release Area 1. Release Area 1 is anticipated to deliver 3,500+ dwellings.

The submission is aligned with strategic land use planning, State and local government policies and infrastructure delivery. The development potential is tempered by a landscape-based approach that protects the environment and landscape values, shaping the character of new communities. A series of residential neighbourhoods are to be delivered within the landscape corridors of the Nepean and Cataract Rivers, supported by local amenities, transit corridors and community infrastructure.

The submission includes a hierarchy of plans. The plans and their purpose are summarised in the table on the right.

<p>(1) APPIN & NORTH APPIN PRECINCTS INDICATIVE PLAN</p> <p>Broader context and for information purposes only. It has no statutory weight. It identifies:</p> <ul style="list-style-type: none"> Higher-order transport network Centres hierarchy School sites Conservation areas Residential areas <p>Cultural sites and connections</p>	<p>(2) APPIN (PART) PRECINCT PLAN (THE PRECINCT PLAN)</p> <p>It shows the land proposed to be rezoned and incorporated into a new schedule in the Western Parkland City SEPP 2021.</p> <p>The precinct plan contains the development provisions (clauses and maps) applicable to the site and is used in assessing development applications.</p>
 <p>(21,000+ dwellings)</p>	 <p>(12,000+ dwellings)</p>
<p>(3) APPIN (PART) PRECINCT STRUCTURE PLAN (THE STRUCTURE PLAN)</p> <p>Structure plan for the site, showing staging of release areas.</p> <p>Development is to be generally consistent with the structure plan. It illustrates land use components including (but not limited to):</p> <ul style="list-style-type: none"> Low and medium-density residential Retail and employment centres School Open space Drainage network/basins <p>Transport network</p>  <p>(12,000+ dwellings) (Inc. Release Area 1 - 3,500+ dwellings)</p>	

Source: Walker Corporation

INTRODUCTION

Purpose

Urbis has been engaged by the Proponent to prepare a retail and employment strategy report to support a Structure Plan for the Appin Precinct.

The Appin Precinct is the southernmost precinct of the Greater Macarthur Growth Area (GMGA).

It immediately neighbours the suburbs of Gilead to the north, Wilton to the south and Douglas Park to the west. Dharawal National Park, a large protected national park, is located to the east. The site is predominately bound by waterways, with Mallaty Creek to the north, George's River to the east, Nepean River to the west and Cataract River to the south.

As part of the process, Urbis will assess retail floorspace demand and employment potential within the Appin Precinct.

This report examines and outlines the following:

- The regional and local context of Appin within the Greater Macarthur Area and having regard for most contemporary planning context.
- The trade area that will likely be served by future retail facilities in Appin and North Appin.
- An assessment of the demand and timing for retail uses within Appin and North Appin, and the resultant supportable floorspace and mix requirements for centres within the precinct.
- An analysis of the resultant employment levels within centres in Appin and North Appin, and considering self-containment rates.
- An assessment of potential impact on the scale and timing of Wilton Town Centre (Regional Centre).

Assumptions

In preparing this analysis, the following assumptions have been made:

- The study area covers the extent shown in the Trade Area Map on Page 12.
- The residential development within the study area is estimated to deliver 28,515 new dwellings based on the forecast take-up rates.
- Residential development at Gilead will start from the north and move towards the south. The study area will capture half of the remaining proposed dwelling after Lendlease's Figtree Hill development.
- The Gilead area covered by the study area will deliver 6,650 new dwellings in 2041 and will be completed in 2054 assuming a take-up rate of 500 new dwellings per annum from 2028.
- North Appin will deliver over 4,300 new dwellings by 2038 assuming a take-up rate of 200 new dwellings per annum starting in 2024 and increasing it to 300 per annum after 2026.
- Appin will deliver over 17,500 new dwellings in stages commencing in 2026 with a starting take-up rate at 500 dwellings and 1,000 dwellings per annum after 2026.
- Household size for new dwellings averages to 3.0 persons per household.
- The trade area served by Wilton Town Centre (Regional Centre) includes the broader Wilton precinct, Appin, North Appin and the established areas of Picton and Tahmoor.

01

LOCATION AND CONTEXT



APPIN – LOCAL AND REGIONAL CONTEXT

Overview

Appin is located some 74 km south-west of the Sydney CBD and 16 km south of the Campbelltown CBD. The area is serviced by Appin Road, a key arterial road that connects between South Western Sydney and the Illawarra. The M1 Motorway and the Hume Motorway are easily accessible from the area via Thirroul and Wilton Road, respectively.

The area is abundant in its flora and fauna with Dharawal National Park situated east of Appin Road. And, the coal mines, a major source of employment near the area, are also located east of Appin Road.

Currently, there is only one public school within Appin. Secondary school students travel to Campbelltown and other areas to attend high school. The closest tertiary institutions are the Western Sydney University at Campbelltown and Campbelltown TAFE.

Appin forms part of the broader Greater Macarthur Region, which is earmarked for significant future development over the long term.

Greater Macarthur & Macarthur 2040

Greater Macarthur Growth Area is composed of 12 precincts: seven urban renewal precincts from Glenfield to Macarthur and five land release precincts to the south of Campbelltown. The plans for most urban renewal precincts have been finalized and the Special Infrastructure Contributions schemes have been developed to assist fund state infrastructure to support new homes and jobs.

In order to promote growth in the Greater Macarthur area, the NSW Department of Planning, Industry and Environment has prepared Greater Macarthur 2040 to outline the strategic planning framework. The framework looks into the developments of transport, housing and other amenities with considerations for the landscape associated with each precinct.

Macarthur 2040 Plan identifies development opportunities across 12 precincts with delivery of approximately 35,000+ new homes in Appin and Gilead.

The land release precincts will be serviced by well-located local centres together with smaller facilities within the neighbourhood, providing community services, shopping and dining options to the future residents. These centres will be serviced by the proposed Transit Corridor identified in the Greater Macarthur 2040 Plan or collector roads.

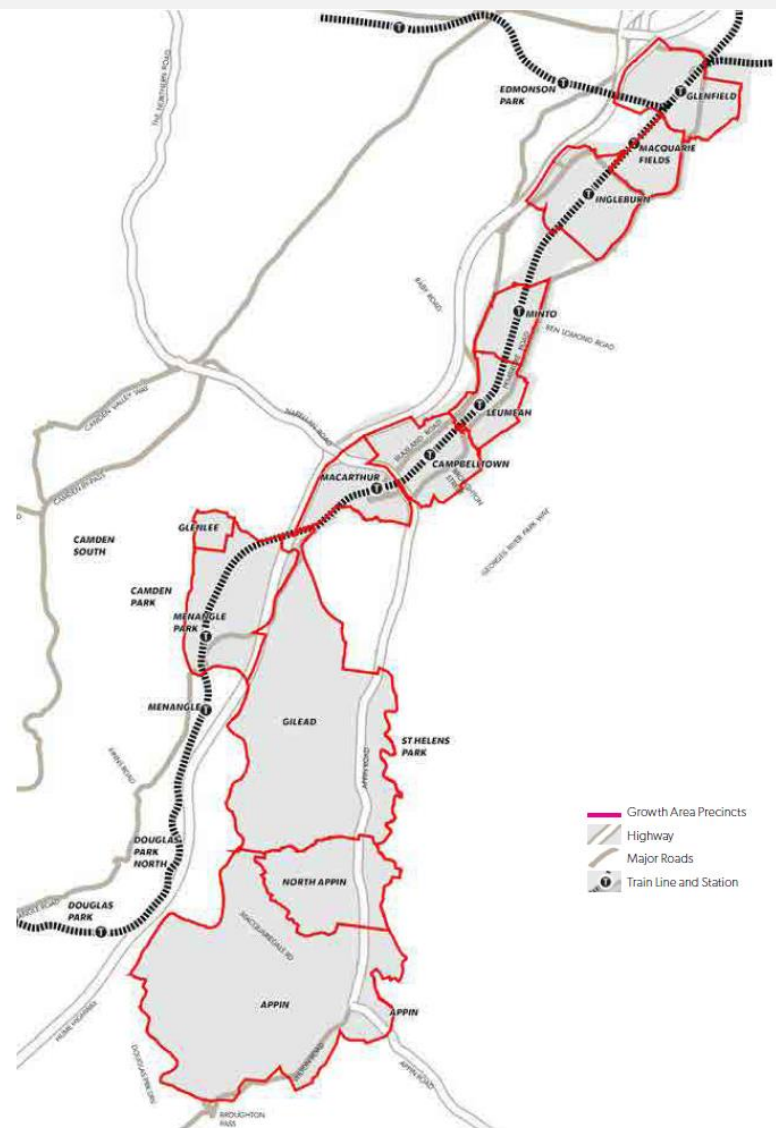
The document states that Gilead and Menangle Park are unlikely to have any major centre development due to its proximity to Campbelltown-Macarthur area. However, Appin and North Appin have the potential for the local centres to be developed into strategic centres. New local centres within the area will provide a mix of uses, including:

- Specialty shops
- Cafes and food services
- Offices and retail services
- Education, health facilities, leisure and civic uses.

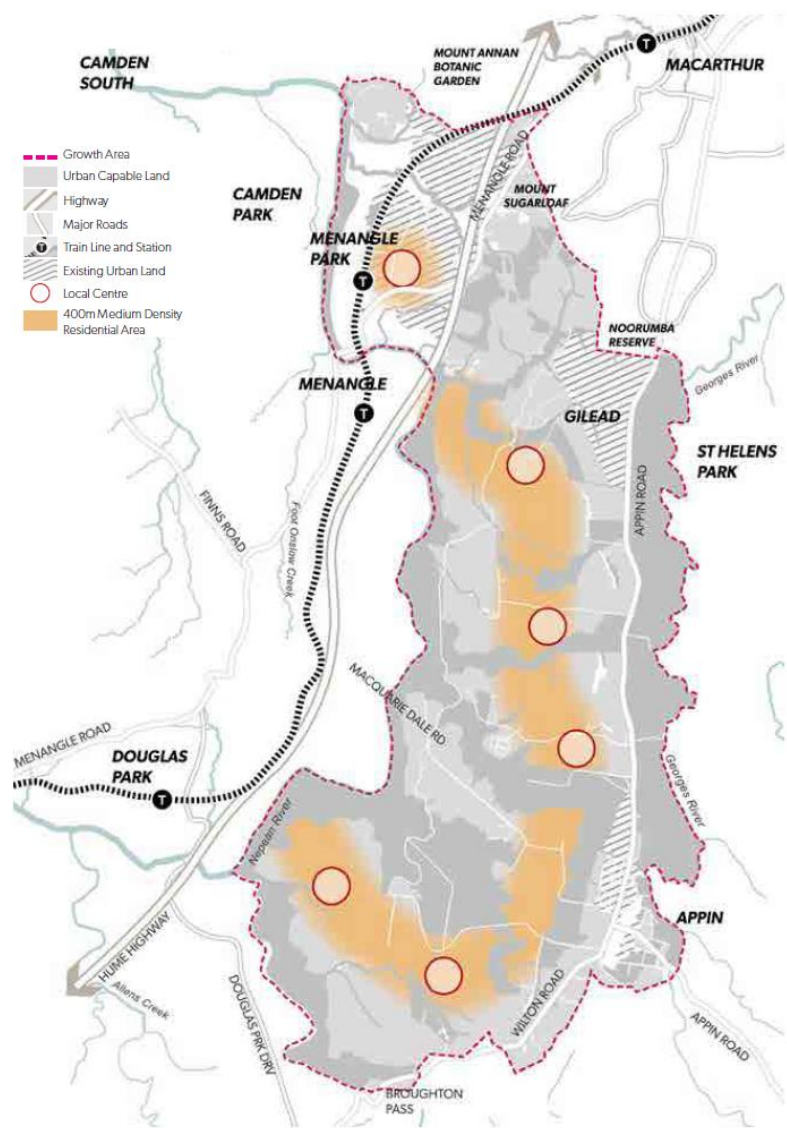
Wilton Growth Area, south of the Greater Macarthur Growth Area, has an earmarked major centre that will support around 50,000 sq.m of retail, commercial and community uses, including full-line supermarkets, specialty stores.

MACARTHUR 2040 - MAPPING

Greater Macarthur Region



Macarthur 2040 – indicative centres



02

TRADE AREA ANALYSIS



TRADE AREA DEFINITION

Overview

The map opposite identifies the main trade area that has been defined for a potential sub-regional scale shopping centre in Appin.

The key factors influencing the trade area are as follows:

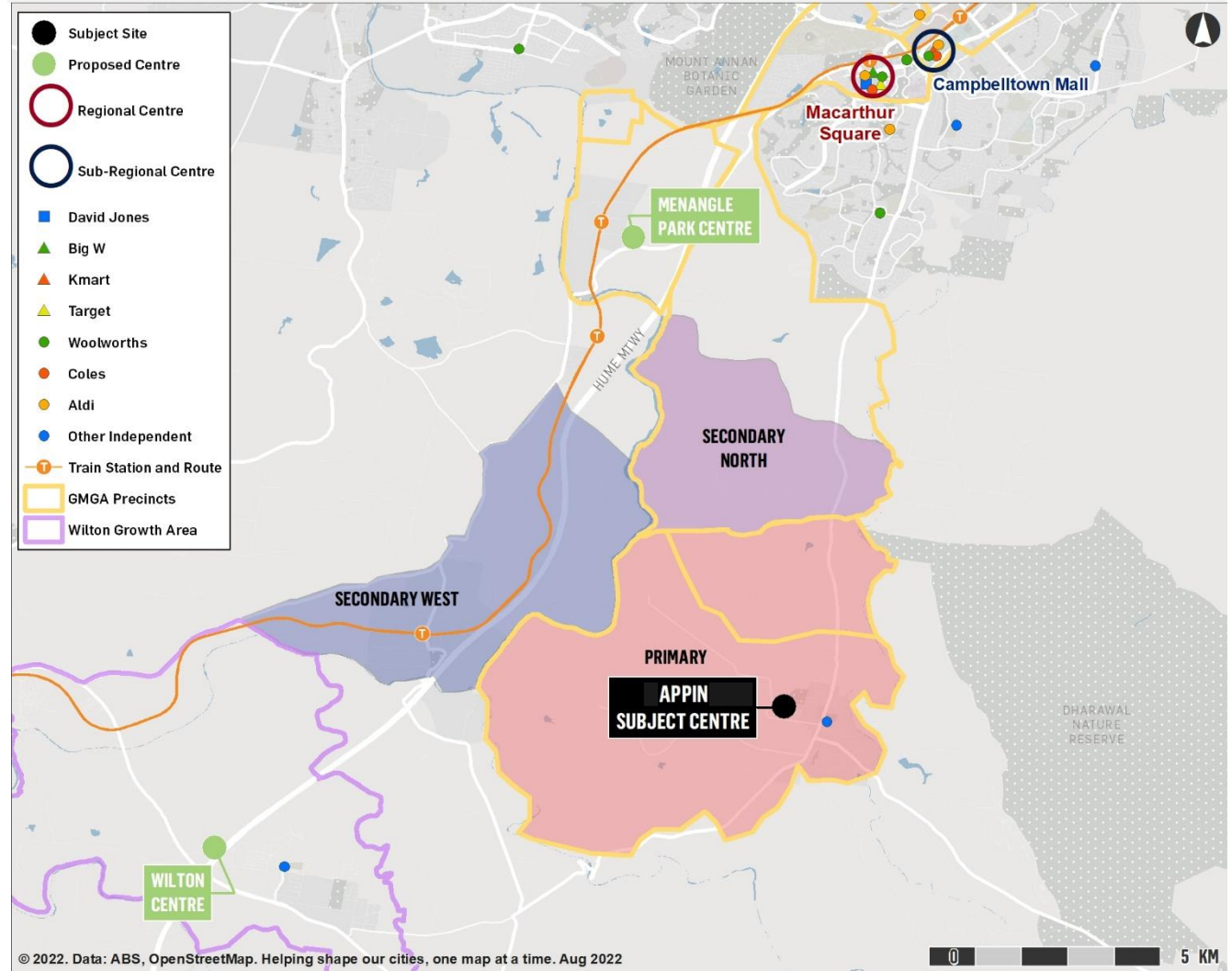
- The general accessibility of the site in terms of potential future road and public transport networks
- Geographic and other physical barriers such as motorways, bushlands, river etc.
- The existing and proposed competition within the area of relevance, including Menangle Park, Wilton and Campbelltown.

The trade area has been defined as follows:

- The **Primary trade area** comprises of Appin and North Appin precincts defined in the Greater Macarthur Plan. It is bounded by the Nepean River to the west, Mallaty Creek to the north and Cataract River to the south.
- The **Secondary North trade area** comprises of the southern portion of the Gilead precinct, but excludes the Mount Gilead area.
- The **Secondary West trade area** covers the area west of Nepean River and is bounded by Menangle Road to the west, Moreton Park Road to the north and Nepean River to the south. This is a relatively established area that is not identified for significant residential development.

In combination, the primary and secondary trade areas are referred to as the **Main Trade Area** throughout this report.

Trade Area Map



POPULATION FORECAST

Overview

The resident population has been projected using the dwellings provided by Proponent for the primary trade area and the dwellings projected in the Greater Macarthur 2040 Plan for the secondary trade area.

The main trade area population is forecast to reach 90,575 residents by the completion of all residential development. There is an increase of 85,035 residents by 2060.

No dwellings were proposed within the secondary west trade area and the population is projected to have very little to no change.

Population growth will mainly be driven by the:

- Proposed 21,865 dwellings in Appin and North Appin.
- An estimate of around dwellings of 6,650 in the secondary north sector which encompasses the southern part of Gilead.

Trade Area Population Forecast

	Population		Population Growth
	2022	On Completion	Additional
Primary:			
Total Primary	3,118	68,322	+65,204
Secondary:			
North	506	20,337	+19,831
West	1,916	1,916	-
Total Secondary	2,422	22,253	+19,831
Main Trade Area	5,540	90,575	+85,035

Source: ABS; NSW Department of Planning & Environment; Walker Corporation; Urbis

RETAIL SPENDING FORECAST

Overview

The table and chart opposite forecast the trade area spending in each trade area by product category. The impact of COVID-19 on retail spending estimates over the short to medium term has been accounted for in the forecast.

At present, it is estimated that the main trade area generates around \$86 million in retail expenditure.

Accounting for the significant residential development to take place in the region, total retail spending is forecast to reach approximately \$1.44 billion upon completion of the residential development.

Upon completion, the Primary trade area, which includes the Appin and North Appin release areas, is expected to account for more than 75% of the total retail spending in the trade area.

Food retail (e.g. spending on fresh food, groceries and packaged liquor) accounts for the highest proportion of spending within the trade area at 43%, resulting in \$625 million of expenditure upon completion.

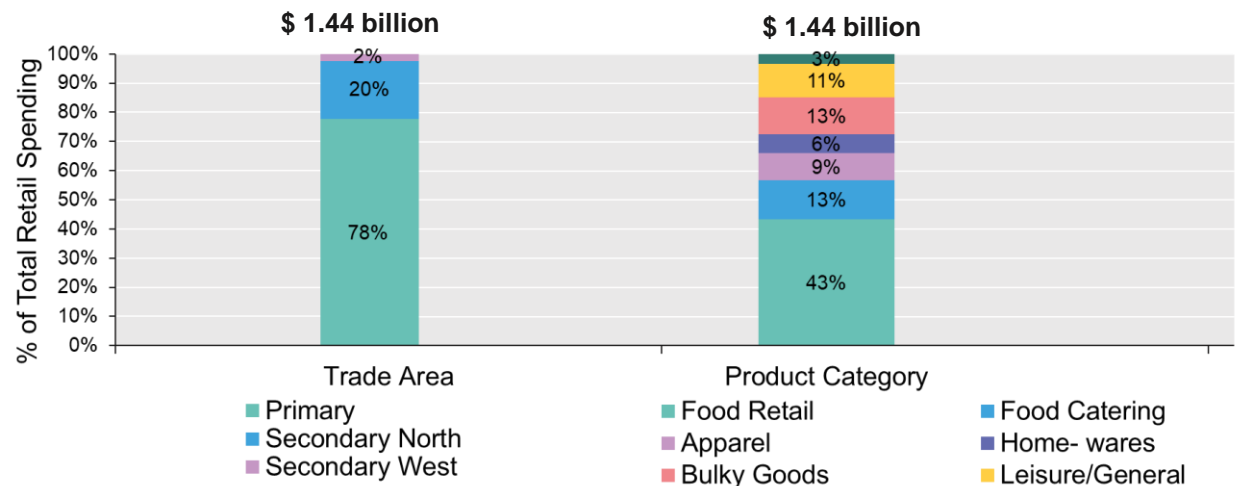
Trade Area Spending Forecast (\$2022)

Current (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	22	6	4	3	6	5	1	47
Secondary:								
North	4	1	1	0	1	1	0	7
West	14	4	3	2	4	4	1	31
Total Secondary	17	4	3	3	5	5	1	38
Total Trade Area	39	10	8	6	11	10	2	86

On Completion (\$M)	Food Retail	Food Catering	Apparel	Home-ware	Bulky Goods	Leisure/General	Retail Services	Total Retail
Total Primary	478	154	108	71	143	128	35	1,118
Secondary:								
North	133	32	23	18	36	33	11	287
West	14	5	3	2	4	4	1	33
Total Secondary	147	37	27	21	40	37	12	320
Total Trade Area	625	191	135	91	184	165	46	1,438

Source : ABS; MarketInfo; Urbis

Retail Spending Market Composition (on completion)



COMPETITIVE CONTEXT

Appin

At present, Appin has a 1,500 sq.m IGA and a small collection of retail tenancies on Appin Road servicing the convenience and top up shopping needs of residents within the trade area.

Currently, local residents are required to leave the area to undertake higher order retail shopping, including accessing full-line supermarket, DDS shopping, apparel and leisure shopping etc.

A range of neighbourhood centres are envisioned across the Appin area, as per the Macarthur 2040 documentation, though there is potential for Appin, North Appin or South Gilead to become a strategic centre.

Wilton/Picton/Tahmoor

Wilton

Currently Wilton is serviced by Wilton Plaza which has a small supermarket of 500 sq.m and convenience retail and dining options.

Wilton Town Centre (Regional Centre) is earmarked to be developed into a 50,000 sq.m town centre by 2046, including a range of retail, business and community uses to service the region.

Picton

The largest consolidated retail offer in Picton is Picton Mall, anchored by a 1,100 sq.m Kmart K Hub and a 2,900 sq.m Coles supermarket.

Other retail facilities in Picton are primarily centred on the Old Hume Highway, including an IGA supermarket, convenience retail and cafes and restaurants.

Tahmoor

Tahmoor Town Centre includes a Woolworths supermarket and supporting specialty retail.

Other retail uses within the town centre include a standalone Aldi, a small Foodworks supermarket and a range of small, independent cafes and restaurants.

Menangle Park/Gilead

Menangle Park and Gilead do not have any existing supermarket in the area.

However, as the precinct becomes developed over the longer term, it will support a mix of neighbourhood centres, which are expected to comprise the following:

- A small supermarket
- Up to 2,000 sq.m of specialty shops, cafes and food services
- Education and child care
- Local health services
- Recreational space and facilities.

Campbelltown-Macarthur

The Campbelltown – Macarthur area has a significant retail provision with two major shopping centres providing residents in the area with a vast range of higher order shopping, dining and entertainment options.

Macarthur Square (Regional Centre) supports around 95,000 sqm of retail floorspace, including a David Jones department store (6,900 sq.m), two Discount Department Stores (14,200 sq.m) and three supermarkets (10,400 sq.m).

Campbelltown Mall comprises a Kmart store (8,200 sq.m) and three supermarkets (10,000 sq.m).

In addition to the above shopping centre, the area is also serviced by smaller convenience orientated retail centres as well as a substantial retail strip along Queen Street.

03

RETAIL DEMAND ANALYSIS



DISCOUNT DEPARTMENT STORE CAPACITY ASSESSMENT

Overview

The tables on the right assess the potential for a discount department store (DDS) within Appin Local Centre.

Upon completion of the residential development, main trade area residents are estimated to spend approximately \$103 million on DDSs.

Applying average retention rates across the trade area, it is estimated that around \$37 million of DDS turnover could be retained in the Appin Local Centre, with some leakage to other centres such as Wilton and Campbelltown-Macarthur.

The average floor area of modern format DDS is in the order of 7,000 sq.m. As such, a DDS at the Appin Local Centre could potentially achieve a sustainable productivity of around \$5,300 per sq.m, upon completion of the residential development in the area.

Appin Local Centre DDS Capacity & Market Share Assessment

Trade Area DDS Spending			Local Centre DDS Market Share		
		\$M		%	\$M
Primary		81.1	Primary	100%	28.4
Secondary North		19.9	Secondary North	100%	5.0
Secondary West		2.5	Secondary West	100%	0.6
Total		103.5	Sub Total		34.0
Spend Retention by Trade Area DDSs			+ Turnover from Beyond (@5%)	5%	1.8
	%	\$M	+ F&G Turnover (@4%)	4%	1.5
Primary	35%	28.4	Total Store Potential		37.3
Secondary North	25%	5.0	DDS Floorspace at Local Centre		
Secondary West	25%	0.6	DDS 1		7,000
Sub Total		34.0	Total Floorspace	sq.m	7,000
+ Turnover from Beyond (@5%)	5%	1.8	Productivity (Indicative)	\$ per sq.m	\$5,322
+ F&G Turnover (@4%)	4%	3.3			
Available Turnover to Trade Area DDSs		37.3			
Indicative Trade Area DDSs					
		sq.m			
Local Centre DDS 1		7,000			
Existing Trade Area DDS's		-			
Total DDS Floorspace		7,000			
Productivity - All DDSs (\$ per sq.m)		\$5,322			

SUPERMARKET CAPACITY ASSESSMENT

Overview

The tables opposite show an assessment of supermarket capacity for the Appin and North Appin precincts.

Total supermarket spending is estimated to reach \$344 million upon completion of the residential development.

Within the primary trade area, supermarkets within Appin and North Appin are expected to be able to retain the lion's share of supermarket expenditure, while higher levels of leakage are expected across the Secondary North and Secondary West sectors given their proximity to competing retail facilities and accessibility to major centres.

Around \$275 million of supermarket turnover can be retained within the Appin and North Appin precincts, upon completion of the residential development.

This retained supermarket spend would be distributed across a range of retail facilities within the trade area, possibly totalling some 21,500 sq.m of supermarket floorspace, including the existing Appin Supa IGA.

Of retained spending, Appin Local Centre is estimated to achieve a 45% market share of primary supermarket spending and a 25% share of secondary trade area supermarket spending. This indicates that the local centre has the potential to generate supermarket turnover levels in the order of \$114 million. Assuming a mix of two full-line stores (each of 4,000 sq.m) and a smaller format supermarket (of 1,500 sq.m), the resultant productivity rate would be in the order of \$12,000 per sq.m.

Appin and North Appin Trade Area Capacity & Supermarket Market Share Assessment

Trade Area Supermarket Spending	\$M
Primary	260.5
Secondary North	76.2
Secondary West	7.5
Total	344.2

Supermarkets	%	\$M
Primary	70%	182.4
Secondary North	50%	38.1
Secondary West	20%	1.5
Sub Total		222.0
+ Turnover from Beyond (@5%)	5%	11.7
+ Liquor Turnover (@5%)	5%	13.7
+ General Merc. Turnover (@10%)	10%	27.5
Supermarkets		274.9

Indicative Trade Area Supermarkets	sq.m
Local Centre Full Line Supermarket 1	4,000
Local Centre Full Line Supermarket 2	4,000
Local Centre Small Supermarket	1,500
Neighbourhood Centre 1	3,750
Neighbourhood Centre 2	2,250
Neighbourhood Centre 3	1,500
Neighbourhood Centre 4	1,500
Neighbourhood Centre 5	1,500
Existing Trade Area Supermarket	1,500
Total Supermarket Floorspace	21,500
Productivity - All Smkts (\$ per sq.m)	\$12,785

Local Centre Market Share	%	\$M
Primary	45%	82.1
Secondary North	25%	9.5
Secondary West	25%	0.4
Sub Total		92.0

+ Turnover from Beyond (@5%)	5%	4.8
+ Liquor Turnover (@5%)	5%	5.7
+ General Merc. Turnover (@10%)	10%	11.4
Total Store(s) Potential		113.9

Supermarket Floorspace at Local Centre

Supermarket 1	sq.m	4,000
Supermarket 2	sq.m	4,000
Supermarket 3	sq.m	1,500

Total Floorspace	sq.m	9,500
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Productivity (Indicative)	\$ per sq.m	\$11,989
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RETAIL FLOORSPACE DEMAND AND TIMING ANALYSIS

Overview

The table opposite shows the indicative floorspace mix that the market can support at the Appin Local Centre.

Having established the potential capacity for major tenant floorspace within the Appin Local Centre, Urbis has applied benchmark ratios between anchor tenant floorspace and other uses to derive the total quantum of gross leasable area (GLA) that could be supported within the Local Centre.

The Appin Local Centre could support 30,400 sq.m of retail and ancillary non-retail floorspace at capacity, including the following:

- 7,000 sq.m DDS
- 9,500 sq.m of supermarket floorspace
- 2,300 sq.m of mini-major floorspace
- 6,400 sq.m of retail specialty floorspace
- 5,200 sq.m of non-retail and ancillary floorspace, including a mix of gym, medical, childcare, personal services, entertainment, civic and office floorspace

Appin Local Centre Indicative Floorspace Mix

Anchor	sq.m
Discount Department Store	7,000
Supermarket	9,500
Total Major	16,500
Mini-Majors	2,300
Specialties	sq.m
Food Specialties	1,900
Non-Food Specialties	3,600
Retail Services	900
Non-Retail & Ancillary	5,200
Total Centre	30,400
Floorspace Summary	sq.m
Anchor and Mini Majors	18,800
Specialty Retail	6,400
Non-Retail & Ancillary	5,200
Total Floorspace	30,400

RETAIL FLOORSPACE DEMAND AND TIMING ANALYSIS

Overview

Assuming that the Appin Local Centre's turnover performance will be comparable to current benchmark rates, the table on the right shows indicative market shares by product group and trade area sector for the proposed Appin centre.

Appin centre has the potential to achieve 16% market share of total spending in the primary trade area and a 14% market share of total spending in the main trade area.

These market shares are reasonable given the nature of development (greenfield urban fringe) and the provision of existing and future competitive facilities (Macarthur Square, Campbelltown Mall, the future Wilton Town Centre etc).

Indicative Market Shares by Product Group

	Primary Trade Area	Main Trade Area
Food Retail	22%	19%
Food Catering	6%	6%
Apparel	22%	21%
Homewares	19%	18%
Bulky Goods	3%	3%
Leisure/General	15%	14%
Retail Services	22%	18%
Total	16%	14%

Source: Urbis

RETAIL FLOORSPACE DEMAND AND TIMING ANALYSIS

The table below shows the indicative timing of stages for Appin Local Centre and other neighbourhood centres in the area, based on the trade area population forecast.

In 2030, a 3,750 sq.m supermarket anchored neighbourhood centre could be introduced when the population in the primary trade area is expected to reach around 22,000 residents.

The first stage of the Appin Local Centre, including a full-line supermarket, could be supported by around 2034, with a primary trade area population of over

37,000.

By 2038, a second 2,250 sq.m supermarket anchored neighbourhood centre could be supported, based on population projections.

The second stage of the Appin Local Centre could be supported in 2042, including a second full line supermarket, a small format supermarket and a 7,000 sq.m DDS.

The further three remaining smaller neighbourhood centres could be developed progressively over the development period, with one supportable by 2046

and the remaining two neighbourhood centres supportable by 2050.

Around 500 to 1,000 sq.m of other floorspace has also be considered at each neighbourhood centre, which could include the likes of urban services, non-retail showrooms, servicing and light industrial uses, driving additional employment in the centre and increasing amenity for surrounding residents.

Appin and North Appin – Population and Indicative Retail Floorspace Timing

Population	2022	2026	2030	2034	2038	2042	2046	2050	2054
Primary	3,118	6,398	21,905	37,412	52,919	65,307	68,322	68,322	68,322
Secondary North	506	506	506	506	506	2,444	8,409	14,373	20,337
Secondary West	1,916	1,916	1,916	1,916	1,916	1,916	1,916	1,916	1,916
Total	5,540	8,820	24,327	39,834	55,341	69,667	78,647	84,611	90,575

Retail (Sq.m)	2022	2026	2030	2034	2038	2042	2046	2050	2054
Discount Department Store	0	0	0	0	0	7,000	7,000	7,000	7,000
Supermarket	0	0	3,750	7,750	10,000	15,500	17,000	20,000	20,000
Mini Majors and Retail Specialties	0	0	1,875	4,064	5,189	11,661	12,411	13,911	13,911
Non-retail & Ancillary*	0	0	625	2,375	2,750	6,151	6,401	6,901	6,901
Total Centre	0	0	6,250	14,189	17,939	40,311	42,811	47,811	47,811
Other Floorspace**	0	0	1,250	1,250	2,000	2,000	2,500	3,500	3,500

*Includes centre based non-retail such as medical centre, gym, bank, post office etc.

**Includes non-centre and non-retail based uses such as urban services, mechanics, showrooms etc

Neighbourhood Centre 1

Appin Local Centre
Full line supermarket 1

Neighbourhood Centre 2

Appin Local Centre
Full line supermarket 2, small format
supermarket & DDS

Neighbourhood Centre 3

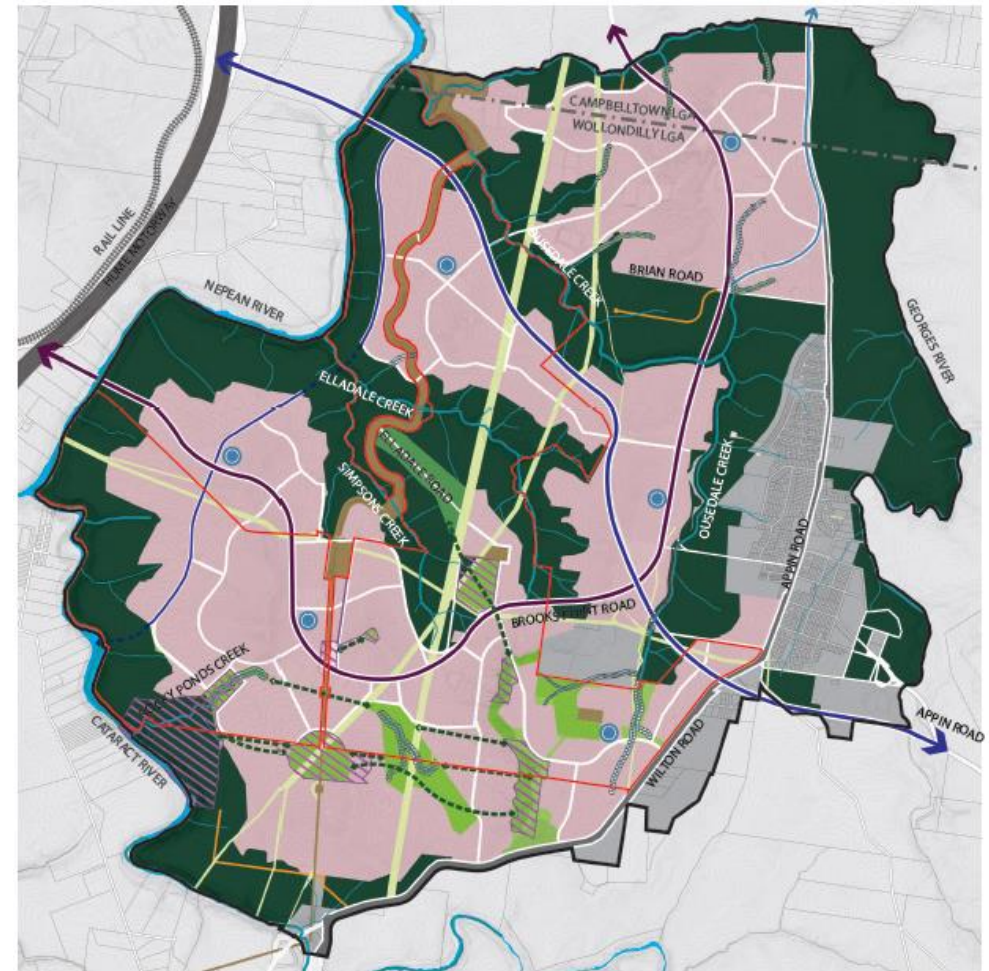
Neighbourhood Centre 4 & 5

INDICATIVE RETAIL CENTRE LOCATIONS

Guiding principles for retail centre locations

In reviewing the indicative plan for centres across the Appin and North precincts, it is important to look at the themes and elements considered critical in delivering a successful and sustainable greenfield retail development, as outlined below:

- **Accessibility** – Accessibility is a key consideration for local and neighbourhood centre development within greenfield locations. If a centre is too internalised within a suburb, or lacks exposure to passing trade, this will typically result in poor performance and operational outcomes (higher levels of tenant churn and vacancy). A prominent location on transit corridors, arterial routes or major local roads is desirable, with simple and efficient ingress and egress from all directions (not just left in-left out), to capitalise on vehicular flows in both directions (to home and to work).
- **Timing** – Retail centres can be developed and operate prior to the immediate catchment fully establishing, though this will result in lower performance over the short term until the catchment reaches the requisite population thresholds. Early retail amenity and activation can support residential development and creates a more attractive product for potential residents.
- **Land use mix** – collocating centres near public open space, schools, community and recreation facilities is desirable and facilitates higher levels of cross-utilisation.



LEGEND:

Appin & North Appin Precincts Boundary	Green Links	East-West Connection Road
Appin (Part) Precinct Boundary	Riparian Corridor	Public Transport Corridor
LGA Boundary	Planned State Heritage Listing Sites	North-South Connection Road
Waterways	Heritage Items	Appin Bypass
C2 Conservation Land*	Residential	Road Connection - By Others
District Open Space	Excluded Land	Collector Roads
Regional Open Space	Mixed Use Centres (including retail/commercial, schools and open space)	
Easements (Potential for active and passive recreation)		

* Where located outside Appin (Part) Precinct Boundary this represents Strategic Conservation Planning SEPP - Avoided Land (August 2022).

APPIN & NORTH APPIN PRECINCTS INDICATIVE PLAN

1:40,000 @ A4
DATE: 05-10-22
REVISION NO: 8

04

EMPLOYMENT & RESIDENT BENEFITS



EMPLOYMENT ANALYSIS

Overview

Based on the industry benchmarks of employment densities, the proposed Appin Local Centre is expected to generate over 1,200 direct operational jobs while the proposed neighbourhood centres network could support 770 direct operational jobs upon completion.

This number does not account for the indirect jobs generated through suppliers and expenditure of those employed with the Appin Local Centre.

In addition to employment benefit, the proposed development will also deliver a number of benefits for the residents.

- Appin residents will have more options for shopping and dining and receive potential benefits in terms of price and quality of offer due to increased retail competition in the area
- Locals will also have better accessibility with enhanced parking and other transport arrangement.
- Ancillary and non-retail uses like gyms and medical centres will contribute to the well-being of the community
- With increased retail provision in the area, the residents will no longer need to travel outside of the area for shopping, lowering the travel time and cost, and environmental impacts.
- The provision of more jobs, closer to home will allow residents to work locally, reducing the need to travel further afield to work and also alleviate pressure on the broader road network.

Ongoing Retail Employment Generation – Appin Local Centre

Type of Use	Employment per '000 sq.m	Proposed Centre	
	Industry Average	GLA (sq.m)	Employment (no.)
DDS(s)	23.5	7,000	165
Supermarket(s)	40.8	9,500	388
Mini-Majors	23.5	2,300	54
Specialty Shops	60.7	6,400	388
Ancillary and Non-Retail	42.7	5,200	222
Total		30,400	1,217

Source: Urbis

Note: Excludes additional management, cleaning & security staff

Ongoing Retail Employment Generation – Neighbourhood Centres

Type of Use	Employment per '000 sq.m	Proposed Centre	
	Industry Average	GLA (sq.m)	Employment (no.)
Supermarket(s)	40.8	10,500	428
Mini-Majors & Specialties	50.8	5,250	267
Ancillary and Non-Retail	42.7	1,750	75
Total		17,500	770

Source: Urbis

Note: Excludes additional management, cleaning & security staff

EMPLOYMENT ANALYSIS – SELF CONTAINMENT

The table below details the employment self-containment rates for urban fringe areas across Sydney and other capital cities that are similar to what is envisioned at Appin.

Each of these areas include sub-regional retail facilities of varying scales, within established or emerging residential areas.

At present, only 12% of jobs within the Appin area are by local residents (i.e. those who live and work in Appin), though there is a wide range across the various industry sectors.

For example, industries such as Agriculture, Forestry

and Fishing (68%) and Mining (42%) have a much higher rate of job containment than industries like Manufacturing (7%), Wholesale Trade (6%), Public Administration and Safety (5%) and Retail Trade (10%).

At 10%, the current Retail Trade job containment is considerably lower than the other centres assessed, with area like Richmond/Windsor, Narellan and Pakenham having job containment rates over 33%.

Given the majority of jobs to be supported within the future Appin Local Centre will be within the Retail Trade industry, this presents a significant opportunity

for local residents. Of the 1,550 resident workers employed in the Retail Trade industry, only 150 are employed locally. The provision of more than 1,000 direct Retail Trade and Local Centre related jobs (including Financial and Insurance Services, Rental Hiring and Real Estate Services, Healthcare etc) upon completion will facilitate a significant increase in employment self containment.

These local jobs closer to home will only alleviate pressure on the broader road network, but it will support the development of a strong local community and economy.

Share of workers who live and work in the area by industry

	Richmond/ Windsor	Rouse Hill	Narellan	Camden	Craigieburn (VIC)	Pakenham (VIC)	Springfield Lakes (QLD)	Average	Appin
Agriculture, Forestry and Fishing	41%	48%	16%	36%	3%	19%	14%	25%	68%
Mining	20%	6%	8%	0%	0%	10%	0%	6%	42%
Manufacturing	34%	12%	15%	7%	7%	22%	2%	14%	7%
Electricity, Gas, Water and Waste Services	23%	11%	16%	3%	3%	7%	0%	9%	10%
Construction	22%	22%	27%	21%	17%	23%	10%	20%	17%
Wholesale Trade	17%	10%	17%	10%	6%	13%	7%	11%	6%
Retail Trade	42%	23%	33%	19%	24%	34%	20%	28%	10%
Accommodation and Food Services	63%	33%	41%	37%	27%	37%	38%	39%	13%
Transport, Postal and Warehousing	21%	21%	19%	15%	13%	23%	5%	17%	11%
Information Media and Telecommunications	49%	7%	16%	14%	12%	20%	16%	19%	7%
Financial and Insurance Services	20%	6%	10%	29%	6%	15%	20%	15%	6%
Rental, Hiring and Real Estate Services	39%	19%	29%	23%	20%	29%	30%	27%	12%
Professional, Scientific and Technical Services	37%	19%	27%	32%	14%	28%	14%	24%	17%
Administrative and Support Services	36%	30%	24%	27%	15%	27%	18%	25%	19%
Public Administration and Safety	43%	4%	7%	8%	6%	11%	2%	11%	5%
Education and Training	31%	16%	19%	14%	25%	27%	20%	22%	16%
Health Care and Social Assistance	38%	9%	15%	30%	16%	24%	13%	21%	11%
Arts and Recreation Services	50%	15%	34%	10%	17%	32%	9%	24%	13%
Other Services	38%	21%	32%	24%	14%	28%	18%	25%	18%
Total	35%	17%	22%	20%	15%	25%	14%	21%	12%

Source: ABS Census, Urbis

POTENTIAL ADDITIONAL EMPLOYMENT AREAS

Overview

An expansion of employment land is proposed in Appin and Moreton Park which will increase the number of jobs within the Wollondilly LGA.

The existing employment area in Appin is expected to deliver an additional 44 hectares of developable land. While the mooted Moreton Park Employment Zone could deliver around 255 hectares of developable land.

The table on the top-right shows the gap between jobs and resident workers within Wollondilly LGA (i.e. job leakage from the LGA).

The gap has increased by 34% between 2011 and 2016. The number of jobs within Wollondilly LGA is unable to keep up with the increasing number of resident workers in Wollondilly LGA.

Retail Trade has recorded an increase in gap from 2,039 to 2,268, resulting in resident workers in the retail trade industry to leave the LGA due to the lack of jobs.

The table on the bottom-right represents the number of jobs that are leaving the LGA and the potential future jobs that will be generated upon completion of Appin and Moreton Employment Zones.

With an increase in the number of jobs available closer to home, the LGA will be able to capture the resident workers that are leaving the LGA and increases the LGA's employment containment.

Jobs vs Resident workers in Wollondilly LGA

	2011			2016		
	Jobs	Resident Workers	Gap	Jobs	Resident Workers	Gap
Agriculture, Forestry and Fishing	522	479	43	653	552	101
Mining	1,449	434	1,015	1,424	387	1,037
Manufacturing	1,415	2,585	-1,170	909	1,948	-1,039
Electricity, Gas, Water and Waste Services	209	317	-108	220	345	-125
Construction	1,274	1,896	-622	1,475	3,540	-2,065
Wholesale Trade	282	885	-603	178	722	-544
Retail Trade	797	2,039	-1,242	835	2,268	-1,433
Accommodation and Food Services	524	974	-450	619	1,137	-518
Transport, Postal and Warehousing	484	1,245	-761	541	1,451	-910
Information Media and Telecommunications	41	148	-107	48	178	-130
Financial and Insurance Services	104	485	-381	77	586	-509
Rental, Hiring and Real Estate Services	124	344	-220	134	410	-276
Professional, Scientific and Technical Services	470	975	-505	478	1,097	-619
Administrative and Support Services	215	421	-206	316	704	-388
Public Administration and Safety	361	1,175	-814	422	1,472	-1,050
Education and Training	843	1,698	-855	924	2,173	-1,249
Health Care and Social Assistance	594	2,054	-1,460	732	2,354	-1,622
Arts and Recreation Services	181	270	-89	179	305	-126
Other Services	371	876	-505	413	1,042	-629
Total	10,260	19,300	-9,040	10,577	22,671	-12,094

Source: ABS; Urbis; Walker Corporation

42% OF WOLLONDILLY LGA WORKERS LIVE OUTSIDE THE LGA

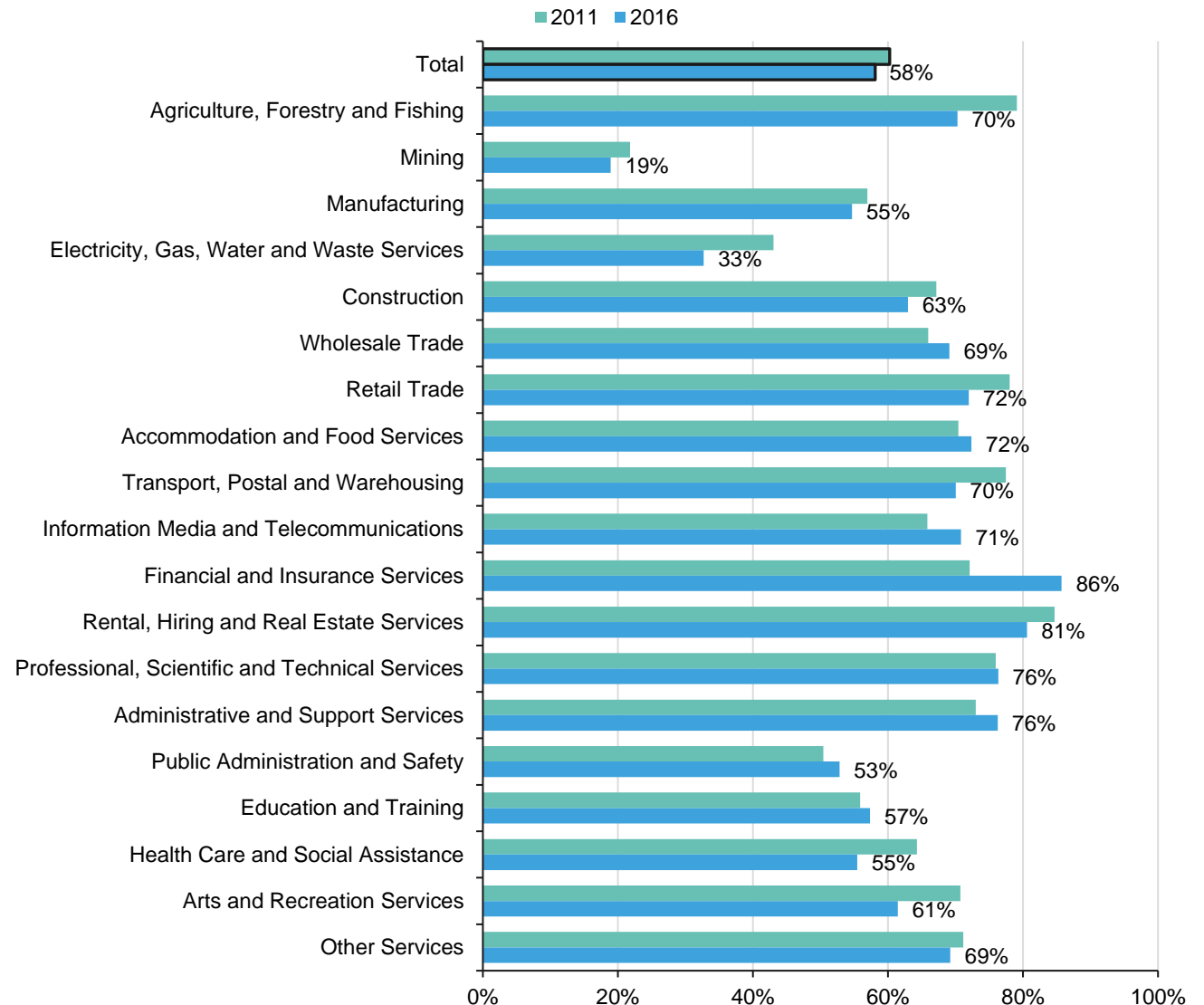
Employment Containment

The chart of the right illustrates the proportion of Wollondilly LGA workers who live within the Wollondilly LGA, as at the 2016 Census. Key findings include:

- Wollondilly LGA residents held 58% of jobs within the LGA, with the remaining 42% held by residents from elsewhere
- The industries with the lowest proportion of jobs held by LGA residents include Mining (19%), and Electricity, Gas and Water Services (33%).

The chart also shows the change in employment containment in the LGA between 2011 and 2016. Employment containment has declined by 2% across the LGA in this period, as a higher proportion of jobs are held by residents elsewhere in Sydney and beyond.

Wollondilly LGA Workers that Live in the LGA



Source: ABS Census, Urbis

73% OF WOLLONDILLY LGA RESIDENT WORKERS WORK OUTSIDE THE LGA

Resident Worker Containment

The chart on the right shows the proportion of Wollondilly LGA resident workers who work within Wollondilly LGA, as at the 2016 Census. Key findings include:

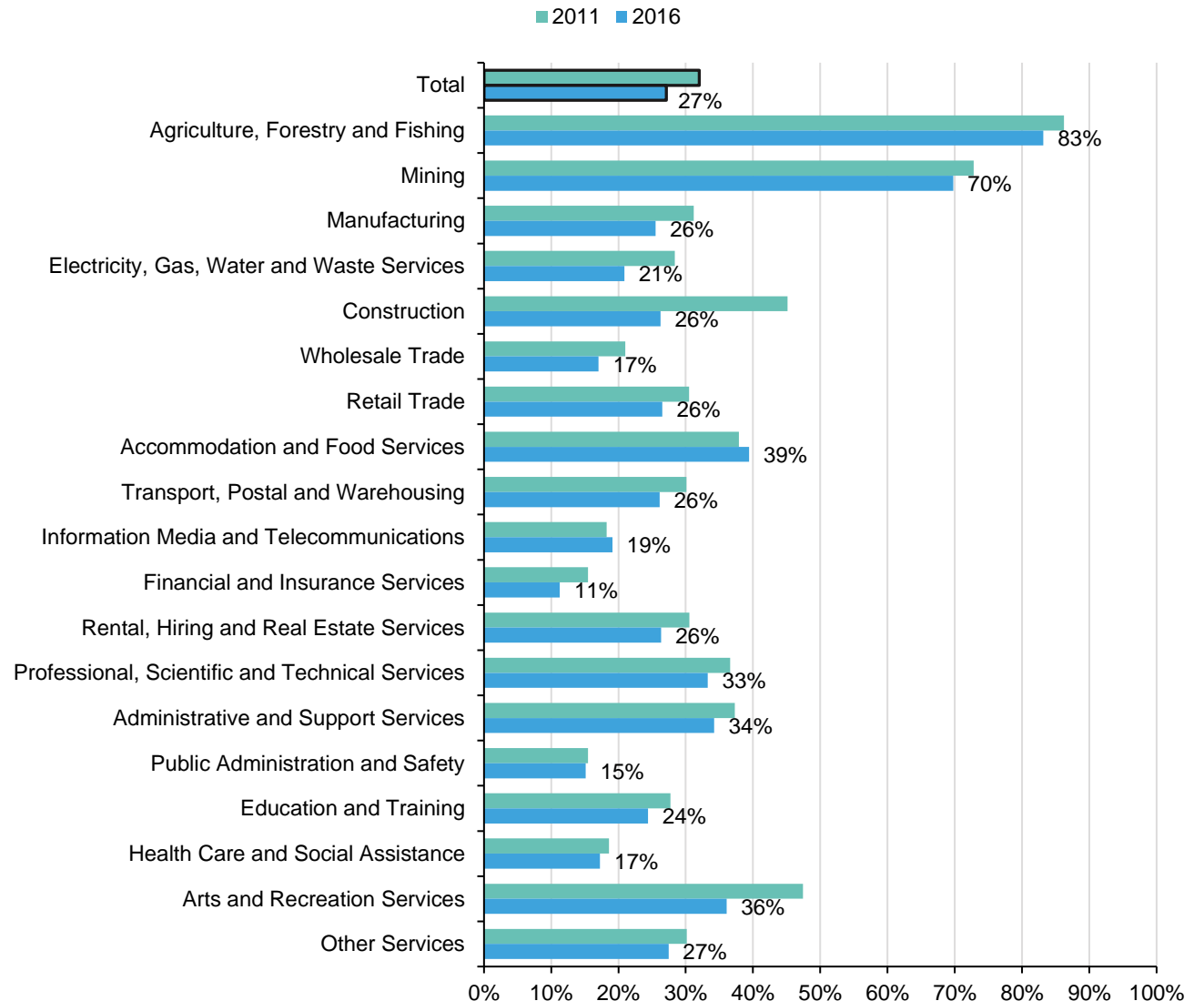
- 27% of Wollondilly LGA resident workers had jobs within the LGA, with the remaining 73% travelling outside the LGA for work
- Across industrial industries, between 17% and 26% of LGA resident workers had jobs within the LGA
- Industrials with the lowest resident worker containment include Financial and Insurance Services, and Public Administration and Safety, at 11% and 15% of resident workers, respectively.

The chart also shows the change in employment self-containment in the LGA between 2011 and 2016.

Resident worker containment has decreased over the five year period from 32% in 2011 to 27% in 2016. All industries except Accommodation and Food Services and Information Media and Telecommunications experienced a decline in resident worker containment.

Despite an increase in the resident workers in the Wollondilly LGA, the number of resident workers working in the LGA has slightly decreased, which indicates the limited jobs across the industries within the LGA.

Wollondilly LGA Resident Workers that Work in the LGA



THERE IS A DEFICIT IN THE AVAILABLE JOBS FOR RESIDENTS ACROSS ALL SECTORS

Key Findings

There is a significant jobs deficit across most industry sectors in the Wollondilly LGA, as shown in the chart opposite.

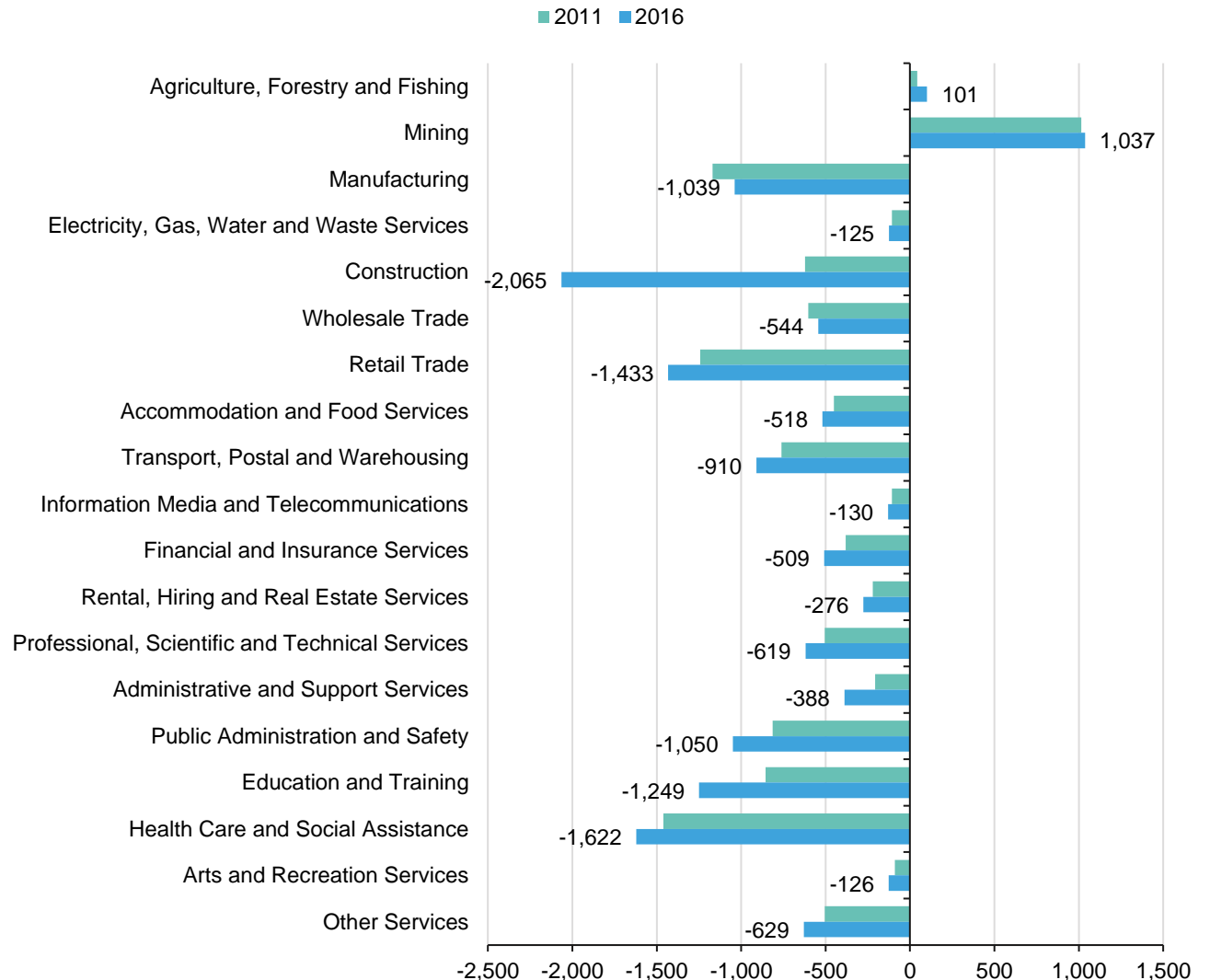
Key findings include:

- The large job deficit in 2016 is most evident in the following industries:
 - Construction (2,065 jobs)
 - Health Care and Social Assistance (1,622 jobs)
 - Retail Trade (1,433 jobs).
- Construction, Manufacturing, and Transport, Postal and Warehousing are industrial industries with a significant jobs deficit. Job deficit in Construction has significantly increased between 2011 and 2016. The deficit in these industries reflects the lack of industrial based employment in Wollondilly LGA, forcing resident workers to travel beyond the LGA for work.
- The total jobs deficit across the Wollondilly LGA recorded 12,094 at the 2016 Census which represents 53% of the total resident worker number. The job deficit has increased from 9,040 in 2011.

Key Note for the subject site

The proposed employment land rezoning will accommodate jobs for Wollondilly LGA resident workers who are currently leaving the LGA for work, making a significant positive contribution to employment retention in the LGA and driving economic value.

Jobs Deficit in Wollondilly LGA



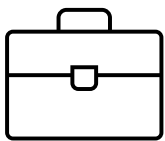
Source: ABS 2016 Census, Urbis

LGA WIDE EMPLOYMENT OVERVIEW

Overview

The analysis in this section shows that at present, there is a significant leakage of jobs outside of the Wollondilly LGA. Of the 22,670 residents employed (as at Census 2016), around 73% (16,500) were required to leave the LGA for work.

The population of the Wollondilly LGA is forecast to experience significant growth over the longer term, fuelled by greenfield development within the Wilton and Appin Growth Areas. Total growth between 2022 and 2060 is estimated to be in the order of 102,500 residents.



CURRENT RESIDENT WORKERS:
22,670

LGA JOB LEAKAGE:
16,500

Applying the current resident worker ratio of 45% to this future population growth results in an estimate of an additional 46,611 resident workers within the LGA over the forecast period. With 73% of the current workforce required to leave the LGA for work at present, there is a clear and evident need for additional jobs within the LGA.

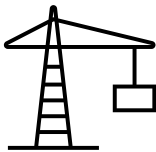
The Appin and Moreton Road employment areas are two clear opportunities to accommodate future employment lands, while employment generated by Appin Local Centre and the network of proposed



FUTURE POPULATION GROWTH:
102,500
BY 2060

EST. RESIDENT WORKER GROWTH:
46,611
BY 2060

neighbourhood centres, will also support localised employment for future residents. In combination, these areas could support up to 12,867 jobs, a proportion of which would be occupied by future residents of the Wollondilly LGA



ADDRESSING FUTURE NEED:	
Employment Area	Est. additional jobs
Appin	880
Moreton Road	10,000
Appin LC (retail*)	1,217
Neighbourhood Centres (retail*)	770
Total	12,867

Source: Walker, Urbis
Note: *Appin LC and Neighbourhood Centres do not include jobs outside of retail.

DEMAND FOR EMPLOYMENT GENERATING USES FROM APPIN AND NORTH APPIN

Overview

Residential development and subsequent population growth within the trade area will necessitate the development of various uses to support and serve this local resident population. Some of the key local population driven employment uses include retail, commercial, education, health care, recreation, while broader strategic employment uses such as industrial uses will also be supported.

The table opposite details the estimated demand for various uses generated by the **primary trade area** (Appin and North Appin) population upon completion. As shown, it is estimated that the development of Appin and North Appin will generate demand for around 9,100 jobs upon completion across the economy. The population thresholds used to determine the population driven uses in this analysis is consistent with the Greater Macarthur Priority Growth Area Economic and Employment Study.

A share of this employment will occur locally, while the remainder of the employment will be accommodated in major employment nodes (e.g. business parks and industrial precincts), strategic centres and other centres beyond the primary trade area.

It is estimated that around 50% (4,550) of job demand could be created locally, i.e. the job would occur within Appin and North Appin.

An indicative distribution of this employment suggests around 2,230 jobs could be supported within the Appin Local Centre, with between 370 and 756 jobs supported across each neighbourhood centre.

Indicative Distribution of Future Population Generated Jobs

	Est. Facilities (No.)	Supportable Floorspace (sq.m)	Est. Supportable Employment (No.)	Est. share created locally in Local or Neighbourhood Centre	Indicative Distribution					
					Town Centre	Neighbourhood Centre				
						1	2	3	4	5
Retail			1,987	100%	1,987	1,217	275	165	110	110
Retail Centres	-	47,900	1,987	100%	1,987	1,217	275	165	110	110
Commercial			1,261	20%	256	128	26	26	26	26
Offices	-	20,497	1,025	25%	256	128	26	26	26	26
Business Park	-	59,042	236	0%	0	0	0	0	0	0
Education			1,976	74%	1,465	449	374	160	160	160
Child Care	9	5,978	84	90%	75	25	10	10	10	10
Primary School	8	41,752	877	100%	877	125	150	150	150	150
Secondary School	3	49,818	648	66%	427	214	214	0	0	0
Special Needs School	1	7,894	95	90%	85	85	0	0	0	0
TAFE	1	6,832	273	0%	0	0	0	0	0	0
Community Services			169	62%	105	61	11	2	16	11
Community Centre(Local)	3	1,366	27	100%	27	14	0	0	14	0
Community Centre (Civic / Regional)	1	1,594	40	0%	0	0	0	0	0	0
Library	2	4,099	49	50%	25	25	0	0	0	0
Youth Centre	3	2,562	36	100%	36	18	9	0	9	0
Place of Worship	9	4,270	17	100%	17	5	2	2	2	2
Health Centres			557	37%	206	107	20	20	20	20
Public Hospital	1	24,357	268	0%	0	0	0	0	0	0
Medical Centre	11	5,694	91	75%	68	20	10	10	10	10
Emergency Services (Ambulance)	1	4,270	26	0%	0	0	0	0	0	0
Emergency Services (Fire)	3	13,664	68	50%	34	34	0	0	0	0
Emergency Services (Police)	1	2,733	104	100%	104	52	10	10	10	10
Aged Care			67	100%	67	22	6	1	22	0
Residential Aged Care	3	1,708	48	100%	48	16	0	0	16	0
Independent Living Units	3	1,708	19	100%	19	6	6	0	6	0
Recreational			304	60%	184	106	16	16	16	16
Indoor Sport & Recreation Centre	1	3,416	51	100%	51	51	0	0	0	0
Aquatic Centre	2	4,270	43	50%	21	21	0	0	0	0
Gym	11	5,694	148	75%	111	33	16	16	16	16
Cinema	2	6,211	62	0%	0	0	0	0	0	0
Industrial			2,809	10%	281	140	28	28	28	28
Industrial and Urban Services	-	702,150	2,809	10%	281	140	28	28	28	28
Total			9,129	50%	4,550	2,230	756	418	398	371

EMPLOYMENT ANALYSIS – SELF CONTAINMENT

Based on existing benchmarks, it is estimated that the on completion population of Appin and North Appin (i.e. the primary trade area) could generate around 32,700 resident workers upon completion.

The distribution of employment, by industry, has been estimated based on the benchmarks for other urban fringe areas such as Richmond/Windsor, Narellan, Camden, and other interstate examples. This distribution is shown in the table below and is broadly consistent with the existing employment profile of the area.

The estimated number of resident workers has then been compared against the estimated number of local jobs that could be supported within Appin and North Appin based on the population thresholds for different uses and a retention rate by use (as shown previously).

This allows for comparison of the number of resident workers and the population generated jobs to assess an indicative future self containment rate within the Town and Neighbourhood Centres.

It is estimated the locally created jobs could account

for up to 14% of the number of resident workers by 2061, though there would be a net outflow of jobs outside the Appin and North Appin area.

Furthermore, it is estimated that over the long term to 2061 the share of workers who work from home could increase to 10% (~3,200 jobs), up from 6% at present.

The neighbourhood centres could benefit from having co-working hubs/space to provide opportunities for the community to either work from home or locally.

Share of resident workers by industry

	Appin (Current)	Urban Fringe* Average
Agriculture, Forestry and Fishing	1%	1%
Mining	1%	0%
Manufacturing	9%	9%
Electricity, Gas, Water and Waste Services	1%	1%
Construction	12%	11%
Wholesale Trade	3%	4%
Retail Trade	12%	12%
Accommodation and Food Services	6%	6%
Transport, Postal and Warehousing	7%	7%
Information Media and Telecommunications	1%	2%
Financial and Insurance Services	4%	4%
Rental, Hiring and Real Estate Services	2%	2%
Professional, Scientific and Technical Services	5%	5%
Administrative and Support Services	3%	3%
Public Administration and Safety	6%	7%
Education and Training	9%	8%
Health Care and Social Assistance	12%	12%
Arts and Recreation Services	1%	1%
Other Services	4%	4%
Total	100%	100%

Source: ABS Census, Urbis

*Includes same areas as self-containment analysis

Local jobs as a share of resident workers

	Est. PTA Resident Workers (2061)	Future Local Jobs*	Local Jobs Share of Resident Workers
Agriculture, Forestry and Fishing	293	0	0%
Mining	136	0	0%
Manufacturing	3,038	123	4%
Electricity, Gas, Water and Waste Services	416	15	4%
Construction	3,731	6	0%
Wholesale Trade	1,302	73	6%
Retail Trade	3,773	1,788	47%
Accommodation and Food Services	1,933	199	10%
Transport, Postal and Warehousing	2,325	63	3%
Information Media and Telecommunications	518	3	0%
Financial and Insurance Services	1,264	16	1%
Rental, Hiring and Real Estate Services	554	22	4%
Professional, Scientific and Technical Services	1,780	137	8%
Administrative and Support Services	1,084	30	3%
Public Administration and Safety	2,209	160	7%
Education and Training	2,666	1,414	53%
Health Care and Social Assistance	3,872	291	8%
Arts and Recreation Services	449	184	41%
Other Services	1,350	26	2%
Total	32,692	4,550	14%

* Jobs within Local Centre and Neighbourhood Centres

05



IMPACTS ON WILTON TOWN CENTRE (REGIONAL CENTRE)

IMPACTS ON VIABILITY AND TIMING OF WILTON TOWN CENTRE (REGIONAL CENTRE)

Overview

Under the current strategic planning context, Wilton Town Centre is currently earmarked to support up to 50,000 sq.m by 2046.

The table opposite (top) outlines the forecast population within the Wilton Town Centre main trade area, having regard to TfNSW population projections and estimated take up rates provided by the Wilton Town Centre landowners group.

Strong forecast population growth over the short to medium term is expected to support a single DDS sub-regional scale town centre in the first stage (approximately 2029), supported by greenfield population growth and the established residential population within the Picton and Tahmoor region.

A double DDS sub-regional scale town centre is estimated to be supportable by 2034, with a main trade area population of over 100,000 residents.

The table opposite (bottom) shows how the population required to support large scale retail facilities at Wilton Town Centre is well established prior to Appin, with Appin only reaching over 58,000 residents within its main trade area by 2039 (Wilton is forecast to achieve this by around 2026).

The development of retail facilities at Appin Local Centre and surrounds will be supported by the immediate resident catchment, and will not impede on the scale, mix, role or function of the Wilton Town Centre.

Wilton Town Centre (Regional Centre) – Trade Area and Floorspace Demand Timing

	2024	2029	2034	2039	2044	2049
Wilton Town Centre Primary Trade Area Population	11,875	23,740	30,320	35,636	40,109	44,583
Wilton Town Main Trade Area Population	44,500	72,600	100,500	126,700	145,300	152,200
Town Centre Floorspace (sq.m)						
DDS	0	7,000	14,000	14,000	14,000	14,000
Supermarket	0	4,000	8,000	8,000	9,500	9,500
Mini-majors & Retail Specialties	0	5,770	14,840	14,840	15,850	15,850
Non-Retail and Ancillary	0	3,430	9,970	9,970	10,650	10,650
Total	0	20,200	46,810	46,810	50,000	50,000

Wilton Town Centre (Regional Centre) – Trade Area and Floorspace Demand Timing

Wilton Regional Centre:	2024	2029	2034	2039	2044	2049
Wilton Town Centre Main Trade Area Population	44,500	72,600	100,500	126,700	145,300	152,200
Indicative Town Centre Floorspace	0	20,200	46,810	46,810	50,000	50,000
Appin:						
Appin Local Centre Main Trade Area Population	6,136	20,451	39,834	58,783	75,664	83,120
Indicative Appin Floorspace Staging	0	0	14,189	17,939	40,311	42,811

