

BELMORE ROAD PRECINCT RETAIL DEMAND ANALYSIS / WENTWORTH ROAD PRECINCT ROLE AND FUNCTION ANALYSIS

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EXECUTIVE SUMMARY – RETAIL DEMAND ANALYSIS

Key Findings

- CKDI Bringelly Pty Ltd (CKDI) is a major landholder in Sydney's South West Growth Area (SWGA). CKDI's landholding forms part of the broader 187-hectare Belmore Road Precinct (subject site).
- Given fragmented land ownership within the Precinct, CKDI is leading the development of a precinct-wide master plan to enable the structured delivery of new housing and non-residential uses.
- To ensure the master plan allows for sufficient retail and services to meet the needs of the future resident, worker and visitor population, Urbis have been engaged to assess the future demand for retail floorspace at the subject site.
- Drawing on the subject site's supportable quantum of retail floorspace and Urbis' extensive database of successful shopping centres, we have outlined an indicative centre composition in Table E.1.
- As shown in the table, we recommend the subject site accommodate a single-supermarket shopping centre with a total GLA of ~5,900 sq.m (or ~7,000 sq.m GFA). This centre would be anchored by a ~4,000 sq.m full-line supermarket, supported by 400 sq.m of mini-major floorspace (potentially a large fresh food grocer or liquor store) and 1,500 sq.m of retail specialty floorspace (refer Table E.2 for recommended mix).
- In addition to the 5,900 sq.m of retail floorspace, we recommend a further 1,600 sq.m of non-retail floorspace be provided in the centre.
- Notably, the proposed single-supermarket shopping centre at the subject site does not account for the total ~6,600 sq.m of retail floorspace (or ~7,760 sq.m of GFA) estimated to be supportable at the subject site at build-out. This ~700 sq.m (~820 sq.m of GFA) of additional supportable floorspace can therefore be provided in a very small centre elsewhere in the precinct.

Indicative Centre Composition

Table E.1

	GLA (SQ.M)	% OF TOTAL GLA	GFA (SQ.M)*	INDICATIVE NO. OF TENANTS
Supermarket	4,000	53%	4,700	1
Mini-Major	400	5%	470	1 (e.g. grocer, liquor)
Retail Specialties	1,500	20%	1,770	See Table E.2
Total Retail	5,900	78%	6,940	
Non Retail	1,600	22%	1,880	7-8 (e.g. gyms, medical centre / suites, and local financial services)
Total Centre	7,500	100%	8,820	

*Based on benchmark conversion rate for GFA to GLA of 85%
Source: Urbis Shopping Centre Benchmarks 2021

Indicative Specialty Mix

Table E.2

	GLA (SQ.M)	% OF SPECIALTY GLA	INDICATIVE NO. OF TENANTS
Food Retail	200	13%	1-2 (e.g. bakery, butcher)
Food Catering	400	27%	4-6 (e.g. take-away, casual dining)
Apparel	200	13%	2
Homewares	150	10%	2
Leisure/General	200	13%	2 (e.g. newsagents, florist, giftshop)
Retail Services	350	23%	4-6 (e.g. dry cleaners, hairdresser, massage, key-cutter, optometrist)
Total Specialties	1,500	100%	15-20

Source: Urbis Shopping Centre Benchmarks 2021

EXECUTIVE SUMMARY – WENTWORTH ROAD PRECINCT ANALYSIS

Key Findings

- As part of the development of the master plan for the Belmore Road Precinct, Camden Council have requested that the master plan be extended to include a 6.4-hectare parcel of land to the northeast, bounded by Wentworth Road, The Northern Road and Bringelly Road (the Wentworth Road Precinct).
- Therefore, there is a need to undertake analysis to determine the appropriate role and function of the Wentworth Road Precinct and the nature of land uses that should be accommodated in the precinct and facilitated by the master plan.
- As such, in addition to the retail demand analysis, Urbis have also undertaken a success factor and synergies analysis of the Wentworth Road Precinct to determine the appropriate role and function of the precinct and the nature of land uses that would be best suited for inclusion within.
- Based on analysis of Land Use Success Factors, we found that the Wentworth Road Precinct is **highly suited to employment-generating land uses** and **moderately suitable for residential land uses**.
- Furthermore, our analysis of Strategic Context and synergies with surrounding precincts indicated that the **employment-generating land uses have more synergies** with the existing and planned surrounding precincts and land uses than residential land uses.
- Other key findings of our analyses are summarised below:



Employment-Generating Uses

- ✓ Employment-generating uses at the Wentworth Road Precinct would benefit from proximity and high visibility to passing traffic along The Northern Road. The precedent projects highlight examples of sites that leverage off their high visibility to major roads.
- ✓ The Camden LGA is facing a critical shortage of employment lands, resulting in rental escalation and rising capital values on existing lands. The precinct is in a prime location at the southern gateway to the WSAA to attract prospective tenants, help ease supply pressures and provide a supporting role to surrounding future employment precincts.
- ✓ Businesses at the precinct could leverage off its proximity to the airfreight terminal and Bradfield, and access to The Northern Road, helping to increase supply chain efficiencies particularly for time-sensitive, aviation-based industries, such as agriculture or logistics.



Residential Uses

- ✓ Residential uses at the Wentworth Road Precinct would benefit from its proximity to major employment hubs, amenities and services in the nearby precincts and centres.
- ✗ However, the precinct's proximity and views to The Northern Road could result in significant and continuous noise and odour disturbances for prospective residents.
- ✗ There is also significant competing supply of residential land uses in better locations which benefit from more attractive outlooks and better transport accessibility and access to amenities and services.
- ✓ Nevertheless, there is an opportunity for part of the precinct to contribute to housing diversity by accommodating a mix of low density and large lot residential uses.

Based on these findings, we recommend the northern portion of the Wentworth Road Precinct (where it interfaces with the existing non-residential uses) be focused on supporting employment-generating land uses (e.g. industrial, bulky goods retail, large format retail, service station), while the southern portion of the precinct provide for a mix of low density and large lot residential uses.

INTRODUCTION

CKDI Bringelly Pty Ltd (CKDI) is a major landholder in Sydney's South West Growth Area (SWGA). CKDI's landholding forms part of the broader 187-hectare Belmore Road Precinct (subject site), which is, in turn, located within the South Creek West Land Release Area (SCWLRA).

As one of 14 precincts in the broader SWGA, the SCWLRA has been earmarked for the delivery of jobs and housing over the next 30+ years.

Given fragmented land ownership within the Precinct, CKDI is leading the development of a precinct-wide master plan to enable the structured delivery of new housing and non-residential uses.

Camden Council have also requested that the Belmore Road Precinct master plan be extended to include a 6.4-hectare parcel of land to the northeast, bounded by Wentworth Road, The Northern Road and Bringelly Road (the Wentworth Road Precinct).

To ensure the master plan allows for sufficient retail and services to meet the needs of the future resident, worker and visitor population, Urbis have been engaged to assess the future demand for retail floorspace at the subject site.

Urbis have also undertaken a success factor and synergies analysis of the Wentworth Road Precinct to determine the appropriate role and function of the precinct and the nature of land uses that would be best suited for inclusion within.

Our report is structured as follows:

- **Part A: Retail Demand Analysis**
 - Section A.1 – Site Overview and Strategic Context
 - Section A.2 – Retail Hierarchy and Supply Analysis
 - Section A.3 – Retail Trade Area
 - Section A.4 – Demand Analysis and Recommendations
- **Part B: Wentworth Road Precinct Role and Function Analysis**
 - Section B.1 – Site Assessment
 - Section B.2 – Land Use Success Factor Analysis
 - Section B.3 – Strategic Context and Synergies Analysis
 - Section B.4 – Precedent Projects
 - Section B.5 – Recommendations.

Key changes proposed to address comments from Council and public submissions include:

- Updates to the road network including:
 - Introduction of additional green streets into the ILP
 - Replacement of the landscape buffer along The Northern Road with a new street typology
 - Additional north-south lots across the Precinct
 - Removal of collector road between the two southern playing fields
 - Introduction of laneways west of the northern playing fields
 - Removal of sub-arterial road to reflect Lowes Creek Maryland gazetted proposal
- Updates to the Wentworth Road Investigation Area including:
 - Introduction of employment uses surrounding the local heritage item
 - Introduction of Low Density Band 1 residential
 - Introduction of an 8,000 sq.m local park
- Updates to open space including:
 - Introduction of a new open space category – tree retention (where tree retention is prioritised)
 - Introduction of a local park on the RMS landholdings north of Belmore Road
 - Relocate and increase the size of Local Park 7 from 4,000 sq.m to 5,000 sq.m
 - Increase the size of Local Park 8 from 6,000 sq.m to 7,000 sq.m
 - Introduction of a linear park in the south-west portion of the site, connecting the ridgeline to the riparian corridor
- Changes to residential areas including:
 - Removal of any residential land from the PMF flood level
 - Introduction of additional medium density on the RMS landholdings south of Belmore Road
 - Replacement of Low Density Band 2 with Medium Density Band 1 north of the northern playing fields
 - Introduction of Environmental Living lots on the south-west ridgeline
- Relocation of the future educational establishment onto the proponent's landholdings
- Introduction of a small retail centre within the south-west portion of the site.

PART A: RETAIL DEMAND ANALYSIS

RETAIL DEMAND ANALYSIS METHODOLOGY

A part of the development of any precinct-scale master plan, there is a need to analyse and assess the current and future market demand and need for both residential and non-residential uses.

This analysis is critical to ensuring that the ultimate master plan for the precinct is evidence-based and tailored to meet the specific needs of the local resident, worker and visitor communities.

This retail demand analysis for the Belmore Road Precinct has therefore been undertaken to explore the likely future retail and services requirements of the future resident, worker and visitor population at the subject site, and ensure the master plan allows for sufficient floorspace to meet these needs.

Urbis' assessment of the future demand for retail floorspace at the subject site has involved the following tasks:

- **Site Overview and Strategic Context Analysis** – Analysed and assessed the characteristics of the subject site and surrounding area, including size and location of the site, existing and planned surrounding land uses, and planned precincts and infrastructure
- **Retail Hierarchy and Supply Analysis** – Identified the existing and planned retail centres in the surrounding area
- **Retail Trade Area Definition** – Defined a retail trade area to assess the market demand for retail uses at the subject site at build-out, based on the geographical and strategic planning context of the site
- **Retail Spending Market Forecast** – Based on the forecast population of the trade area at build-out (i.e. the ultimate population of the trade area upon completion), we forecast the size of the future retail spending market of the trade area
- **Demand Analysis** – Assessed the total quantum of retail floorspace that is likely to be required at the subject site based on the site's competitive positioning and likely achievable market share
- **Recommendations** – Drawing on the subject site's supportable quantum of retail floorspace and Urbis' extensive database of successful shopping centres, we outlined an indicative centre composition and estimated the number of jobs likely to be supported by the proposed retail centre at the subject site upon completion.

A.1 SITE OVERVIEW AND STRATEGIC CONTEXT



SUBJECT SITE OVERVIEW

Key Findings

The subject site comprises a 187-hectare area known as the Belmore Road Precinct, situated in the South West Growth Area (SWGGA).

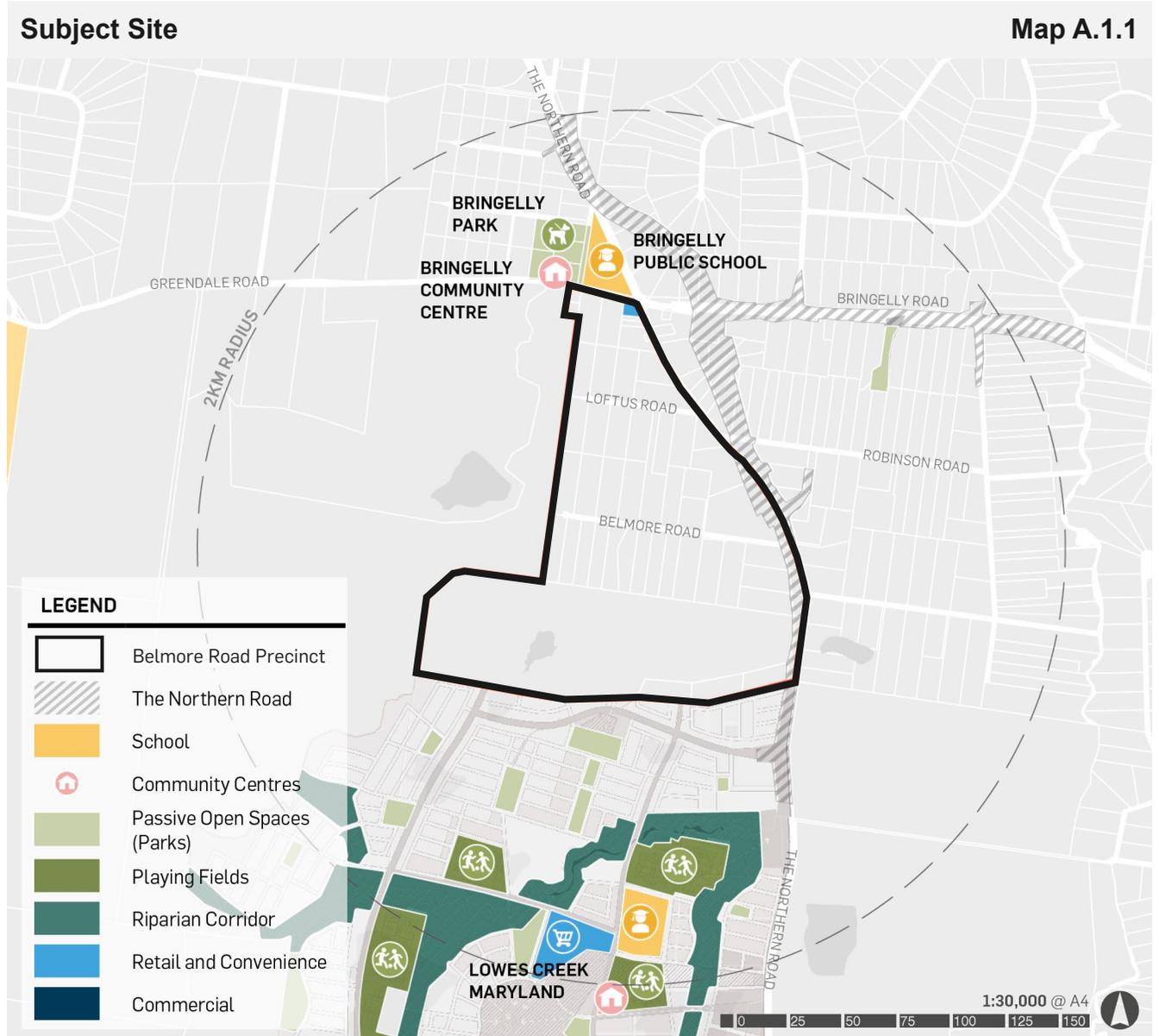
The site is currently zoned RU1 Primary Production, RU4 Primary Production Small Lots and B1 Neighbourhood Centre under the *Camden Local Environment Plan 2010*. It accommodates a mix of low intensity agricultural, rural residential and retail uses.

Given fragmented land ownership within the Precinct, CKDI is leading the development of a precinct-wide master plan to enable the structured delivery of new housing and non-residential uses.

The site benefits from frontage to The Northern Road to the east and Greendale Road to the north, which will provide easy access to the future Western Sydney Airport and Aerotropolis, Leppington, and South-West Sydney.

Surrounding land uses include the planned Aerotropolis to the north, and the PGH Bricks brickworks which is situated immediately west of the subject site and expected to continue operations for at least the next 10 years.

The planned Lowes Creek Maryland Precinct is also located immediately south of the Belmore Road Precinct but is not yet under construction. Low intensity agricultural and rural residential uses are currently situated east of the subject site but, given their location within the South Creek West Land Release Area (SCWLRA), are anticipated to transition to residential uses over time.



STRATEGIC CONTEXT

Key Findings

The subject site is located within the South Creek West Land Release Area (SCWLRA). As one of 14 precincts in the broader SWGA (refer Figure A.1.2), the SCWLRA has been earmarked for the delivery of jobs and housing over the next 30+ years.

The SCWLRA extends south from Greendale Road, encompassing much of Bringelly and parts of Cobbitty. However, the area is divided by the Lowes Creek Maryland Precinct which has been planned through collaboration between private landholders, the NSW Department of Planning and Environment (DPE) and Camden Council.

The Lowes Creek Maryland Precinct Plan was approved in July 2021 and plans for the delivery of a Local Centre, school, 7,000 dwellings and significant open space to service an ultimate population of 22,400 residents.

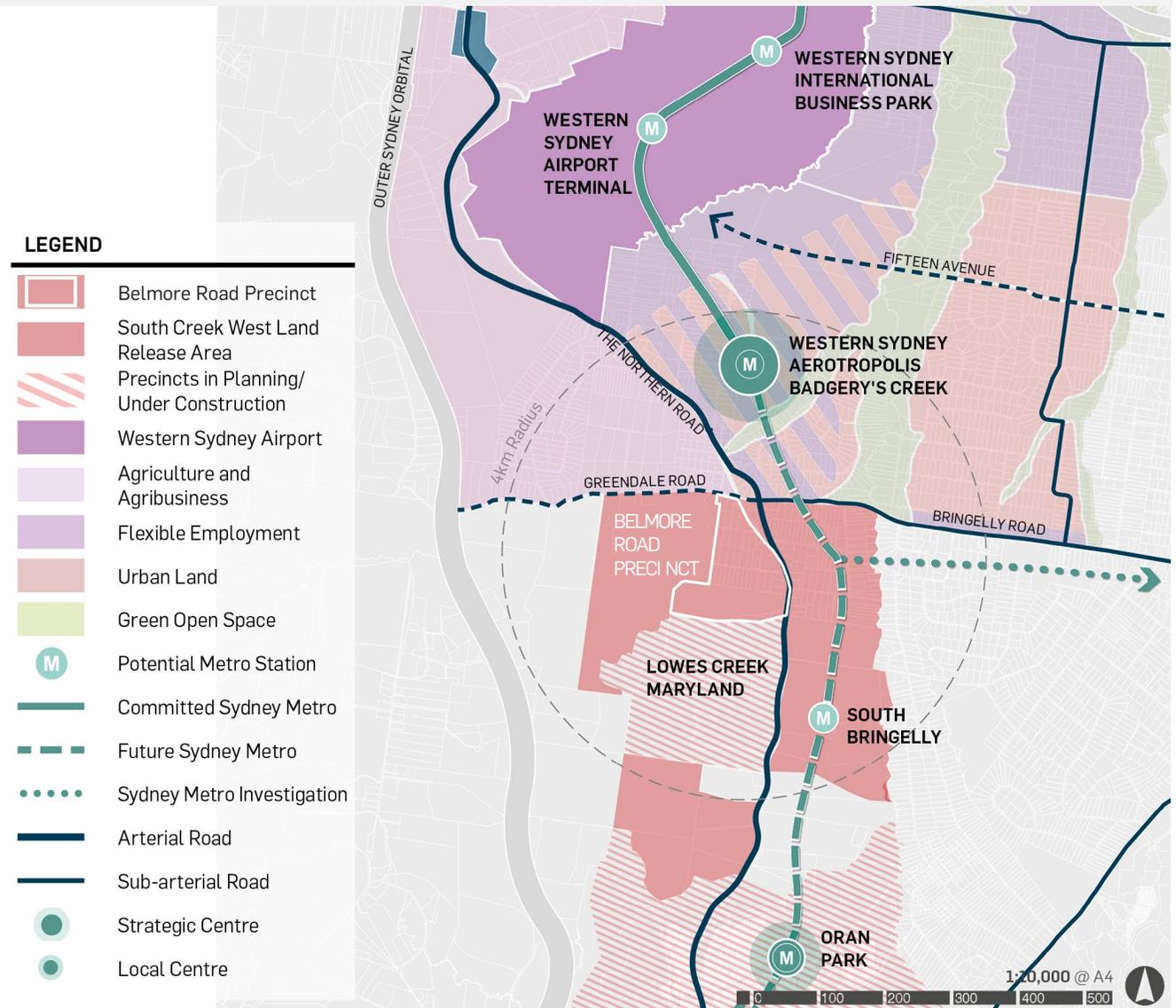
The Western Sydney Airport and Aerotropolis is also currently under construction immediately north of the SCWLRA. The opening of the Airport in 2026 is expected to be a major catalyst for growth in the area.

To ensure the full potential of the Airport is leveraged, a new Strategic Centre "The Aerotropolis Core / Bradfield" accommodating a broad mix of land uses is planned to be situated between the Airport and SCWLRA.

This Strategic Centre, the Airport and the wider Aerotropolis will be serviced by a new Metro line which is also planned to extend south to Oran Park and Macarthur, and east to Leppington.

Strategic Context

Map A.1.2



STRATEGIC CONTEXT – SOUTH WEST GROWTH AREA STRUCTURE PLAN

Key Findings

In December 2022, DPE released an updated Structure Plan for the SWGA (2022 SWGA Structure Plan). This updated Structure Plan replaced the outdated 2010 SWGA Structure Plan.

As shown in Figure A.1.1, the 2022 SWGA Structure Plan clarified the locations of planned and potential strategic centres, local centres and neighbourhood centres. Further discussion of the planned retail hierarchy and network is provided in Section A.2.

Among other changes, the 2022 SWGA Structure Plan identifies a local centre at Lowes Creek Maryland which was not identified in the 2010 SWGA Structure Plan.

Additionally, the updated plan identifies a neighbourhood centre at the subject site. However, the location of this centre on the plan at the intersection of the Northern Road and Bringelly Road does not reflect the current plans being developed for the subject site. While the existing 1,000 sq.m Bringelly Village is situated within that northeast corner of the subject site, the size, scale and location of Bringelly Village is not fit-for-purpose to meet the needs of the new incoming community. Furthermore, the centre cannot be expanded without a full demolition of the existing buildings.

Therefore, it is necessary to develop a more suitable purpose-built centre at the subject site to service the needs of the incoming residential population. While potential employment land is identified within the Precinct along The Northern Road, this relies on the intersection from The Northern Road. In reality, this intersection is within the Lowes Creek Maryland Precinct aligning with the rezoned employment land identified on the 2022 SWGA Structure Plan.

A new neighbourhood centre is instead located off the new intersection with The Northern Road. This, concurrently with the smaller centre to the south-west and new employment uses to the north adjacent to Bringelly Village is considered a more appropriate outcome which aligns with the overarching vision of the 2022 SWGA Structure Plan.

2022 South West Growth Area Structure Plan

Figure A.1.1

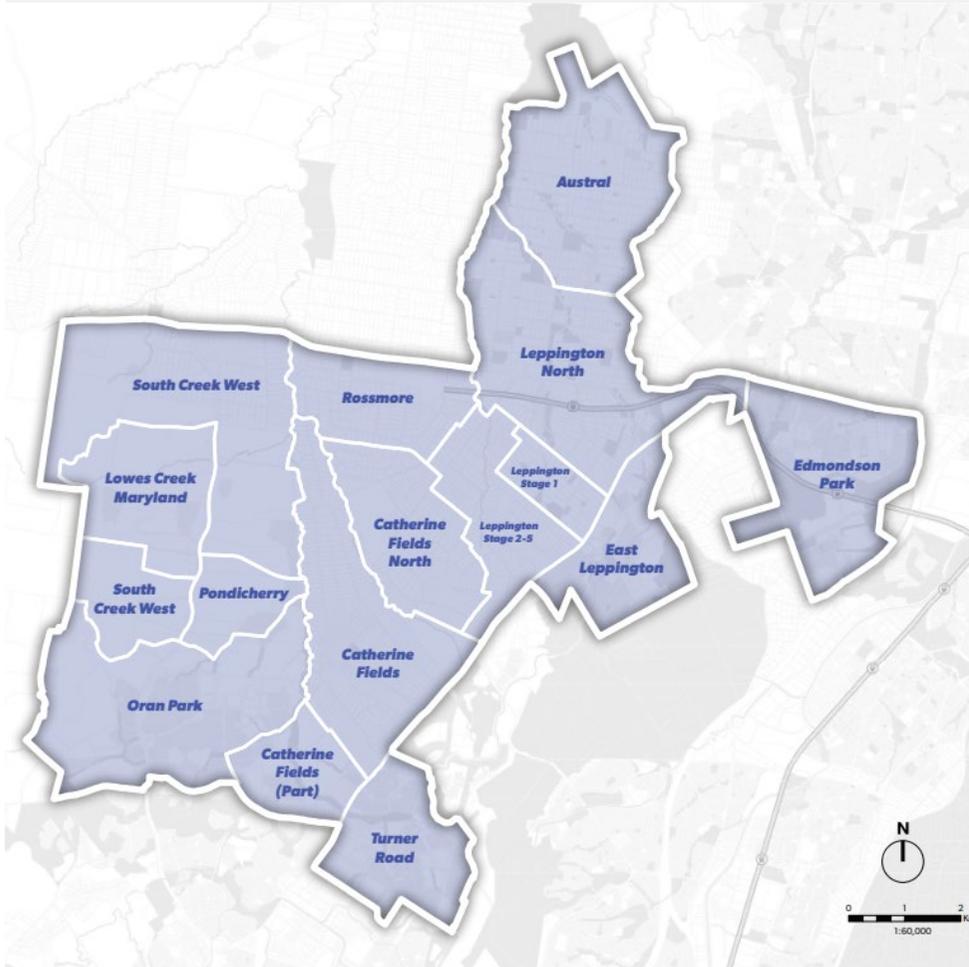


Source: NSW DPE

STRATEGIC CONTEXT – PLANNED PRECINCTS

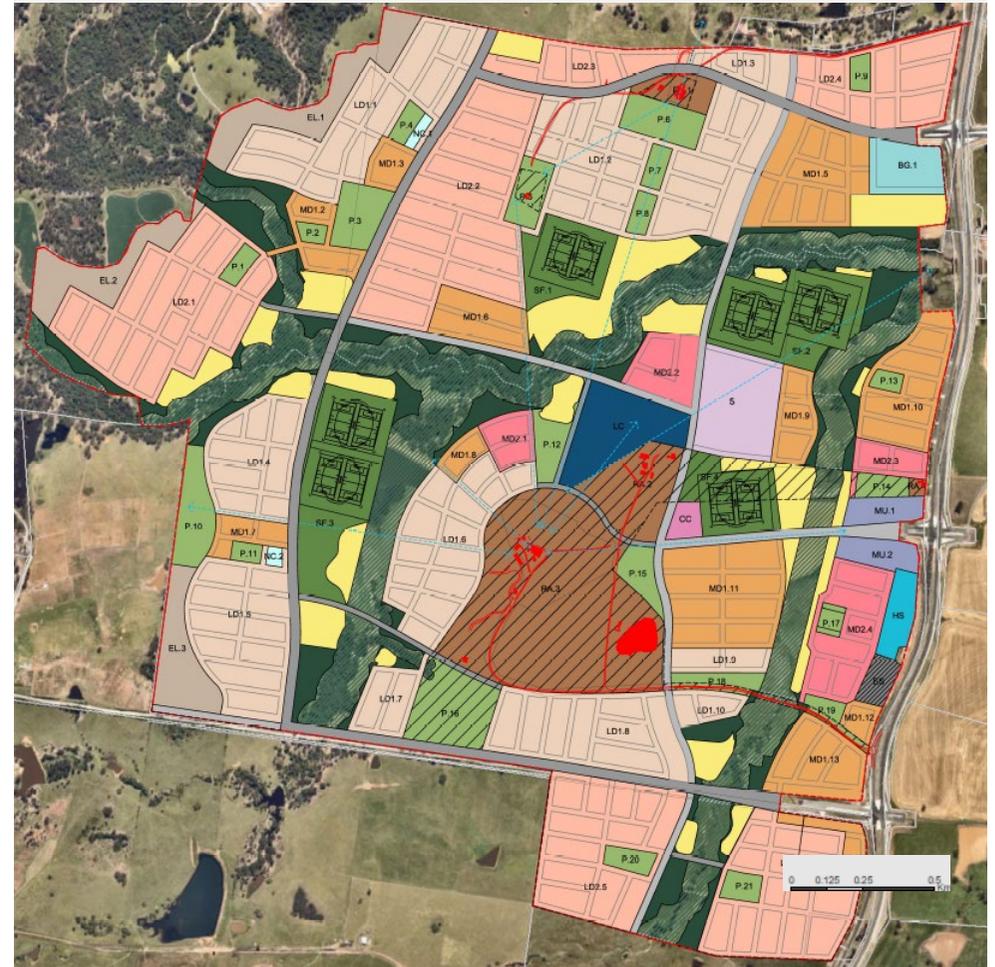
South West Growth Area

Figure A.1.2



Source: NSW DPE

Lowes Creek Maryland Indicative Land Use Plan Figure A.1.3



Source: NSW DPE

A.2 RETAIL HIERARCHY AND SUPPLY ANALYSIS



EXISTING CENTRES NETWORK AND HIERARCHY

Key Findings

The existing retail network and hierarchy in the surrounding area is a key consideration in defining an appropriate trade area and assessing the demand and need for retail floorspace at the subject site.

As shown in Figure A.2.1, there are four types of centre within the Greater Sydney Strategic Planning framework that are relevant to South-West Sydney:

- **Metropolitan Clusters**
- **Strategic Centres**
- **Local Centres**
- **Neighbourhood Centres.**

These different centre categories vary in their intended scale and mix of land uses.

There are currently three existing centres within a 10 km radius of the subject site which already provide a substantial quantum of retail floorspace – Narellan, Carnes Hill and Oran Park.

As shown in Table A.2.1, Narellan is currently the largest of these existing centres with over 70,000 sq.m of retail GLA.

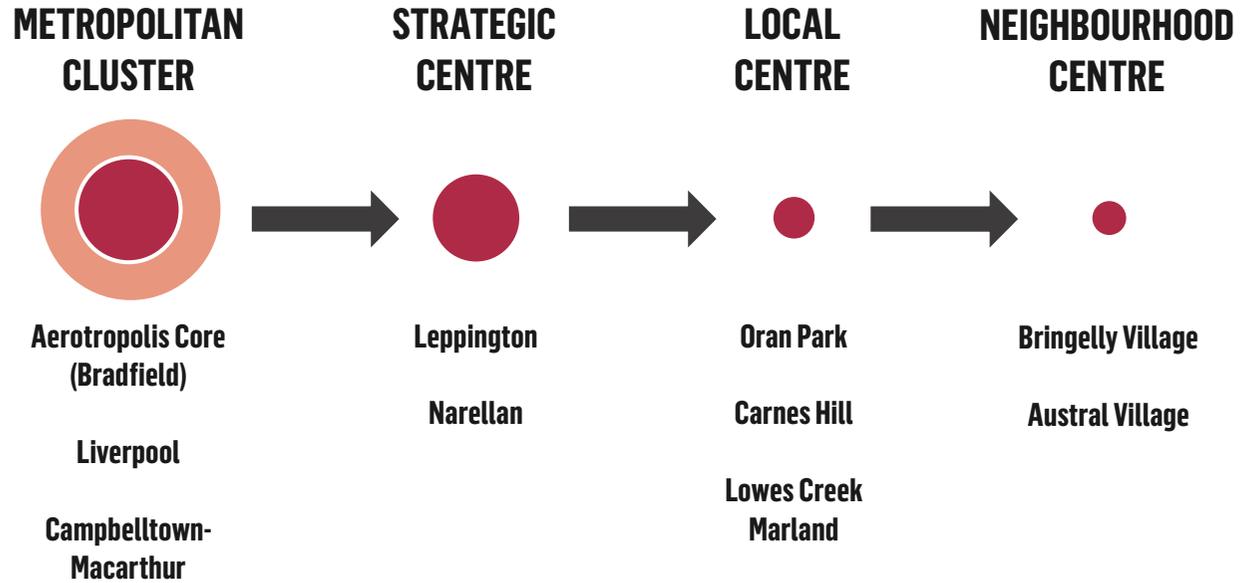
However, the closest existing centre to the subject site is Oran Park which currently provides 9,800 sq.m of retail GLA anchored by a Woolworths supermarket. A major expansion has been proposed for this centre which is detailed overleaf.

Bringelly Village is a ~1,000 sq.m neighbourhood centre situated within the northeast corner of the subject site. The Village features a post office, liquor store, a small grocer and retail services. While providing some retail to existing residents, the size, scale and location of Bringelly Village is not fit-for-purpose to meet the needs of the new incoming community. Furthermore, the centre cannot be expanded without a full demolition of the existing buildings.

Therefore, it is necessary to develop a more suitable purpose-built centre at the subject site to service the needs of the new residential population.

Centre Hierarchy

Figure A.2.1



Source: NSW DPE; Greater Sydney Commission

Existing Centres

Table A.2.1

NAME	CENTRE TYPE	RETAIL GLA (SQ.M)	DISTANCE FROM SUBJECT SITE (KM)	MAJOR TENANTS
Narellan	Strategic Centre	70,000	10 km	3 x DDS 2 x Supermarkets
Carnes Hill	Local Centre	16,350	10 km	Big W Woolworths
Oran Park	Local Centre	9,800	5 km	Woolworths
Bringelly Village	Neighbourhood Centre	~1,000	0 km	-

Source: Urbis, PCA Shopping Centres Online

PLANNED AND PROPOSED RETAIL SUPPLY

Key Findings

In addition to the existing retail network and hierarchy, the planned centres network and firm supply pipeline are also key considerations in defining an appropriate trade area and assessing the demand and need for retail floorspace at the subject site.

As shown in Table A.2.2, twelve future centres have been identified by DPE close to the subject site, as per the updated SWGA Structure Plan (December 2022). These centres vary in scale but are all within the early planning stage or have been identified as a potential future centre.

The Leppington Strategic Centre, Austral Local Centre and Lowes Creek Maryland Precinct Local Centre have been flagged as the largest of the planned centres, with potential for 100,000 sq.m, 25,000 sq.m and 20,000 sq.m of retail floorspace, respectively.

However, it is likely that the Aerotropolis Core (i.e. Bradfield) may deliver a greater quantum of floorspace than centres close to the subject site.

A further two potential local centres along Bringelly Road have been identified in the 2022 SWGA Structure Plan, although the potential quantum of retail floorspace for these centres is still unknown.

While most centres in the surrounding area are still in early planning, there are several firm retail developments in the pipeline (refer Table A.2.3) which are expected to be completed by 2025.

Two of these developments have received Development Approval and are anticipated to deliver an additional 19,050 sq.m of retail floorspace to the local area by 2024/25.

A further two developments are still in the Development Application stage but, if approved, will deliver a further ~9,800 sq.m of retail floorspace by 2024/25.

Planned Centres (December 2022)

Table A.2.2

NAME	SUBURB	RETAIL GLA (SQ.M)	STAGE
Leppington Strategic Centre	Leppington	100,000	Early Planning
Austral Local Centre	Austral	25,000	Early Planning
Austral Village Neighbourhood Centre	Austral	8,000	Early Planning
Eighth Avenue Neighbourhood Centre	Austral	8,000	Early Planning
Gurner Avenue Neighbourhood Centre	Austral	8,000	Early Planning
Lowes Creek Maryland Precinct Local Centre	Bringelly	20,000	Early Planning
Aerotropolis Core (Bradfield)	Bringelly	<i>Not yet known</i>	Early Planning
South Creek West Neighbourhood Centre (subject site)	Bringelly	<i>To be confirmed</i>	Early Planning
Lowes Creek North Neighbourhood Centre	Bringelly	<i>Not yet known</i>	Early Planning
Lowes Creek South Neighbourhood Centre	Bringelly	<i>Not yet known</i>	Early Planning
Cobbitty Neighbourhood Centre	Cobbitty	<i>Not yet known</i>	Early Planning
Jersey Road Local Centre	Bringelly	<i>Not yet known</i>	Potential
Allenby Road Local Centre	Rossmore	<i>Not yet known</i>	Potential

Source: NSW DPE, Deep End Services

Firm Retail Supply Pipeline

Table A.2.3

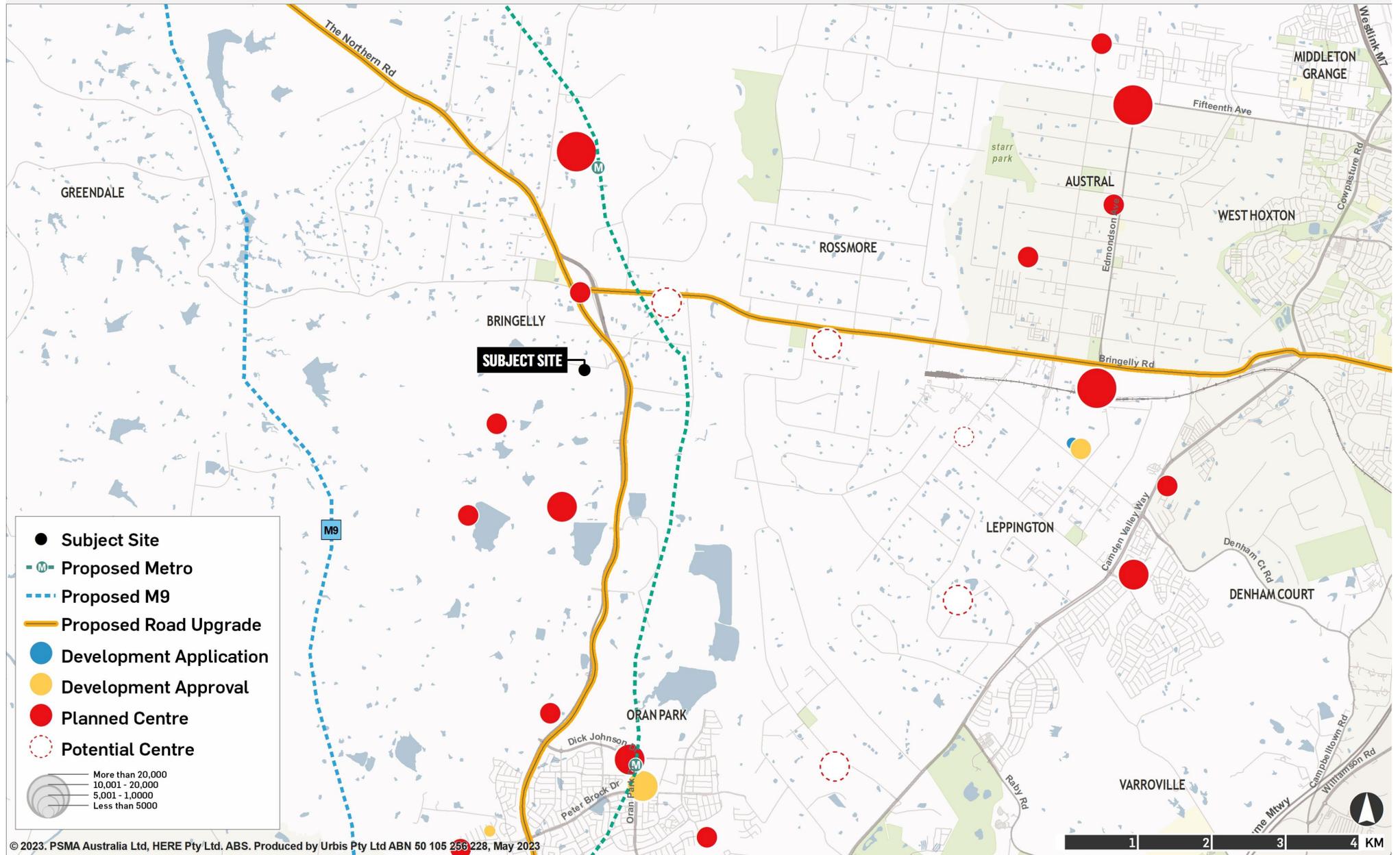
NAME	SUBURB	RETAIL GLA (SQ.M)	STAGE	COMPLETION YEAR
Oran Park Podium – Stage 2	Oran Park	16,050	Development Approval	2024
Oxley Ridge	Cobbitty	3,000	Development Approval	2025
Ingleburn Road Commercial Development	Leppington	5,672	Development Application	2024
Ingleburn Road Supermarket	Leppington	4,100	Development Application	2025

Source: Cordell Connect, NSW DPE, Deep End Services

PLANNED AND PROPOSED RETAIL SUPPLY

Planned and Proposed Retail Centres

Map A.2.1



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A.3 RETAIL TRADE AREA



RETAIL TRADE AREA DEFINITION

Key Findings

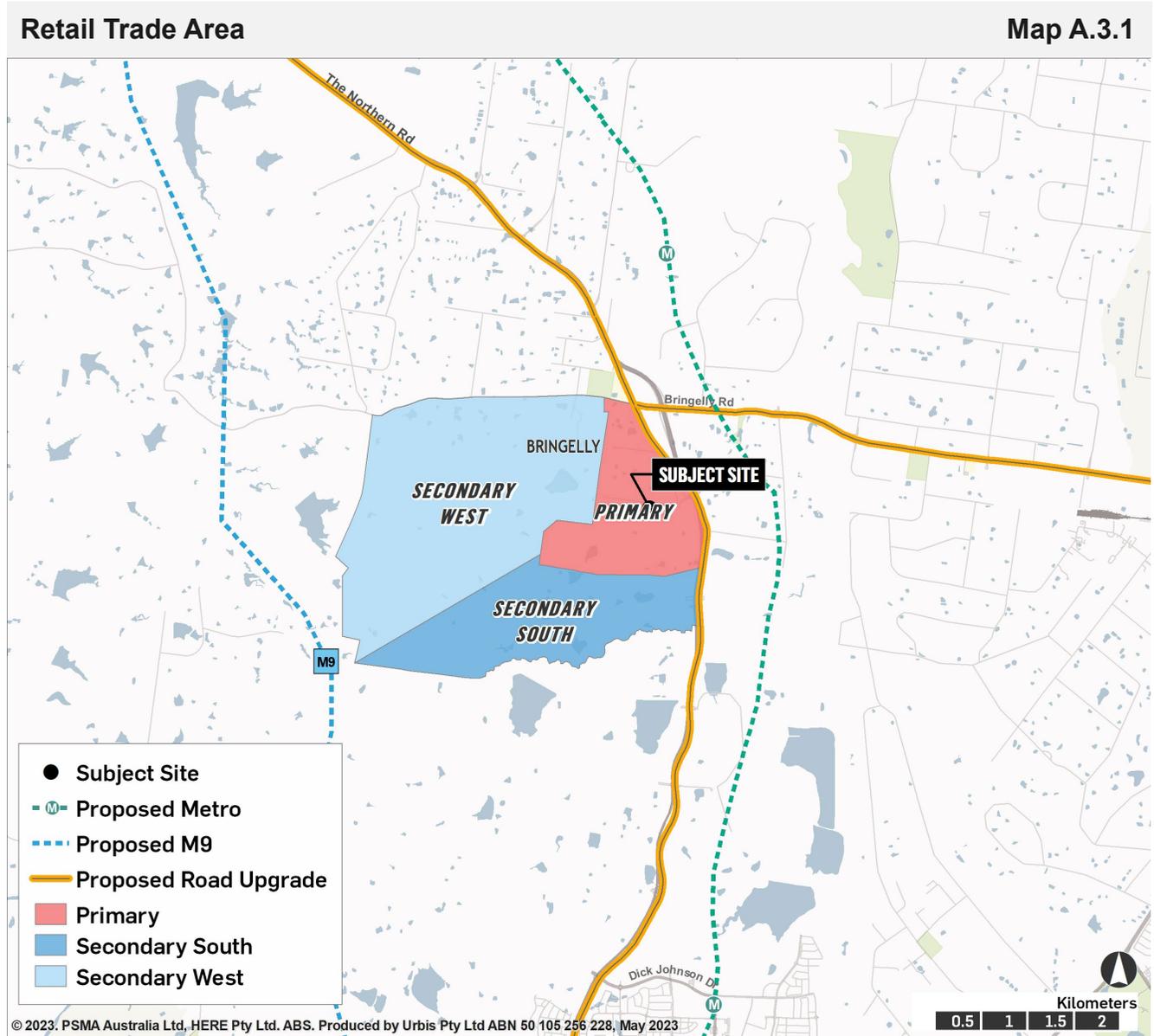
We defined a retail trade area to assess the market demand for retail uses at the subject site at build-out.

The trade area refers to the area from which a centre or retailer is most likely to draw custom. The size and scale of trade areas in greenfield locations vary due to geographical and strategic planning context (refer Section A.1 and A.2).

The adopted trade area has been based on the extent of the Belmore Road Precinct and Transport for NSW Travel Zone boundaries. It is defined as:

- **Primary trade area** – comprises the entire Belmore Road Precinct
- **Secondary south trade area** – extends south from the primary trade area to Lowes Creek, partially overlapping the Lowes Creek Maryland Precinct, and east to The Northern Road.
- **Secondary west trade area** – extends west from the primary trade area Bringelly Creek, north to Greendale Road, and south to the secondary south trade area.

Given the planned centre at Bradfield to the north, the planned Local Centre at Lowes Creek Maryland to the south, and potential Local Centre to be located to the east (directly south of Bringelly Road and east of the Metro Line), the trade area defined for the subject site reflects a relatively local catchment.



PROJECTED POPULATION AND RETAIL SPENDING MARKET

Key Findings

For the purposes of our assessment, we have forecast the population of the trade area at build-out (i.e. the ultimate population of the trade area upon completion).

In preparing these projections, we have had regard to:

- Proposed dwelling yield for the Belmore Road Precinct
- Projected resident population of the proposed Lowes Creek Maryland Precinct
- Travel Zone-level population projections published by Transport for NSW in June 2019.

The total trade area is projected to accommodate a resident population of ~21,225 persons at build-out. Up to approximately 10,700 of these residents are expected to be accommodated in the primary trade area alone.

The secondary trade area is expected to reach a population of almost 10,530 persons, largely driven by the planned growth in the Lowes Creek Maryland Precinct.

We projected the total retail spending market at build out by multiplying an assumed spend per capita for each product group by the projected population. For the purposes of our analysis, spend per capita data for the nearby Oran Park Precinct has been used as a proxy for trade area residents.

Total retail spend across the trade area is projected to reach ~\$385 million (\$2021) at build-out. The primary trade area is expected to account for half of the total spending market at \$194.1 million.

Population and Retail Spend Per Capita, Build-Out (2056+)

Table A.3.1

TRADE AREA SECTOR	POPULATION	TOTAL RETAIL SPEND PER CAPITA*
Primary	10,698**	
Secondary South	6,125	
Secondary West	4,402	
Total Secondary	10,527	
Total Trade Area	21,225	\$17,604

* 2021 dollars

** Maximum potential population

Source: ABS, MarketInfo, Urbis, Transport for NSW, Deep End Services, AEC

Retail Spending Market* (\$M), Build-Out (2056+)

Table A.3.2

PRODUCT GROUP	PRIMARY	TOTAL SECONDARY	TOTAL TRADE AREA
Food Retail	\$78.8	\$77.6	\$156.4
Food Catering	\$27.1	\$26.7	\$53.8
Apparel	\$19.3	\$19.0	\$38.3
Homewares	\$16.1	\$15.8	\$31.9
Bulky Goods	\$22.5	\$22.2	\$44.7
Leisure/General	\$23.5	\$23.1	\$46.5
Retail Services	\$6.7	\$6.6	\$13.3
Total Retail	\$194.1	\$191.0	\$385.0

*2021 dollars

Source: MarketInfo, Transport for NSW, Deep End Services, AEC, Urbis

A.4 DEMAND ANALYSIS AND RECOMMENDATIONS



DEMAND ANALYSIS METHODOLOGY

Key Points

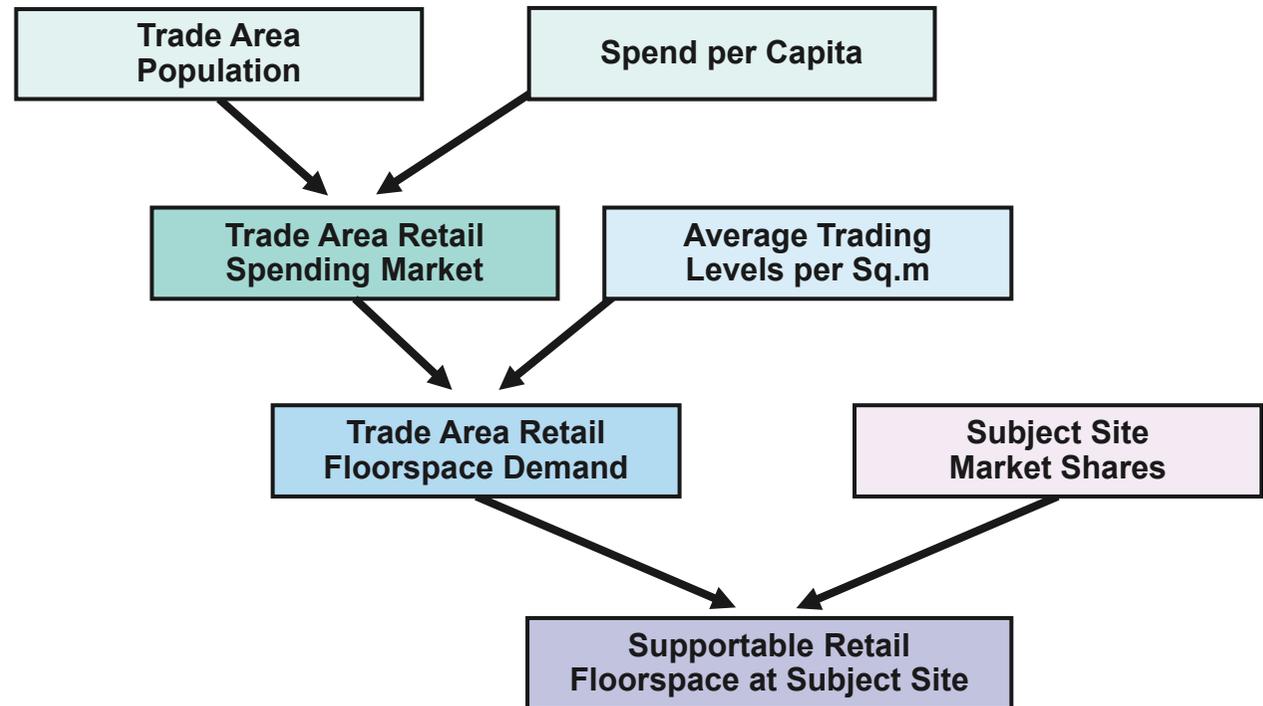
For the purposes of this demand assessment, we utilised a retail spending approach to project future retail floorspace needs in the trade area.

As illustrated in Figure A.4.1, this approach comprises:

1. Projecting the **resident population** of the trade area at build-out
2. Multiplying an assumed **spend per capita** for each product group by the projected population to quantify the total **trade area retail spending market**
3. Dividing the total **trade area retail spending market** by **average trading levels per sq.m** for each product group (sourced from the Urbis Shopping Centre Benchmarks 2019) to estimate total **trade area retail floorspace demand** at build-out
4. Applying appropriate **market shares** for each trade area sector to the total **trade area retail floorspace demand** to estimate **supportable retail floorspace at the subject site** by product group.

Methodology Overview

Figure A.4.1



RETAIL FLOORSPACE DEMAND ANALYSIS

Key Findings

Table A.4.1, overleaf, outlines the key assumptions that have been used as part of the retail floorspace demand analysis for the subject site, and the results of our demand assessment.

As noted previously, to estimate total trade area retail floorspace demand at build-out, we divided the total trade area retail spending market by average trading levels per sq.m for each product group.

These average trading levels per sq.m have been sourced from the Urbis Shopping Centre Benchmarks 2021. These Benchmarks are based on an annual survey that Urbis conducts of all major retail centres across Australia. They therefore provide a robust and realistic estimate of actual turnover per sq.m for different product groups and centre types.

As shown in the table, average trading levels vary significantly by product group, from ~\$2,320 per sq.m for bulky goods up to ~\$12,140 for food retail.

Table A.4.1 also outlines the market shares we have adopted for each trade area sector and product group. These rates effectively represent the share of floorspace demand that is likely to be captured by the subject site.

Given the limited competing supply, the highest shares have been adopted for the primary trade area (15-55%) followed by the secondary west trade area (5-30%). Relatively low market shares have been adopted for the secondary south trade area (0-5%) given the proximity of the planned Lowes Creek Maryland Precinct Local Centre.

Given the highly localised trade area, we have only allowed for a modest 5% demand from residents living beyond the trade area (i.e. can include those who work in the trade area but live elsewhere).

On the basis of these assumptions, we estimate the subject site will be able to support up to ~6,600 sq.m (or ~7,760 sq.m of GFA) of retail floorspace at build-out, including ~4,800 sq.m (or ~5,645 sq.m of GFA) of food retail floorspace.

The majority of this floorspace (~4,960 sq.m) will be required to meet the needs of primary trade area residents, while the remaining ~1,640 sq.m will be required to meet the demand of secondary trade area residents, and demand from beyond the trade area.

RETAIL FLOORSPACE DEMAND ANALYSIS

Projected Supportable Retail Floorspace – Subject Site, Build-Out (2056+)

Table A.4.1

	FOOD RETAIL	FOOD CATERING	APPAREL	HOMEWARES	BULKY GOODS	LEISURE / GENERAL	RETAIL SERVICES	TOTAL RETAIL
Retail Spend – Trade Area (\$M)								
Primary	\$78.8	\$27.1	\$19.3	\$16.1	\$22.5	\$23.5	\$6.7	\$194.1
Secondary South	\$45.1	\$15.5	\$11.1	\$9.2	\$12.9	\$13.4	\$3.9	\$111.1
Secondary West	\$32.4	\$11.2	\$7.9	\$6.6	\$9.3	\$9.7	\$2.8	\$79.9
Total Trade Area	\$156.4	\$53.8	\$38.3	\$31.9	\$44.7	\$46.5	\$13.3	\$385.0
Average Trading Level per Sq.m								
Average Trading Level (\$/sq.m)	\$12,140	\$11,520	\$6,830	\$7,370	\$2,320	\$10,120	\$8,400	\$7,272
Total Floorspace Demand – Trade Area (sq.m)								
Primary	6,494	2,355	2,828	2,182	9,712	2,318	801	26,689
Secondary South	3,718	1,348	1,619	1,249	5,560	1,327	459	15,281
Secondary West	2,672	969	1,164	898	3,996	954	330	10,982
Total Trade Area	12,884	4,672	5,611	4,328	19,268	4,599	1,589	52,952

RETAIL FLOORSPACE DEMAND ANALYSIS

Projected Supportable Retail Floorspace – Subject Site, Build-Out (2056+) cont...

Table A.4.1

	FOOD RETAIL	FOOD CATERING	APPAREL	HOMEWARES	BULKY GOODS	LEISURE / GENERAL	RETAIL SERVICES	TOTAL RETAIL
Market Shares – Subject Site (%)								
Primary	55.0%	15.0%	5.0%	5.0%	0.0%	15.0%	55.0%	18.6%
Secondary South	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	1.4%
Secondary West	30.0%	5.0%	5.0%	5.0%	0.0%	5.0%	30.0%	10.0%
Total Trade Area	35.1%	8.5%	3.5%	3.5%	0.0%	8.5%	35.1%	11.8%
Demand from Beyond the Trade Area					5.0%			
Supportable Floorspace – Subject Site (sq.m)								
Primary	3,572	353	141	109	0	348	441	4,964
Secondary South	186	0	0	0	0	0	23	209
Secondary West	802	48	58	45	0	48	99	1,100
Beyond	240	21	11	8	0	21	30	330
Supportable Floorspace	4,799	423	210	162	0	416	592	6,602

Source: Urbis Shopping Centre Benchmarks 2021; MarketInfo, Transport for NSW, Deep End Services, AEC, DPE; Urbis

RECOMMENDED CENTRE COMPOSITION

Key Findings

Drawing on the subject site's supportable quantum of retail floorspace estimated in Table A.4.1 and Urbis' extensive database of successful shopping centres, we have outlined an indicative centre composition in Table A.4.2.

As shown in the table, we recommend the subject site accommodate a single-supermarket shopping centre. This centre would be anchored by a single full-line supermarket (~4,000 sq.m), supported by 400 sq.m of mini-major floorspace (potentially a large fresh food grocer or liquor store) and 1,500 sq.m of retail specialty floorspace.

We have also provided a recommended mix of retail specialty floorspace in Table A.4.3.

The indicative mix of specialties includes 600 sq.m of food tenancies (food retail and food catering), 200 sq.m of apparel, 150 sq.m of homewares, 200 sq.m of leisure/general, and 350 sq.m of retail services (e.g. hairdresser, dry cleaner, massage, key-cutter).

In addition to the 5,900 sq.m of retail floorspace, we recommend a further 1,600 sq.m of non-retail floorspace be provided in the centre (consistent with Urbis' benchmarks for supermarket based centres).

This non-retail floorspace could accommodate uses such as gyms, medical centre/suites, and local financial services (banks, accountants, etc).

Notably, the proposed single-supermarket shopping centre at the subject site does not account for the total ~6,600 sq.m of retail floorspace floorspace (or ~7,760 sq.m of GFA) estimated to be supportable at the subject site at build-out. This ~700 sq.m of additional supportable floorspace (~820 sq.m of GFA) can therefore be provided in a very small centre elsewhere in the precinct.

Indicative Centre Composition

Table A.4.2

	GLA (SQ.M)	% OF TOTAL GLA	GFA (SQ.M)*	INDICATIVE NO. OF TENANTS
Supermarket	4,000	53%	4,700	1
Mini-Major	400	5%	470	1 (e.g. grocer, liquor)
Retail Specialties	1,500	20%	1,770	See Table A.4.3
Total Retail	5,900	78%	6,940	
Non Retail	1,600	22%	1,880	7-8 (e.g. gyms, medical centre / suites, and local financial services)
Total Centre	7,500	100%	8,820	

*Based on benchmark conversion rate for GFA to GLA of 85%
Source: Urbis Shopping Centre Benchmarks 2021

Indicative Specialty Mix

Table A.4.3

	GLA (SQ.M)	% OF SPECIALTY GLA	INDICATIVE NO. OF TENANTS
Food Retail	200	13%	1-2 (e.g. bakery, butcher)
Food Catering	400	27%	4-6 (e.g. take-away, casual dining)
Apparel	200	13%	2
Homewares	150	10%	2
Leisure/General	200	13%	2 (e.g. newsagents, florist, giftshop)
Retail Services	350	23%	4-6 (e.g. dry cleaners, hairdresser, massage, key-cutter, optometrist)
Total Specialties	1,500	100%	15-20

Source: Urbis Shopping Centre Benchmarks 2021

PROJECTED EMPLOYMENT GENERATION

Key Findings

In addition to providing recommendations as to centre composition, we also estimated the number of jobs likely to be supported by the proposed retail centre at the subject site upon completion.

These estimates are based on industry standard floorspace per job benchmarks.

As shown in Table A.4.4, a total of ~360 direct jobs are expected to be generated by the proposed centre.

Approximately ~230 of these jobs are expected to be generated by the retail uses on the site with a further ~130 jobs generated by non-retail uses.

The proposed centre would therefore provide local job opportunities for residents moving into the SWGA, as well as contributing to job targets set out in the Greater Sydney Region Plan (2018).

Projected Employment – Subject Site

Table A.4.4

LAND USE	GLA (SQ.M)	JOB DENSITY (SQ.M/JOB)	JOBS (NO.)
Supermarket	4,000	25	160
Mini Major	400	30	13
Retail Specialties	1,500	25	60
Non Retail	1,600	45	131
Total Centre	7,500		364

Source: Urbis, Melbourne CLUE, PLUC



PART B: WENTWORTH ROAD PRECINCT ROLE AND FUNCTION ANALYSIS

PRECINCT ROLE AND FUNCTION ANALYSIS METHODOLOGY

As part of the development of the master plan for the Belmore Road Precinct, Camden Council have requested that the master plan be extended to include a 6.4-hectare parcel of land to the northeast, bounded by Wentworth Road, The Northern Road and Bringelly Road (the Wentworth Road Precinct).

Therefore, there is a need to undertake analysis to determine the appropriate role and function of the Wentworth Road Precinct and the nature of land uses that should be accommodated in the precinct and facilitated by the master plan.

As such, in addition to the retail demand analysis presented in Part A, Urbis have also undertaken a success factor and synergies analysis of the Wentworth Road Precinct to determine the appropriate role and function of the precinct and the nature of land uses that would be best suited for inclusion within.

Urbis' analysis of the Wentworth Road Precinct's future role and function has involved the following tasks:

- **Site Assessment** – Analysed and assessed the key characteristics of the Wentworth Road Precinct and surrounding area, including size and location of the site, accessibility, existing and planned surrounding land uses, and infrastructure
- **Land Use Success Factors Analysis** – Assessed the Wentworth Road Precinct and its key characteristics against the key success factors for residential and employment-generating land uses
- **Strategic Context and Synergies Analysis** – Analysed and assessed the extent of potential synergies and complementarity of residential and employment-generating land uses with the Western Sydney Airport, Aerotropolis precincts and existing and planned surrounding land uses
- **Precedent Projects** – Researched sites in a similar locational context to identify the nature of uses typically accommodated in these locations
- **Recommendations** – Based on the outcomes of the Land Use Success Factors Analysis, Strategic Context and Synergies Analysis and Precedent Projects, we provided recommendations as to the appropriate role and function of the Wentworth Road Precinct and the nature of land uses that should be accommodated within.

B.1 SITE ASSESSMENT

Key Findings

The Wentworth Road Precinct comprises a 6.4-hectare area, situated immediately adjacent to the Belmore Road Precinct. It is bounded by Bringelly Road to the north, The Northern Road to the east and Wentworth Road to the south-west.

The precinct is currently zoned RU4 Primary Production Small Lots under *the Camden Local Environment Plan 2010* and accommodates low intensity agricultural and rural residential land uses.

The land to the west of the Wentworth Road Precinct (i.e. the Belmore Road Precinct) is predominantly rural farmland that is expected to transition to residential neighbourhood centre uses over the coming years, in accordance with the Belmore Road Precinct Master Plan.

Bringelly Village is also located immediately west of the precinct, which features convenience retailers including a grocer, pharmacy and post office. Additional amenities including Bringelly Community Centre and Bringelly Park are also situated immediately north-west of the precinct.

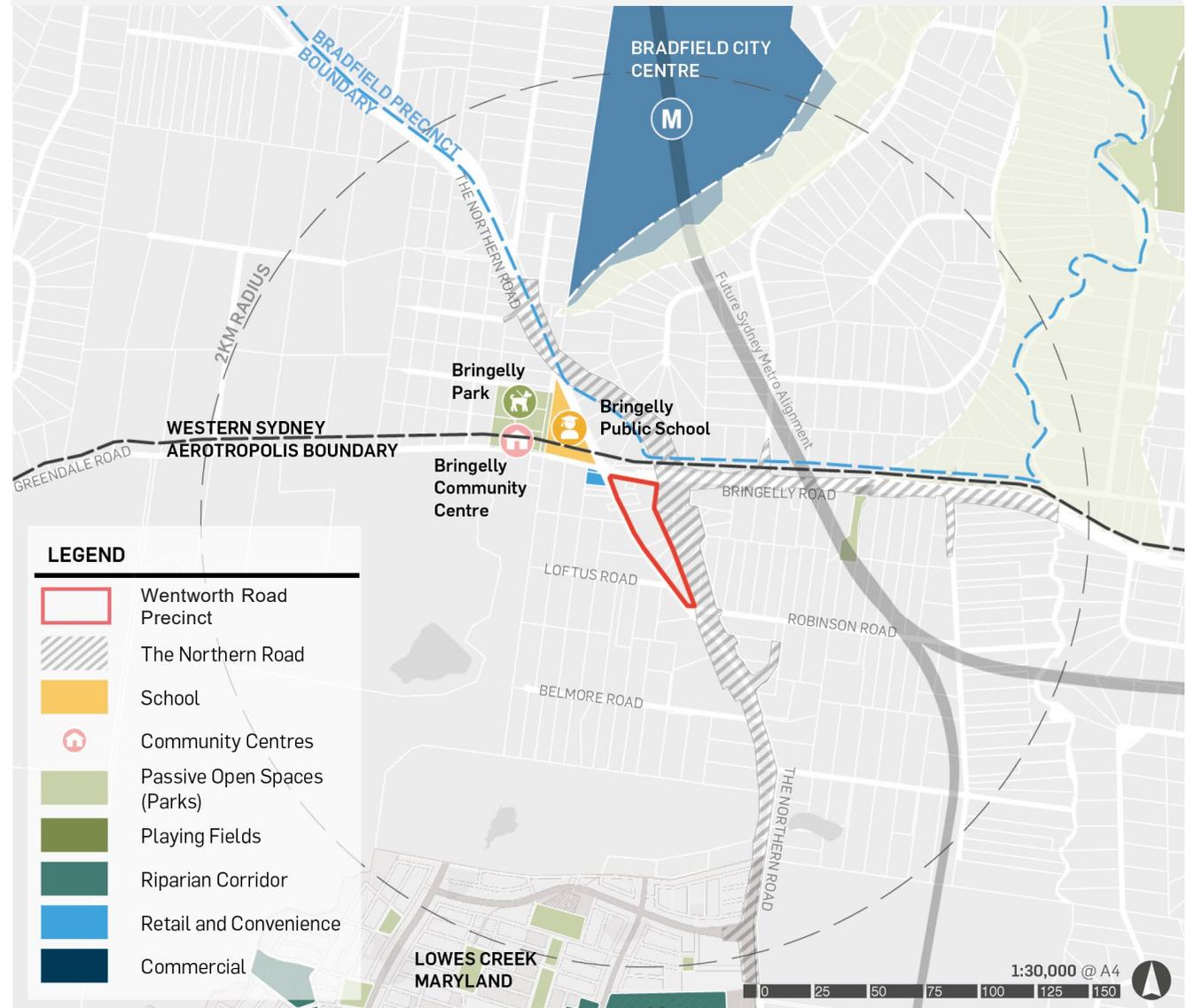
The site benefits from frontage to The Northern Road, allowing for high exposure to passing traffic on a major arterial road and direct access to the future Western Sydney Airport and Aerotropolis.

The Northern Road and Bringelly Road intersection has recently undergone a two to four lane expansion and construction of an overpass. This will ensure increasing traffic volumes as a result of the Airport commencing operations in 2026 can be accommodated.

The planned Bradfield City Centre, is also situated ~2 km north of the site, and is set to be transformed into a green centre focused on defence, aerospace and advanced manufacturing. The centre will also feature a Metro station, with direct connections to the Airport. Construction is anticipated to commence in 2022.

Wentworth Road Precinct

Map B.1



B.2 LAND USE SUCCESS FACTOR ANALYSIS

Key Findings

Determining an appropriate role and function for the Wentworth Road Precinct is primarily a question of whether the precinct should accommodate residential land uses and/or employment-generating land uses.

We have therefore assessed the precinct and its key characteristics against the key success factors for residential and employment-generating land uses (e.g. industrial, bulky goods retail, large format retail, service station) to determine which type of use best aligns to the inherent characteristics of the precinct.

The key success factors for residential and employment-generating land uses are described in Tables B.1 and B.2, respectively.

Tables B.3 and B.4, overleaf, outline the findings of our land use success factor analysis for the Wentworth Road Precinct.

As shown in these tables, our analysis finds the Wentworth Road Precinct highly suited to employment-generating land uses and moderately suitable for residential land uses.

Residential Land Use Success Factors

Table B.1

FACTOR	DESCRIPTION
Attractive views and quiet surroundings	Attractive views and northerly aspects that maximise light and climate benefits are key to the success of residential uses. Quiet surroundings and sufficient privacy are also important factors for residential uses
Access to amenities and services	Easy access to shops, public transport, open/recreational spaces, health services, schools, entertainment and dining options are very important for the success of residential uses
Employment opportunities	Access to employment opportunities is increasingly important for residential uses with residents preferring to live close to work in order to minimise travel times and improve work/life balance
Transport accessibility	Access to good public transport and road infrastructure are critical to the success of residential uses, particularly linkages to the major employment centres and amenities
Availability of choice and competing supply	The quantum, quality and location of other residential developments in an area can influence the demand and need for additional residential uses

Employment-Generating Land Use Success Factors

Table B.2

FACTOR	DESCRIPTION
Proximity to customers and workforce	Being located close to potential customers and employees are very important to the success of employment-generating land uses such as industrial and bulky goods retail
Access to major arterial roads and motorway network	Easy access to major arterial roads and motorways are critical to the success of employment-generating uses as it enables efficient supply chain movements, from suppliers through to customers
High visibility to passing traffic	Employment-generating uses such as large format and bulky goods retail, service stations and light industrial uses all benefit from high levels of exposure to passing traffic along major roads and motorways
Availability of parking	The provision of ample vehicle parking spaces for suppliers, employees and customers is critical to the success of employment-generating uses
Level of competition	The number, scale and location of competing employment-generating uses in an area can influence the demand and need for additional employment-generating uses

B.2 LAND USE SUCCESS FACTOR ANALYSIS – RESIDENTIAL LAND USES

Residential Land Use Success Factors

Table B.3

FACTOR	PRECINCT RATING	COMMENTARY
Attractive views and quiet surroundings	Low	<ul style="list-style-type: none"> ✓ The precinct has potential to deliver dwellings with northerly aspects to maximise light and climate benefits. ✗ The precinct is situated immediately adjacent to The Northern Road, a major arterial road with B-double truck access. This has potential to generate noise and odour disturbances for residents. ✗ The precinct's unattractive views overlooking The Northern Road detract from its suitability for residential uses.
Access to amenities and services	High	<ul style="list-style-type: none"> ✓ Retail: Bringelly Village provides small-scale convenience retail immediately west of the precinct while the proposed neighbourhood centre in the Belmore Road Precinct is expected to provide additional convenience retail. The sub-regional centre, Oran Park Podium, is also situated ~10 km south of the precinct. ✓ Open/recreational space: Bringelly Park is situated to the north-west of the precinct. Dawson Damer Splash Park (8.9 km south) and Country Club Gledswood Hills (13.9 km southeast) also provide additional recreational amenity to the broader area. ✓ Health services: Bringelly Family Medical Practice is immediately west of the precinct while Camden Hospital is situated 16.8 km south. ✓ Schools: the region features a mix of public and private schools, including Bringelly Public School, directly north-west of the precinct, Belfield College (3.7 km east) and Rossmore Public School (4.7 km east). ✓ Entertainment and dining: There are no entertainment and dining options currently servicing the precinct. However, dining, entertainment and leisure uses have been proposed for the future Bradfield City Centre (2 km north) and Gledswood Hills town centre (14 km southeast).
Employment opportunities	High	<ul style="list-style-type: none"> ✓ The future Bradfield City Centre, ~2 km north of the precinct, is intending to support up to 17,600 highly skilled jobs across advanced industries such as defence, aviation and aerospace and drive the creation of 200,000 new jobs across western Sydney. Leppington is also set to become a major centre, supporting up to 12,500 jobs by 2036. ✓ The Narellan strategic centre is situated 12 km south of the precinct, within the Camden LGA, supporting a large workforce across its retail, civic and commercial offerings. It is supported by a network of town centres, including Oran Park (8.7 km south) and Camden (15.8 km south).
Transport accessibility	Moderate	<ul style="list-style-type: none"> ✓ Travelling by car is currently the primary mode of transport for residents wanting to access local amenities near the Wentworth Road Precinct. ✗ There are currently no train stations within walking distance of the precinct. However, Leppington Station is accessible via car (8 mins) or bus (19 mins), allowing for direct connections to key commercial centres including Liverpool, Parramatta, Strathfield and the Sydney CBD. ✗ The precinct is serviced by a limited number of bus routes to Liverpool via Leppington and Casula. No public bus routes are currently operating along The Northern Road from the precinct. ✓ Future infrastructure projects are expected to enhance the accessibility of the precinct, including the Western Sydney Airport, the North South Rail Line (connecting St Marys to Macarthur) and the South West Rail Link Extension (connecting Leppington to the Aerotropolis).
Availability of choice and competing supply	Moderate	<ul style="list-style-type: none"> ✗ Within the SWGA, developments in Leppington, Edmondson Park and Oran Park have experienced high take-up rates in recent years. Relative to the precinct, these suburbs offer the benefit of proximity to train stations (Leppington and Edmondson Park) and having an established retail and civic offering (Edmondson Park and Oran Park). ✗ Relative to the Wentworth Road Precinct, the Belmore Road Precinct, provides a more attractive location for residential uses.
OVERALL	Moderate	<p>The Wentworth Road Precinct is well serviced by amenities and close to major employment nodes in the region. However, the relatively poor transport accessibility, significant competing supply of residential land uses in better locations and the precinct's proximity and views to The Northern Road undermine its suitability for substantial residential uses. Nonetheless, the scale and positioning of the site presents an opportunity for low density and large lot residential uses.</p>

B.2 LAND USE SUCCESS FACTOR ANALYSIS – EMPLOYMENT-GENERATING LAND USES

Employment-Generating Land Use Success Factors

Table B.4

FACTOR	PRECINCT RATING	COMMENTARY
Proximity to customers and workforce	High	<ul style="list-style-type: none"> ✓ The precinct is situated in close proximity to future residential growth areas and hence a large pool of potential customers and employees. This includes the Belmore Road Precinct, immediately west of the site, which is projected to accommodate up to 10,400 residents, and the Lowes Creek Maryland Precinct, approximately 1 km south of the precinct, which is estimated to house up to 22,400 residents. ✓ Other significant greenfield residential developments nearby (e.g. Oran Park, Leppington) in addition to employment areas (e.g. Bradfield) are also expected to generate demand for nearby employment opportunities, services and supply chain linkages.
Proximity to major arterial roads and motorway network	High	<ul style="list-style-type: none"> ✓ The precinct is adjacent to The Northern Road, with northbound and southbound access via Bringelly Road. This allows for direct connections to Penrith to the north, via the Western Sydney Airport, and Campbelltown to the southeast, via Narellan. The Northern Road is also accessible to B-double trucks. ✓ The Northern Road has recently undergone a 2 to 4-lane expansion, helping to ease traffic congestion in the area. ✓ The precinct is a relatively distant 13.6 km away from the nearest motorway entrance (M5 and M7 Motorways). However, the future Outer Sydney Orbital is a potential motorway and freight rail line corridor that will connect the North West and South West Sydney Growth Areas. The recommended corridor indicates a potential on and off-ramp along Greendale Road, ~3.3 km west of the precinct.
High visibility to passing traffic	High	<ul style="list-style-type: none"> ✓ A 2017 analysis by Infrastructure Australia showed that from 2015, The Northern Road (between Oran Park and South Penrith) would see an increase of around 40,000 vehicles per day, to reach ~75,000 vehicles by 2036. Given the precinct's elevation and frontages to The Northern Road, businesses will benefit high levels of exposure to this significant volume of passing traffic daily.
Availability of parking	High	<ul style="list-style-type: none"> ✓ Given that the precinct is situated within a greenfield area, parking considerations can be effectively managed and incorporated into future planning of the precinct.
Availability of choice and competing supply	High	<ul style="list-style-type: none"> ✓ The Camden LGA is facing constrained future supply of employment lands, rising capital values and rental escalation in key employment precincts¹. The precinct has the potential to help ease these supply and rental pressures by supplying additional land in a prime location in close proximity to the Western Sydney Airport and Aerotropolis, the Agribusiness Precinct and the employment lands corridor investigation area to the east of The Northern Road. ✓ There is a lack of large format retail and bulky goods uses in the surrounding area with the nearest centre being Crossroads Casula, situated a relatively distant 15 km east of the precinct. These uses could be readily accommodated at the precinct and would significantly benefit from the high levels of exposure to The Northern Road ✓ Given its location with high levels of exposure to The Northern Road, the precinct has significant potential to accommodate a service station. The nearest service station is BP Truckstop Rossmore, situated 3.7 km east of the precinct, accessible only to eastbound traffic.
OVERALL	High	<p>The precinct is ideally located along a major arterial road, with high accessibility and visibility to passing traffic. It is situated in close proximity to a large workforce and customer base. Given constraints in the future supply of employment lands within the LGA, the precinct is well placed to contribute critical land at the southern gateway to the Aerotropolis.</p>

¹Draft Camden Centres and Employment Lands Strategy (June 2021)

B.3 STRATEGIC CONTEXT AND SYNERGIES ANALYSIS

Key Findings

The Wentworth Road Precinct is situated within the Camden LGA, ~8 km south of the Western Sydney Airport and Aerotropolis (WSAA). Anticipated for completion in 2026, the airport will be a major catalyst for population, employment and economic growth in western Sydney.

Within the WSAA, there are a number of planned precincts, including the Aerotropolis Core (i.e. Bradfield City Centre), and the Agribusiness Precinct.

To ensure the potential opportunities presented by the planned Western Sydney Airport and Aerotropolis are maximised, Camden Council has prepared a Draft Camden Centres and Employment Land Strategy (ELS).

Released in June 2021, the ELS sets out a 20-year strategic vision for the LGA's retail centres, industrial lands and urban services lands, including those interfacing with the Western Sydney Airport and Aerotropolis.

The ELS notes that the LGA will face a shortage of industrial and urban services land (i.e. land zoned IN1, IN2, B5 and B7) by 2036, potentially occurring as early as 2026. The impacts of this constrained supply have begun to emerge in existing employment precincts within the LGA. This includes Smeaton Grange and Gregory Hills, in which the ELS notes rising capital values and rental escalation due to this lack of supply.

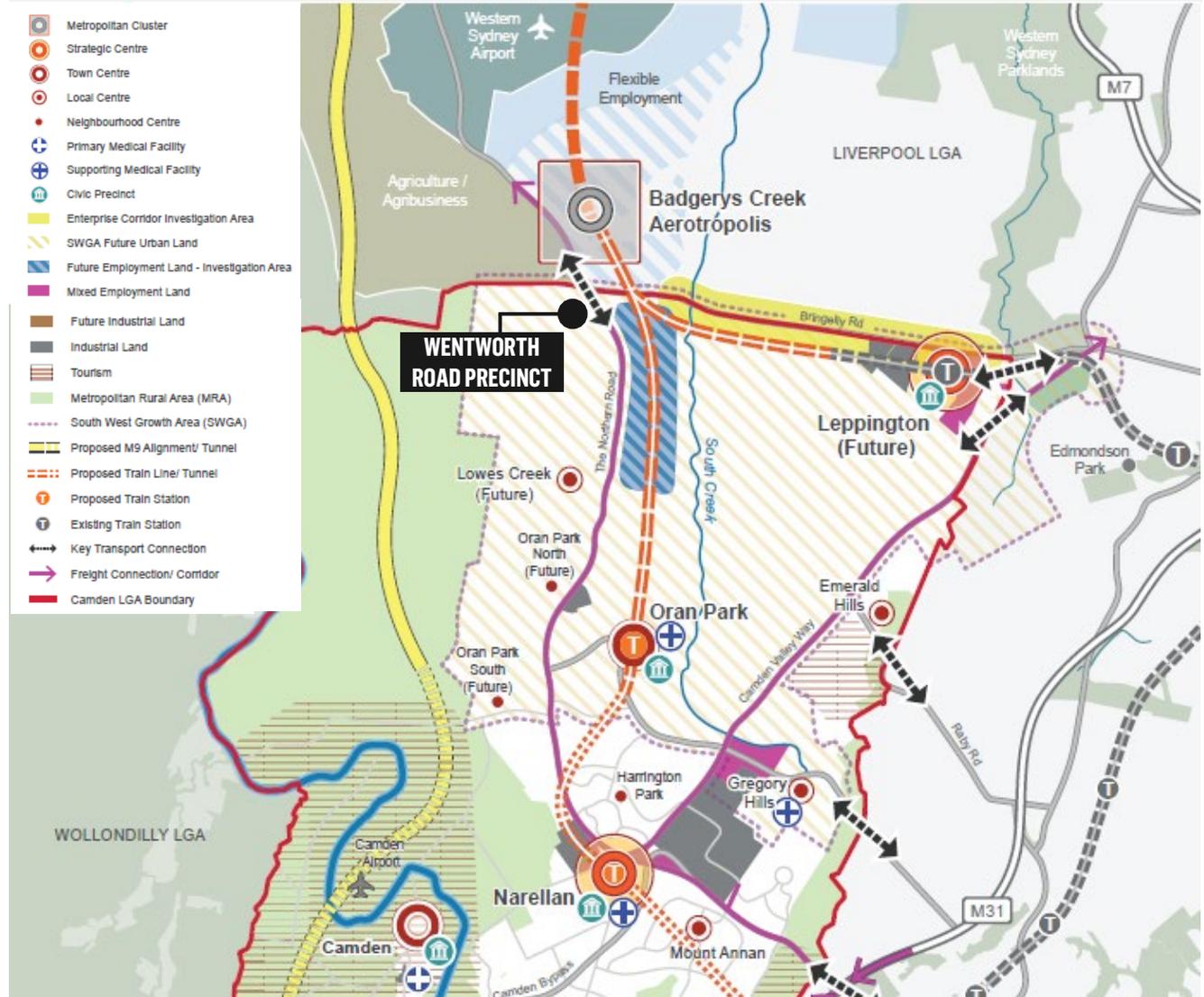
The ELS highlights the importance of locating employment lands close to transport corridors, such as arterial roads or motorways. This maximises efficient access to and from the precinct for suppliers and customers.

Of particular note, and as shown in Figure B.1, the ELS has identified a potential future employment corridor to the east of The Northern Road for further investigation. This employment corridor is located in adjacent to the Wentworth Road Precinct.

Based on this strategic context, we have analysed and assessed the extent of potential synergies and complementarity of residential and employment-generating land uses at the precinct with the existing and planned surrounding land uses in Table B.5, overleaf.

Strategic Context: Vision for 2040

Figure B.1



Source: Draft Camden Centres and Employment Land Strategy (June 2021)

B.3 STRATEGIC CONTEXT AND SYNERGIES ANALYSIS CONT...

Potential Synergies

Table B.5

NEARBY PRECINCTS	RESIDENTIAL LAND USE SYNERGIES	EMPLOYMENT-GENERATING LAND USE SYNERGIES
<p>Western Sydney Airport</p> <p><i>Estimated to open in 2026, the airport's 24/7 operations will support domestic and international passenger airlines and dedicated airfreight terminals.</i></p>	<p style="text-align: center;">Moderate</p> <ul style="list-style-type: none"> Residents would have potential to benefit from convenient and direct access to the Airport for air travel, as will their visiting interstate and international friends and family 	<p style="text-align: center;">High</p> <ul style="list-style-type: none"> Businesses will have opportunities able to leverage off proximity to the Airport's airfreight terminal, promoting efficient supply chain movements Businesses requiring employees to travel for work will have convenient and direct access to the Airport for air travel
<p>Aerotropolis Core / Bradfield City Centre</p> <p><i>Bradfield City Centre will support advanced industrial and commercial uses, creating business and employment opportunities. Supporting uses within the centre are set to include parks, retail, community facilities, childcare, dining, entertainment and leisure.</i></p>	<p style="text-align: center;">Moderate</p> <ul style="list-style-type: none"> Significant employment opportunities within the Bradfield City Centre could attract new residents wanting to live closer to work The centre will deliver additional amenities and services to meet the needs of local residents 	<p style="text-align: center;">High</p> <ul style="list-style-type: none"> The advanced industrial and commercial uses planned for Bradfield are likely to require supply chain inputs from supporting industries that could be accommodated in nearby area such the Wentworth Road Precinct
<p>Agribusiness Precinct</p> <p><i>The Agribusiness Precinct will connect local producers and manufacturers with interstate and overseas markets, due to its proximity to the airfreight terminal.</i></p>	<p style="text-align: center;">Low</p> <ul style="list-style-type: none"> Employment opportunities within the Agribusiness Precinct could attract new residents wanting to live closer to work 	<p style="text-align: center;">High</p> <ul style="list-style-type: none"> Given the time-sensitive, perishable nature of fresh produce, freight network efficiency is imperative to the viability of the agribusiness industry. The Wentworth Road Precinct has the potential to support the producer-to-consumer supply chain by potentially acting as an intermediary location for pick and pack to the export market or within a freight forwarding role.
<p>The Northern Road Future Employment Land Investigation Area</p> <p><i>The Northern Road Precinct has the potential to play a key role in supporting the growth of the Aerotropolis, by offering complimentary centres of economic activity around the airport site.</i></p>	<p style="text-align: center;">Low</p> <ul style="list-style-type: none"> Employment opportunities within The Northern Road Precinct could attract new residents wanting to live closer to work 	<p style="text-align: center;">High</p> <ul style="list-style-type: none"> Leveraging off its close proximity to The Northern Road Precinct, the Wentworth Road Precinct could act as a supporting, complimentary extension of employment-generating land uses. Together, these key sites along The Northern Road could act as a southern economic gateway from the SWGA to the WSAA.

Overall, employment-generating land uses have more significant synergies with the surrounding strategic precincts than residential land uses

B.4 PRECEDENT PROJECTS

We have researched sites in a similar locational context to identify the nature of uses typically accommodated in these locations. As shown below, we have found numerous examples of industrial, bulky goods and large format retail uses, and service stations that leverage off high visibility to significant volumes of passing traffic along major arterial roads and highways. Where available, we have noted average vehicle counts along these roads in 2019 (pre-COVID) based on Transport for NSW's (TfNSW) Traffic Volume Viewer.

IKEA Tempe (Princes Highway, Tempe)



Large format retail along the Princes Highway, a major arterial road near Sydney Airport.

St Peters Business Park (Canal Road, St Peters)



Business park on IN1-zoned land received exposure to an average of ~30,700 vehicles per day in 2019 (TfNSW).

Crossroads Casula (Camden Valley Way, Casula)



The intersection of Hume Highway and Camden Valley Way received exposure to ~54,200 vehicles per day in 2019 (TfNSW).

Cnr Canterbury Road and Canarys Rd, Roselands



Automotive repairs warehouse on B5-zoned land received exposure to an average of ~41,600 vehicles per day in 2019 (TfNSW).

B.4 PRECEDENT PROJECTS CONT...

Campbelltown Road, Campbelltown



Bulky goods retailers and automotive showrooms on B5-zoned land received exposure to an average of ~43,500 vehicles per day in 2019 (TfNSW).

Great Western Highway, St. Marys



Office warehouse units on B7-zoned land received exposure to an average of ~44,000 vehicles per day in 2019 (TfNSW).

Cnr Hume Highway and Boronia Road, Greenacre



7-Eleven on B5-zoned land received exposure to an average of ~59,900 vehicles per day in 2019 (TfNSW).

Homebush Business Park (Parramatta Road, Homebush)



A large business park on IN1-zoned land along Parramatta Road.

B.5 RECOMMENDATIONS

Based on the Land Use Success Factors Analysis, we found that the Wentworth Road Precinct is **highly suited** to employment-generating land uses and **moderately suitable** for residential land uses.

Furthermore, the Strategic Context and Synergies Analysis indicated that the **employment-generating land uses** have **more synergies** with the existing and planned surrounding precincts and land uses than residential land uses.

Other key findings of our analyses are summarised below:



Employment-Generating Uses

- ✓ Employment-generating uses at the Wentworth Road Precinct would benefit from proximity and high visibility to passing traffic along The Northern Road. The precedent projects highlight examples of sites that leverage off their high visibility to major roads.
- ✓ The Camden LGA is facing a critical shortage of employment lands, resulting in rental escalation and rising capital values on existing lands. The precinct is in a prime location at the southern gateway to the WSAA to attract prospective tenants, help ease supply pressures and provide a supporting role to surrounding future employment precincts.
- ✓ Businesses at the precinct could leverage off its proximity to the airfreight terminal and Bradfield, and access to The Northern Road, helping to increase supply chain efficiencies particularly for time-sensitive, aviation-based industries, such as agriculture or logistics.



Residential Uses

- ✓ Residential uses at the Wentworth Road Precinct would benefit from its proximity to major employment hubs, amenities and services in the nearby precincts and centres.
- ✗ However, the precinct's proximity and views to The Northern Road could result in significant and continuous noise and odour disturbances for prospective residents.
- ✗ There is also significant competing supply of residential land uses in better locations which benefit from more attractive outlooks and better transport accessibility and access to amenities and services.
- ✓ Nevertheless, there is an opportunity for part of the precinct to contribute to housing diversity by accommodating a mix of low density and large lot residential uses.

Based on these findings, we recommend the northern portion of the Wentworth Road Precinct (where it interfaces with the existing non-residential uses) be focused on supporting employment-generating land uses (e.g. industrial, bulky goods retail, large format retail, service station), while the southern portion of the precinct provide for a mix of low density and large lot residential uses.

