

Leppington Residential Core Economic Assessment

PREPARED FOR Aland

August 2023

FINAL

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Version	Version No.	Author(s)	Date	Review
Draft report	1.0	NS, RB, MB	31-07-2023	NS
Final report	2.0	NS, MB	21-08-2023	NS, GL

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Glossary of Terms

ABS	Australian Bureau of Statistics
Aerotropolis	Western Sydney Aerotropolis
CfP	Centre for Population
DPE	Department of Planning and Environment
TPA	Transport for NSW, Transport Performance and Analytics
LGA	Local Government Area
NSW Government	State Government for NSW
WPC	The Western Parkland City
NSW Government defines WPC as comprising eight LGAs – Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith and Wollondilly.	
WSI	Western Sydney International Airport

Population Projections

Official Australian Government Population Projections are produced by Centre for Population, which gives projections out 10 years at national, state, capital city and region of state/territory level.

Official NSW Government Population Projections are produced by DPE which give projections out to 2041 at LGA level, and at ABS SA2 level in DPE (2022). TPA then later produce projections at smaller area level for a longer period (out to 2066). The TPA projections align with the DPE projections.

CfP (2022)	Annual Population Statement released 6 January 2023
Macroplan/CfP (2023)	Updated CfP national estimates released 17 May 2023. Greater Sydney figures estimated by Macroplan.
DPE (2022)	Released April 2022. Used Census 2021, but not ABS revised population estimates for period 2016-21 which were released in July 2022.
DPE (2019)	Released 2019. Used Census 2016.
TPA (2022)	Aligned with DPE (2022) Projections, released November 2022
TPA (2019)	Aligned with DPE (2019) Projections, released 2019

1 Executive Summary

Aland's proposed Residential Core development will deliver 1305 dwellings – 1266 apartments and 39 townhouses - and 3,016 m² of floorspace for retail activity which will make a substantial contribution to emergence of the Leppington Town Centre (LTC) as a major strategic centre.

The LTC is located adjacent to the Leppington station, and its hinterland contains high growth greenfield area in the Camden Local Government Area (LGA) but it also borders the Austral-Greendale greenfield areas in the Liverpool LGA. The LTC has been earmarked as a future strategic centre by the Camden and Liverpool Councils and underpinning this future status are projections for substantial population growth.

The COVID-19 pandemic, which closed migration to Australia in early 2020 for about two years, had a significant short-term impact on population growth. However, the COVID-19 pandemic has since eased and there has been a stronger-than-expected rebound in migration. The latest Centre for Population (CfP) projections, released with the Commonwealth Government's May 2023 Budget, show substantially upgraded projections. While not re-capturing the population loss over those two years, the turnaround has been particularly sharp for Sydney.

Within Sydney, the distribution of growth is an equally important story. The outer greenfield areas such as in Camden LGA have been – and this preceded COVID19 - capturing a larger share of Sydney's growth which has offset the lower growth for Sydney.

The ABS preliminary estimates (before revisions based on the Census 2021) had understated growth in the Camden LGA. The estimate for 2021 for Camden was revised up by 11% or 12,000, and growth 2016-21 from 35% to 49%. Because the revised numbers were not released until July 2022, and because recent trends are influential in modelling projected population, these under-estimates fed into lower (than otherwise) Department of Planning and Environment (DPE) (2022) projections for Camden.

With the benefit of hindsight, the actual trajectory of growth over 2016-22 has the DPE (2019) projections looking more on track and the DPE (2022) projections well off the mark. Actual population in 2022 at 128,000 is marginally below the level projected by DPE (2019) but is already at the level projected by DPE (2022) for 2026.

Macroplan's population projections are closer to the DPE (2019) projections and have the population of Camden at 183,000 in 2031 and continuing to rise fast to 270,000 in 2041 and close to 400,000 in 2056 (Table 1).

The impact of this re-distribution of growth is even more apparent in the greenfield areas within Camden, and also in Liverpool. Reflecting this pattern, growth in the areas immediately to the north and south of Leppington Town Centre – which form the Primary Catchment area for the LTC in assessing demand for retail and commercial space – has been growing faster than expected. The Primary Catchment is projected to show strong growth over the forecast period, with population growing from about 11,700 in 2021 to almost treble to about 33,000 over the next 10 years (2031). However, that still leaves a large amount of untapped growth potential and longer term, the Primary Catchment is expected to grow to about 88,000 by 2041 and to over 148,000 by 2056.

Leppington Town Centre itself presently has a relatively small population, with no growth between 2016-21. Its population is projected to rise to over 4,000 by 2031 but with substantial growth to follow over the following two decades to take its population to close to 40,000 (Table 2). These projections depend on the degree to which high density apartments are allowed to be developed in the town centre, to respond to the demand.

Population growth translates to dwelling demand. There has been a trend towards apartments in the Western Parkland City which spans the eight LGAs in outer south west area of Sydney. This trend - which has been

recognised by the Greater Sydney Commission and the Camden Council - will be accelerated by the very significant investment in critical transport infrastructure, namely the Southwest Rail and the Metro Line to the new airport due to open in 2026, stimulating demand for higher density housing around the new station precincts. The metro/train sites are 'in the right locations', where people would like to live. Macroplan estimates that apartments will account for upwards of 25% of total dwelling demand in the Western Parkland City over 2021-41 and potentially about 20% and rising in Camden.

While the Camden Local Housing Strategy (LHS) 2021 recognised the trend towards apartments, it projected modest growth in apartments. However, a later report to Camden Council by Hill-PDA had a 15% share over 2021-31, and a share of 27% beyond 2031 – which equates to 22% over 2021-41 or marginally higher than Macroplan.

For Camden LGA, the stock of dwellings is projected to rise from 40,600 in 2021 by 61,900 to 102,500 in 2041 and rise further again to about 154,000 in 2056. Taking that growth over 2021-41, a 20% share of apartments would equate to about 12,400 apartments, while the Hill-PDA scenario would have demand towards 13,600 apartments.

The Greater Sydney Commission's Western Sydney District and Region plan identified the LTC as an emerging strategic centre which, given its location on a train station, would provide high-density housing as well as a mix of other land uses to support the residents. The Camden LHS and the draft Camden Council and Liverpool City Council Leppington Town Centre Planning Proposal (June 2023) recognises this role for the LTC. Over 2021-41, Leppington Town Centre, which will be a mix of mostly higher density apartments and some medium-density dwellings, is expected to see its stock of dwellings to rise from negligible in 2021 to 7,600 by 2041, including about 6,000 apartments. This will see it accounting for close to half the growth in apartment demand in Camden.

In the context of the potential number of dwellings - predominantly apartments – expected in the LTC, the proposal to develop a total of 1305 dwellings on the Residential Core site, will make a significant contribution. It will also play a valuable role in building momentum for that shift and in diversifying the dwelling mix available to the residents of Camden.

The growth of the population in the LTC, and the growth of population in its hinterland, is going to create demand for floorspace to accommodate a wide range of retail and commercial activities servicing the needs of the population. That demand will come from retail trade, a range of key non-retail activities which have a strong presence in town centres, but also the projected demand for office space from a range of commercial businesses which also serve local economies.

If we summarise demand for retail and commercial floorspace from all the sectors, close to 36,000 m² (GFA) of floorspace is supportable at the LTC by 2026 (Table 3). The total supportable floorspace increases to closer to 90,000 m² by 2036, 140,000 m² by 2046 and about 204,000 m² by 2056.

The proposal to develop 3,016 m² of retail space on the Residential Core site will accommodate some of the demand projected for the LTC and will be appropriate for this location within the LTC.

Table 1. Population and Dwelling Projections, Camden

	2021	2026	2031	2036	2041	2046	2051	2056
Population	120,000	149,900	182,900	221,100	271,500	314,200	354,500	398,300
Dwellings	40,600	52,700	66,200	82,100	102,500	119,900	136,300	153,800

Source: Macroplan

Table 2. Population and Dwelling Projections, Leppington Town Centre

	2021	2026	2031	2036	2041	2046	2051	2056
Population	500	1,200	4,200	10,700	18,200	25,500	32,800	39,900
Dwellings	250	550	1,800	4,500	7,600	10,700	13,700	16,700

Source: Macroplan

Table 3. Total supportable commercial retail floorspace in Leppington Town Centre, 2021 to 2056

	2021	2026	2031	2036	2041	2046	2051	2056
Retail Supportable Floorspace (m² GFA)								
Food Retail	8,500	12,800	18,600	31,000	41,900	48,400	59,800	71,300
Non-Food Retail	6,500	9,400	13,300	21,500	28,300	32,100	38,800	45,300
Total Retail	15,000	22,200	31,900	52,500	70,200	80,500	98,700	116,600
Non-Retail Supportable Floorspace (m² GFA)								
Medical	700	1,200	1,900	3,500	4,900	5,900	7,400	8,900
Allied Health	1,400	2,300	3,500	6,600	9,000	10,300	12,900	15,300
Childcare	700	1,200	2,100	4,200	6,000	7,100	9,000	10,700
Commercial Gymnasium	200	300	500	900	1,300	1,600	2,000	2,400
Total Non-Retail	3,000	5,000	7,900	15,200	21,200	24,800	31,300	37,300
Office Supportable Floorspace (m² GFA)								
Finance & Property	2,300	3,800	5,700	10,300	13,900	15,700	19,600	23,100
Professional Services	1,800	2,900	4,200	7,500	10,000	11,300	14,000	16,500
Public and Social Services	1,000	1,600	2,300	4,200	5,600	6,200	7,800	9,100
Education	190	270	390	650	860	990	1,230	1,460
Total Office	5,300	8,500	12,600	22,600	30,300	34,200	42,600	50,100
Total Supportable Floorspace (m² GFA)								
Total All	23,300	35,700	52,400	90,300	121,800	139,600	172,600	204,000

Source: Macroplan

2 Introduction

2.1 Aland Leppington Residential Core Planning Proposal

The Aland Leppington Residential Core Planning Proposal seeks to amend State Environmental Planning Policy (Precincts – Western Parkland City) 2021 (Parkland City SEPP) for the lots located at 156-166 Rickard Road (referred to as 'the site'). The site is strategically located, towards the centre of the Leppington Town Centre, within the Southwest Growth Area (SWGA) and to the south of the Leppington train station and immediately north of Leppington Public School. It is intended for the site to serve a central and residential accommodating function within the context of the town centre. The Planning Proposal is supported by the Leppington Residential Core Master Plan which facilitates the realisation of the Leppington Town Centre vision through the provision of a mixed use zoned land, that is intended to primarily facilitate residential uses, with some retail and other community serving uses on the ground.

The site is under the single control of the proponent and presents a highly capable land parcel, to the near south of the Leppington train station, that by its nature and location will function as an exemplar transit-oriented development in the Leppington Town Centre and South West Growth Area (SWGA). As such, the site presents an immediate opportunity to deliver new homes and jobs as part of a holistic and integrated land use and transport-oriented development. To the west of the Leppington Residential Core is an adjoining Aland landholding at 173-183 Rickard Road, Leppington which will be subject to a separate planning application.

The proposal seeks to rezone the site comprising 4.2ha of land in the Leppington Town Centre Precinct which was first identified by the NSW Government in 2013 as a key strategic centre within the SWGA to deliver new homes and jobs in close proximity to public transport. This was followed by the announcement of the Western Sydney International Airport (WSI) in 2014 and in anticipation of the delivery of Leppington Train Station in 2015.

In 2017, the Department of Planning and Environment (DPE) commenced a review of the Leppington Town Centre, to investigate a potential new vision and associated land use controls for the area. Following this review, DPE announced a new approach to precinct planning in 2019, returning precinct planning and rezoning powers back to Liverpool and Camden Councils. Both Councils have since consulted with key Government agencies in relation to the Leppington Town Centre and conducted a number of technical studies to inform a new planning proposal and rezoning of the town centre.

The Leppington Residential Core proposal provides a site-specific planning framework that will help support Council's vision for the Leppington Town Centre and enable it to transition into a new thriving transit-oriented residential community that builds on the NSW Government's vision and aspirations under the Western Sydney Growth Area program.

The Leppington Residential Core Master Plan is a potential 'catalyst project' that would complement the delivery of the wider Leppington Town Centre plan proposed by Camden Council. The proposal leverages the unique opportunity offered by the site's strategic location within the town centre and its close proximity to transport and educational infrastructure, by rezoning the site to enable transit-oriented development within a town centre and increasing building height and floor space ratio development standards to enable additional housing supply and diversity.

Aland has engaged Macroplan to prepare an Economic Assessment to inform the proposed dwelling numbers and retail space of the Residential Core Master Plan and Planning Proposal.

Aland propose the development of the Residential Core site in the LTC which will provide 3,016 sqm GFA of retail space. It is proposed to develop a total of 1266 apartments and 39 townhouses on the Residential Core site, in a mix of sizes subject to market demand.

2.2 Site Description

The land to which this proposal relates is 156-166 Rickard Road, Leppington. The site is accessed via Rickard Road and is located within the Leppington Town Centre. Leppington Town Centre extends across both the Camden and Liverpool LGAs; however, the site is located entirely within the Camden LGA portion of the town centre. The site is more broadly situated in the SWGA.

Figure 1 Site Aerial



Source: Urbis

2.3 Regional Context

The LTC has been identified as a strategic centre in the Greater Sydney Region Plan and the Western City District Plan. The Camden Council has re-affirmed its status in the Camden Local Strategic Planning Statement (LSPS) 2020 and the Camden Employment Lands Strategy (CELS) which was endorsed in 2022. A joint Camden-Liverpool Council Planning Proposal (PP) of June 2023 – currently being reviewed by DPE - has most recently endorsed the LTC as a major strategic centre.

A masterplan was completed in 2012 in anticipation of the Leppington station opening in 2015 and the impetus it would give to urban development in its proximity. However, at this point, for a variety of reasons, the LTC is still mostly vacant land. The joint Camden-Liverpool Council PP will lead to the development of a new masterplan.

Leppington Town Centre is located within an area which is starting to show rapid growth and expected to grow very strongly over the both the short and long term. There are population growth areas to the west, north and south of the LTC which are seen as part of the catchment area for the town centre.

The new Western Sydney International Airport (WSI) which will open in 2026 is part of wider employment area referred to as the Aerotropolis. The WSI is located to the west of the LTC and is going to be the catalyst for a substantial number of jobs and people. The Western Sydney Aerotropolis Plan (2020) projected total jobs across the wider Aerotropolis would total 35,000 by 2031, rising to 74,000 by 2041, and close to 140,000 by 2056.

From a residential perspective, the proposed new urban area next to the WSA – now known as Bradfield City and located around the Bringelly North metro station - is projected to have a population of about 4,000 by 2031, rising to about 17,000 in 2041 and close to 24,000 when fully developed. However, by far the largest bulk of the wider Aerotropolis workforce will need to be housed outside Bradfield City. In net terms it will be adding to demand for dwellings in Leppington and other locations and could help open up the corridor between Leppington and Bradfield.

To the north of the LTC is the Austral-Greendale area which was identified in the 2012 Masterplan as a source of demand for the LTC retail and commercial businesses. To the south is Leppington-Catherine Fields greenfield area which has also started to show significant growth.

To its east, there are significant established residential areas within the Liverpool LGA. These areas are largely low-density developments. The exception is the development occurring around the Edmondson Park Station which is located 6 kms or a 6-minute train ride from the LTC. The Edmondson Park town centre includes both medium and high-density development. There is strong growth now occurring centred on Edmondson Park Station which highlights the impact of the new Southwest rail line and is an indicator the future growth potential around the Leppington station.

2.4 Catchment Areas

In assessing demand for retail and commercial space in the Leppington Town Centre, the report has a defined primary and secondary catchment areas for the LTC (Figure 2). The primary catchment area largely comprises the suburbs of Leppington, Rossmore and Austral, while the larger secondary catchment comprises most of Camden LGA and parts of adjacent Liverpool and Campbelltown LGAs. The catchments are described in more detail in the Appendix.

2.5 Structure of the Report

This report is a summary report which is supported by two detailed reports, namely the Macroplan Leppington Town Centre Population Dwelling Demand Report and the Macroplan Leppington Town Centre Retail and Commercial Report.

In Section 3 of the report, we look at the population projections for Greater Sydney, for the outer west region of Sydney, for Camden and Liverpool LGAs, for the catchment area for the Leppington Town Centre and for the LTC itself. COVID19 – while now receding - has had a disruptive impact on population growth and also on population projections.

The population projections underpin projections for demand for medium and high-density dwellings which is outlined in Section 4. The background to this is looking at the trend towards apartment living across Sydney and more specifically in the outer urban markets and the impact of locations such as train/metro station in attracting demand.

Section 5 looks at potential demand for retail and commercial space in the LTC. There is a brief Conclusion and an Appendix which has more detailed descriptions of the population catchment areas and the metrics used in estimating demand for retail and commercial space.

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3 Population Projections

3.1 Sydney Population Growth

The COVID-19 pandemic which closed migration to Australia in early 2020 for about two years had a significant short-term impact on population growth – particularly for Sydney which is a major gateway for migrants entering Australia. At the time. It also led to significant downgrading of population projections. Official long-term projections by the Commonwealth Government (its Centre for Population) and NSW Government (Department of Planning and Environment (DPE)) released in mid-2022 substantially downgraded previous projections. Subsequently, however, the COVID-19 pandemic eased and there has been a stronger-than-expected rebound in migration which has benefited Sydney on the rebound. The latest Centre for Population projections, released with the Commonwealth Government's May 2023 Budget, show substantially upgraded projections.

In the case of Sydney, the DPE (2019) projections (Table 4) had Sydney's population growing to 5.6 million in 2021, then growing by about 1 million to 6.6 million in 2031 and then by about 925,000 to 7.5 million in 2041. In the event, the figure for 2021 came in at 5.25 million or 350,000 below expectations chiefly due to the COVID19 border closing. The DPE (2022) projections cut Sydney's expected growth to 2031 by almost half to 512,000 and growth 2031-41 by about 240,000 (over 25%), with projected population in 2041 reduced by 1 million to 6.5 million. Based on the now more optimistic Centre for Population (CfP) projections, Macroplan estimates that Sydney's population growth in the twenty years to 2041 will be at least 300,000 higher, with the 2041 estimate revised up to 6.8 million. While substantially upgraded, the loss of population during the more than two years of closed borders has not been entirely made up by the recent rebound in migration. Going forward, while there will probably be only limited further catch-up, growth is largely back on track.

Within Sydney, the distribution of growth is an equally important story. While COVID-19 may have boosted the appeal of outer area living, the trend to higher growth in the outer greenfield areas in Camden and Liverpool pre-dates COVID19. These areas are capturing a larger share of Sydney's growth which is offsetting the lower projected growth for Sydney.

3.2 Camden LGA Population Growth

For people making projections, the ABS preliminary estimates understated growth over 2016-21 in these outer areas. The preliminary estimates had growth in the Camden LGA – and particularly in the high growth areas within Camden LGA – well below the actual population growth (in the final revised ABS estimates). The estimate for 2021 for Camden was revised up by 11% or 12,000, and growth over 2016-21 from 35% to 49%. Because the revised numbers were not released until July 2022 and, because recent trends are influential in modelling projected population, these under-estimates fed into lower (than otherwise) DPE (2022) projections for Camden.

For Camden, the DPE (2022) projections (Table 5) lowered the expected 2031 population to 145,000, a significant 20% below the DPE (2019) projection for 180,000. With the benefit of hindsight, the actual trajectory of growth over 2016-22 has the DPE (2019) projections looking more on track and the DPE (2022) projections well off the mark. Actual population in 2022 at 128,000 is at the level projected by DPE (2022) for after 2027.

Macroplan's population projections are closer to the DPE (2019) projections and have the population of Camden at 183,000 in 2031 and continuing to rise fast to 271,000 in 2041 and close to 400,000 in 2056.

3.3 Cobbitty- Leppington SA2 Area Population Growth

Within Camden LGA, the impact of this re-distribution of growth is even more apparent. In the Cobbitty-Leppington SA2 area, which includes Oran Park and Leppington, the 2021 population estimate was revised up 32% from 37,600 to 49,500. In 2022, its population is at 56,700, which is marginally above the DPE (2019) projection for 2022 but a significant 47% above the DPE (2022) projection for 2022. The population in 2022 is at a level it was not projected by DPE (2022) to reach before 2028.

Again, the DPE (2019) projections look to be more on track and, taking a similar path, Macroplan's population projections have the population of Cobbitty-Leppington SA2 at 104,000 in 2031, and 184,000 in 2041.

3.3.1 Catherine Fields-Leppington SA2

With the rapid growth in the Cobbitty-Leppington SA2 area, the ABS 2021 Census has broken it into four SA2 areas, with Leppington in the newly defined Catherine Fields-Leppington SA2 area. The TPA (2019) and TPA (2022) projections – which are aligned with the DPE projections – give projections. The population of Catherine Fields-Leppington SA2 grew rapidly over 2016-22, from 5,900 to 14,600. Its population is substantially above the TPA (2022) projections but also well above the TPA (2019) projection for 2022 (Table 6).

Macroplan's estimates have the population roughly doubling to 29,000 in 2031, then growing substantially to close to 70,000 in 2041, which is ahead of the TPA (2019) forecast. This growth incorporates the boost from growth in the LTC.

3.4 Liverpool LGA Population Growth

The Liverpool LGA is a more established area than Camden. However, there are significant greenfield areas within Liverpool – Austral-Greendale and Edmondson Park – which are experiencing strong growth.

3.4.1 Austral-Greendale SA2

In the Austral-Greendale SA2 area, which is directly north of LTC, the 2021 population estimate was revised up 25% from 10,060 to 12,600. In 2022, its population is at 14,500, which is marginally below the DPE (2019) projection for 2022 but a significant 43% above the DPE (2022) projection for 2022. The population in 2022 is at a level it was not projected by DPE (2022) to reach before 2027 (Table 7).

Again, the DPE (2019) projections look to be more on track and, taking a similar path, Macroplan's population projections have the population of Austral-Greendale SA2 more than doubling to about 30,000 in 2031, and then rising sharply again towards 60,000 in 2041.

3.4.2 Edmondson Park SA2

Edmondson Park is east of LTC and built around the Edmondson Park Station, so it shares common characteristics with LTC. Its 2021 population estimate was revised up 75% from 6,900 to 12,100. In 2022, its population is at 14,200, which is at a level it was not projected by DPE (2022) to reach before 2041 (Table 8).

Again, the DPE (2019) projections look to be more on track but are still proving conservative, not fully accounting for the impact of Edmondson Park Station in driving development. The take-off in its growth highlights similar potential for the LTC. Macroplan's population projections have the population of Edmondson Park at 24,000 in 2031, and 38,000 in 2041.

3.5 Leppington Town Centre Growth

Leppington Town Centre is surrounded by greenfield areas which are all showing stronger than expected growth.

The shift in growth towards Leppington is expected to continue. The strong trends and projected growth identified in the Catherine Fields-Leppington SA2 and Austral-Greendale SA2 areas have been factored into the projections for the Primary Catchment area for the LTC (Figure 2) and for the LTC itself (Table 9).

Including as it does a number of high growth areas, the Primary Catchment is projected to show strong growth over the forecast period, with the population growing from about 11,700 in 2021 to almost treble to about 33,000 over the next 10 years (2031). That however still leaves a large amount of untapped growth potential and longer term, the Primary Catchment is expected to grow more than fourfold again to over 148,000 by 2056.

Leppington Town Centre presently has a relatively small population, with no growth shown between 2016-21. Its population is projected to rise to over 4,000 by 2031 but with substantial growth to follow over the following two decades to take its population to close to 40,000. These projections depend on the degree to which high density apartments are allowed to be developed in the town centre, to respond to the demand.

In aggregate, the Main Trade Area (MTA) reflects a sum of the Primary Sector and the five secondary sectors (see Figure 2). Because a number of secondary markets are lower growth, this moderates the MTA growth. Nonetheless, the growth is still substantial. From a population of about 145,000 in 2021, it rises to closer to 480,000 in 2056.

Table 4. Population, Actual and Projections, Greater Sydney

No.'000	2016	2021	2026	2031	2036	2041	2046	2051	2056
Actual	5,025	5,260	5,305 (2022)						
DPE 2019		5,611	6,128	6,609	7,079	7,535	7,974	8,364	8,755
DPE 2022		5,352	5,530	5,864	6,205	6,547	6,874	7,183	7,506
Macroplan 2023	5,025	5,260	5,629	5,999	6,377	6,760	7,132	7,488	7,825
Period Growth	416	235	370	369	378	383	372	357	337
Period Growth (%)	9.0%	4.7%	7.0%	6.6%	6.3%	6.0%	5.5%	5.0%	4.5%

Source: ABS, DPE, TPA, Macroplan

Table 5. Population, Actual and Projections, Camden LGA

No.	2016	2021	2026	2031	2036	2041	2046	2051	2056
Actual	80,300	120,000	127,700 (2022)						
DPE 2019		127,700	153,300	180,100	236,300	307,800	327,300	366,100	407,800
DPE 2022		108,000	123,900	144,900	168,000	197,800	228,900	258,300	289,000
Macroplan 2023	80,300	120,000	150,000	183,000	221,200	271,500	314,200	354,500	398,400
Period Growth	21,800	39,700	30,000	33,000	38,200	50,300	42,700	40,300	43,900
Period Growth (%)	37.3%	49.4%	25.0%	22.0%	20.9%	22.7%	15.7%	12.8%	12.4%

Source: ABS, DPE, TPA, Macroplan

Table 6. Population, Actual and Projections, Catherine Fields – Leppington SA2

No.	2016	2021	2026	2031	2036	2041	2046	2051	2056
Actual	6,000	12,600	14,600 (2022)						
DPE 2019		11,000	17,500	24,600	46,500	66,000	70,200	88,100	103,500
DPE 2022		7,900	10,600	15,500	22,700	33,700	45,600	57,400	69,000
Macroplan 2023	6,000	12,600	18,900	29,000	45,100	69,900	83,900	97,300	107,100

Source: ABS, DPE, TPA, Macroplan

Table 7. Population, Actual and Projections, Austral-Greendale SA2

	2016	2021	2026	2031	2036	2041	2046	2051	2056
Actual	9,300	12,600	14,600 (2022)						
DPE 2019		13,800	22,300	32,400	57,200	64,100	65,900	80,000	91,000
DPE 2022		10,100	13,600	22,700	34,400	42,400	50,400	57,800	57,800
Macroplan 2023	9,300	12,600	19,500	30,100	48,100	60,100	71,300	81,900	81,900

Source: ABS, DPE, TPA, Macroplan

Table 8. Population, Actual and Projections, Edmondson Park SA2

No.	2016	2021	2026	2031	2036	2041	2046	2051	2056
Actual	2,400	12,200	14,300 (2022)						
DPE 2019		10,300	13,800	18,000	23,100	29,400	32,300	38,000	42,000
DPE 2022		7,000	8,800	10,700	11,000	11,100			
Macroplan 2023	2,400	12,200	18,200	23,700	30,800	37,500	41,300	42,300	43,400

Source: ABS, DPE, TPA, Macroplan

Table 9. Population projections, selected catchments, 2016 to 2056

	2016	2021	2026	2031	2036	2041	2046	2051	2056
Leppington Town Centre	500	500	1,200	4,200	10,700	18,200	25,500	32,800	39,900
Balance of Primary Catchment	6,700	11,200	19,700	28,700	53,600	69,700	73,400	92,200	108,300
Primary Catchment	7,200	11,700	20,900	32,900	64,300	87,900	98,900	125,000	148,200
Secondary Catchments	85,200	133,200	158,800	193,300	223,800	252,400	278,000	302,600	328,900
Main Trade Area	92,400	144,900	179,800	226,100	288,100	340,300	376,900	427,500	477,100

Source: Macroplan

4 Dwelling demand

Population growth is the key driver of underlying demand for dwellings. Over 2021-41, when Camden's population is projected to grow 125% from 120,000 in 2021 to 271,000 in 2041, the demand that generates is expected to see the stock of dwellings rise by 152% from 40,200 to 102,500. The faster growth in demand for dwellings reflects a long-term trend to smaller households. This has reflected long-term socio-demographic factors such as the decline in birth rates leading to smaller families and increased life expectancy, leading to an increase in single households.

4.1 Broad Trends in Outer Western Sydney Markets

Camden's housing stock is dominated by low density detached houses, but the mix is changing in response to the same forces shifting demand towards higher density living across Sydney but also in the outer Sydney markets.

There has been a long-term trend in Sydney towards apartments. Between 2001 and 2021, the total number of dwellings grew by 35% but over the same period the number of apartments grew by 105% and it accounted for 53% of growth and lifted its share of the dwelling stock from 18% to 27%. While single and group households favour apartments more strongly, the trend to apartments has been clear across all household types (Table 10).

Table 10. Households Type Share in Apartments, Greater Sydney, 2001 and 2021

Apartment share of all dwellings									
% Share of All Dwellings	Couples with no children	Couples with children	Single parent	Other families	All families	Single HHs	Group HHs	Other	Total
2001	17%	6%	13%	28%	11%	29%	36%	39%	18%
2021	29%	13%	18%	34%	20%	39%	47%	34%	27%

Source: ABS Census 2001 & 2021

Spatially, the shift to greater density has been more pronounced in the inner areas of Sydney, reflecting the impact of the high value of land. In outer areas, where the value of land is lower, the markets have still been very much dominated by detached dwellings on single lots. However, the higher value of land around transport nodes (rail stations) has also encouraged higher density in these locations and this factor has contributed to a trend to apartments also occurring in outer areas. This is evident around stations in established areas such as Liverpool where the pressure for density is most apparent.

As of 2021, there were negligible apartments in the Camden LGA, so observing trends towards apartments is not possible. However, Camden is part of the Western Parkland City and across this larger outer urban market, the emerging trends can be observed. Compared with inner Sydney, it has a higher share of detached houses in its dwelling stock but, albeit at a slower rate of change, there has also been a clear shift in preference towards apartments. This is observed across all household types (Table 11). Over 2001-21, ABS Census data shows the share of detached houses declined from 83% to 79%, while the share of apartments rose from 4% to 7%.

The developing rail and metro network is creating highly sought-after locations which offer residents in the Western Parkland City the combination of increased connectivity to Greater Sydney and walkable access to retail and other community facilities. The Southwest rail line completed in 2016 was the first part of the new rail network, with two stations at greenfield locations in Edmondson Park and Leppington. As greenfield locations, these are generally lower cost locations compared with brownfield developments. The significant growth recorded

by Edmondson Park over 2016-2022 has provided some firm evidence of the attraction which these locations offer.

Based on these trends but in particular factoring in demand around stations, Macroplan's assessment is that over the period 2021-41, if supply is allowed to respond, apartments can lift their share of growth in dwellings in the Camden LGA towards 20%.

Table 11. Household Type Share in Apartments, Western Parkland City, 2001 and 2021

Apartment share of all dwellings									
% Share of All Dwellings	Couples with no children	Couples with children	Single parent	Other families	All families	Single HHs	Group HHs	Other	Total
2001	3%	2%	4%	8%	3%	8%	9%	8%	4%
2021	5%	3%	6%	11%	4%	12%	12%	12%	7%

Source: ABS Census 2001 & 2021

4.2 Strategic Direction and the Camden Council LHS 2021

The Greater Sydney Commission's Western Sydney District and Region plans - which has informed the Camden Local Strategic Planning Statement (2020) and Camden Local Housing Strategy (LHS) 2021 – identified the trend towards apartments and the desirability of apartments providing greater diversity in housing to meet the changing needs of the population. It also has identified the LTC as an emerging strategic centre which would provide high-density housing as well as a mix of other land uses to support the residents.

In line with the GSC's policy direction, the Camden LHS (2021) has a priority to increase diversity and assumes a shift to higher density housing in high amenity areas well supported by infrastructure (e.g., metro/rail stations). In the LHS, it presented low-density and high-density scenarios which had apartments accounting for 1% and 7% respectively of demand over 2021-36, not presented as targets but simply as possible scenarios in response to market demand driving the trend towards higher density.

Subsequently, a HillPDA report to Camden Council on the new planning proposal for LTC – completed after the LHS - argued that the LHS scenarios were too conservative given the factors driving the shift towards higher density across Sydney and outer western Sydney and the presence of stations making potential supply to meet that demand. Its report modelled a scenario which has about 15% of dwelling growth over 2021-31 in Camden LGA accounted for by apartments, and 27% of demand post-2031 - or about 22% over 2021-41. Consistent with Macroplan's conclusion, it had the shift occurring across all household types.

The Hill-PDA estimates are marginally more ambitious than Macroplan's but both are consistent with significant levels of demand for apartments emerging in the period ahead in the Leppington Town Centre.

4.3 Dwelling Demand in Camden and Leppington Town Centre

For Camden, reflecting supply needed to accommodate population growth, the stock of dwellings is projected to rise from 40,600 in 2021 to 102,500 in 2041 and closer to 154,000 in 2056 (Table 12). A 20% share of the growth of 61,900 over 2021-41, would equate to 12,400 apartments. The HillPDA model would have demand 13,600 apartments.

For Leppington Town Centre, which will be a mix of mostly higher density apartments and some medium-density dwellings (townhouses), its stock of dwellings is projected to rise from just 250 in 2021, to close to 7,600 by 2041

and then to 16,700 by 2056 (Table 13). Over 2021-41, its growth in apartments would account for about half of the projected rise in apartments in the Camden LGA.

In the context of the potential number of dwellings - predominantly apartments - in the LTC, the development plans to deliver a total of 1,305 dwellings on Residential Core site will contribute about 17% of the projected demand out to 2041.

In the context of the potential number of dwellings - predominantly apartments - in the LTC, the subject development plans to develop a total of 2,859 dwellings on the two sites, which will supply a mix of sizes of mostly apartments, seems consistent.

Table 12. Population and Dwelling Projections, Primary Catchment

	2021	2026	2031	2036	2041	2046	2051	2056
Population	11,700	20,900	32,900	64,300	87,900	98,900	125,000	148,200
Dwellings	4,700	8,400	13,300	25,800	35,000	39,500	49,700	58,900

Source: Macroplan

Table 13. Population and Dwelling Projections, Leppington Town Centre

	2021	2026	2031	2036	2041	2046	2051	2056
Population	500	1,200	4,200	10,700	18,200	25,500	32,800	39,900
Dwellings	250	550	1,800	4,500	7,600	10,700	13,700	16,700

Source: Macroplan

5 Retail and Commercial Floorspace Demand

5.1 Overview

The growth of the population in the Leppington Town Centre, and the growth of population in its hinterland, is going to create demand for floorspace to accommodate a wide range of retail and non-retail activities servicing the needs of the population. In order to assess the overall market potential for retail and commercial space on the subject site, Macroplan has considered the potential demand for the Leppington Town Centre as a whole. The analysis covers retail trade, a range of key non-retail activities which have a strong presence in town centres, but also the projected demand for office space from a range of commercial businesses which also serve local economies.

5.2 Retail Trade

In line with population growth the retail expenditure capacity of the main trade area is forecast to increase (in real terms) from around \$1.93 billion in 2021 to \$8.25 billion by 2056 (Table 14). The total retail expenditure capacity of residents in the primary sector is expected to increase from \$148 million at 2021 to \$2.45 billion by 2056.

The estimated retail floorspace demand by residents in the main trade area is forecast to increase from about 285,000 m² in 2021 to around 995,000 m² in 2056.

The LTC is expected to capture a high share of business in the LTC itself, and overall is expected to capture over 30% of trade in the primary catchment area and about 4% of trade in the secondary catchment areas. On that basis, up to 22,200 m² of retail floorspace is supportable in the LTC by 2026. By 2056, the amount of retail space supportable rises to over 116,000 m². This is based on conservative assumptions on the retained share, with new competing centres (e.g. new neighbourhood centres) taking some share of the primary market but (e.g. the new Bradfield city) particularly taking share from the secondary markets.

Table 14. Retail floorspace demand summary, Main Trade Area, 2021 to 2056

	2021	2026	2031	2036	2041	2046	2051	2056
Retail Expenditure (\$M)								
Expenditure	1,900	2,500	3,300	4,300	5,300	6,100	7,100	8,200
Retail Floorspace Demand (m² GFA)								
Food Retail	126,000	162,300	207,900	269,500	326,300	370,600	427,600	486,000
Non-Food Retail	158,900	199,100	248,100	311,800	367,500	407,600	458,700	509,100
Total Retail	284,900	361,400	456,000	581,200	693,700	778,300	886,300	995,100
Total Supportable Floorspace (m² GFA)								
Food Retail	8,500	12,800	18,600	31,000	41,900	48,400	59,800	71,300
Non-Food Retail	6,500	9,400	13,300	21,500	28,300	32,100	38,800	45,300
Total Supportable Floorspace in LTC	15,000	22,200	31,900	52,500	70,200	80,500	98,700	116,600

Source: Macroplan

5.3 Non-Retail Services

In all major town centres, in addition to core retail uses, there are a range of non-retail uses that support the overall function and amenity of the centre. These include uses such as medical centres, gymnasiums, childcare centres, banks, real estate agencies, and entertainment uses.

In this case, a range of non-retail facilities are expected to be supportable in LTC to serve the needs of existing and future local residents, with a provision of non-retail uses greatly enhancing the overall convenience and amenity the LTC. There is demand for a variety of non-retail facilities but the major sources of demand come from the following:

- Medical (GPs and specialists)
- Allied Health
- Childcare
- Commercial Gymnasium

For each of these segments of demand, floorspace demand is based on assumptions about demand per capita (e.g., GPs and specialists per 1,000 population), floorspace per service provider (e.g., per GP), and share captured by LTC. The assumptions are summarised in the Appendix.

Finance and property businesses are also well represented in retail centres – residential real estate agencies, banks (albeit less so with on-line banking) - and this is discussed separately below.

5.3.1 Medical

With a growing proportion of expenditure going toward healthcare costs, medical centres are an increasingly important use in retail centre developments. GPs are the main tenants, although some locate in office buildings. There has been rapid growth in specialists (eye, skin). While some specialists locate in offices in private hospital complexes, a significant number locate in office space within retail centres, or in buildings in or near retail centres.

Medical centres play an important role in generating a steady flow of people to locations, with obvious benefits for retailers, particularly a pharmacy. Medical centres attract all population segments, though the most important customer groups are elderly residents and young children.

Based on demand assumptions – principally population growth - 1,200 m² (GFA) of medical floorspace is supportable at the LTC by 2026. The total supportable floorspace increases to 3,500 m² by 2036, 5,900 m² by 2046 and 8,900 m² by 2056.

5.3.2 Allied Health

Like medical centres, allied health services are playing an increasingly important role in retail centre developments. Allied health services are more specialised than GP services and extend across a range of classifications including (but not limited to) dentistry, physiotherapy, psychology, chiropractic, optical, etc.

Based on demand assumptions, 2,300 m² (GFA) of allied health floorspace is supportable at the LTC by 2026. The total supportable floorspace increases to 6,600 m² by 2036, 10,300 m² by 2046 and 15,300 m² by 2056.

5.3.3 Childcare

With a rapidly increasing population, there is a growing requirement for childcare services within key centres that are proximate to dense population and employment clusters. In part, the level of demand for childcare spaces in the LTC will be impacted by the extent to which families with young children are attracted to apartment living.

Based on demand assumptions, a net 1,200 m² (GFA) of childcare floorspace is supportable in the LTC by 2026. The total supportable floorspace increases to 4,200 m² by 2036, 7,100 m² by 2046 and 10,700 m² by 2056.

5.3.4 Commercial Gymnasiums

Over the several decades the Gyms and Fitness Centres industry has grown strongly. Commercial gyms cater to essentially all population segments and as such play a key role in generating a steady flow of people to new retail centre developments.

Revenues would have been heavily impacted by COVID19 but our assessment looks through that major interruption to a post-COVID normalisation in conditions which is now well under way.

Based on demand assumptions, 300 m² (GFA) of commercial gymnasium floorspace is supportable at the subject site by 2026. The total supportable floorspace increases to 900 m² by 2036, 1,600 m² by 2046 and 2,400 m² by 2056.

5.4 Commercial Office

5.4.1 Financial and Property (F&P)

While a significant number of F&P related jobs are located in the CBD, there are significant numbers of jobs which are located locally and provide services to the local communities in the suburbs. While a proportion of these jobs are working from home (WFH), it generates demand for office space. Some of that demand will be located in business park locations and some – e.g., residential real estate agents and banks - will be located in town or community centres in office space or in retail space along with medical services and retail.

Many of these businesses capture work from proximity to the customers drawn to a major centre, and it is estimated that more than half of those jobs would be located in a major centre such as LTC. The balance would operate in standalone business parks, smaller community centres or operate from home.

Based on demand assumptions, 3,800 m² (GFA) of F&P floorspace is supportable at LTC by 2026. The total supportable floorspace increases to 10,300 m² by 2036, 15,700 m² by 2046 and 23,100 m² by 2056.

5.4.2 Professional Services and Support (PSS)

For a variety of reasons, a significant number of professional jobs - e.g., legal, accounting, computer - are located locally, providing services to the local community and also to businesses operating in the area. This includes admin workers supporting the professionals.

It is estimated that close to half of these jobs would be located in office buildings in a major centre, where the amenity available is valued by the workforce. Some businesses will operate in business parks to be closer and more convenient to the businesses they serve and there are also smaller businesses operating from home.

Based on demand assumptions, a net 2,900 m² (GFA) of PSS floorspace is supportable at LTC by 2026. The total supportable floorspace increases to 7,500 m² by 2036, 11,300 m² by 2046 and 16,500 m² by 2056.

5.4.3 Public Agencies and Social Services (PASS)

State and Federal government agencies – e.g., motor registry, medicare – and publicly funded organisations – e.g., employment agencies - are located locally in major centres or in office buildings very proximate to major centres. providing services to the local community and also to businesses operating in the area. This includes admin workers supporting the professionals. It is estimated that about half of these jobs would be located in office buildings in a major centre.

Based on demand assumptions, 1,600 m² (GFA) of PASS floorspace is supportable at LTC by 2026. The total supportable floorspace increases to 4,200 m² by 2036, 6,200 m² by 2046 and 9,100 m² by 2056.

5.4.4 Education

The bulk of education jobs are located on school sites and campuses, not in town centres. Specialist tutoring businesses and some back-office operations are located in town centres. Increasingly, however, tertiary institutions are locating teaching and research space in town centres, particularly town centres located on train stations, to maximise access by the student population. In the case of LTC, while well located, it is expected that Bradfield City will be favoured by the State Government for a tertiary presence so at this point it is conservatively assumed to not be a major source of demand for office space.

Leppington public school is located within the bounds of the LTC. However, the estimates for floorspace exclude this school and, noting that the draft Camden-Liverpool PP proposes that other schools may be located within the LTC, exclude those future schools. With that caveat, based on demand assumptions, 270 m² (GFA) of floorspace is supportable at LTC by 2026. The total supportable floorspace increases to 650 m² by 2036, 990 m² by 2046 and 1,400 m² by 2056.

5.5 Total floorspace demand

If we summarise demand for retail and commercial floorspace from all the sectors (Table 15), 35,700 m² (GFA) of floorspace is supportable at the LTC by 2026. The total supportable floorspace increases to about 90,000 m² by 2036, to 139,000 m² by 2046 and to about 204,000 m² by 2056.

The proposal to deliver 3,016 m² of retail space on the Residential Core site represents about 3% of the demand projected for 2036. While small, it is appropriate for its location away from the centre. Given the geographic size of the LTC, there is ample scope for developments elsewhere to deliver floorspace to accommodate the balance of potential demand and for the growth expected beyond 2036.

Table 15. Total supportable commercial retail floorspace In Leppington Town Centre, 2021 to 2056

	2021	2026	2031	2036	2041	2046	2051	2056
Retail Supportable Floorspace (m² GFA)								
Food Retail	8,500	12,800	18,600	31,000	41,900	48,400	59,800	71,300
Non-Food Retail	6,500	9,400	13,300	21,500	28,300	32,100	38,800	45,300
Total Retail	15,000	22,200	31,900	52,500	70,200	80,500	98,700	116,600
Non-Retail Supportable Floorspace (m² GFA)								
Medical	700	1,200	1,900	3,500	4,900	5,900	7,400	8,900
Allied Health	1,400	2,300	3,500	6,600	9,000	10,300	12,900	15,300
Childcare	700	1,200	2,100	4,200	6,000	7,100	9,000	10,700
Commercial Gymnasium	200	300	500	900	1,300	1,600	2,000	2,400
Total Non-Retail	3,000	5,000	7,900	15,200	21,200	24,800	31,300	37,300
Office Supportable Floorspace (m² GFA)								
Finance & Property	2,300	3,800	5,700	10,300	13,900	15,700	19,600	23,100
Professional Services	1,800	2,900	4,200	7,500	10,000	11,300	14,000	16,500
Public and Social Services	1,000	1,600	2,300	4,200	5,600	6,200	7,800	9,100
Education	190	270	390	650	860	990	1,230	1,460
Total Office	5,300	8,500	12,600	22,600	30,300	34,200	42,600	50,100
Total Supportable Floorspace (m² GFA)								
Total All	23,300	35,700	52,400	90,300	121,800	139,600	172,600	204,000

Source: Macropplan

6 Conclusion

The future Leppington Town Centre is located on Leppington Station, which was opened in 2015, and is centred on greenfield growth areas to its north and south. This location gives it significant growth potential, which Camden Council has recognised and again recently confirmed its status as a strategic centre,

With the investment in the southwest rail line, earlier expectations for transport-oriented development at both Edmondson Park and Leppington stations may not have been fully realised but with a lag momentum is clearly building. Edmondson Park – always logically the first of the two to develop - has grown well above expectations over 2016-22. As Edmondson Park fills out, that will further shift growth momentum towards LTC. For LTC that will add to the momentum already emerging from the strong growth in the two greenfield areas to its north and south.

At the same time, northwest of LTC is the Aerotropolis and the new WSA airport which is only going to add to the growth momentum. The Aerotropolis is fast shifting from a plan to becoming a reality, with WSA airport and metro line due to open in 2026. The Aerotropolis is expected to generate 74,000 jobs by 2041 and close to 140,000 by 2056 and these workers will generate demand for housing in the LTC.

Reflecting this developing momentum, the population in the Primary Catchment around the LTC is expected to grow from just 11,700 in 2021, to 64,000 in 2036 and 148,000 in 2056, while Camden LGA is projected to grow from 120,000 in 2021 to close to 400,000 by 2056. .

Across Sydney, as with all cities, there is a strong trend towards higher density living, with higher density focussed on transport nodes. In the outer areas such as Camden, low density housing dominates but affordability factors caused by the high cost of land are also driving an emerging trend towards higher density and this can be observed in the trends evident over 2001-21 across the Western Parkland City. In these outer areas, this shift to higher density living is being accommodated by the opportunity presented by new train stations, in this case Leppington.

Over the period 2021-41, to accommodate population growth in Camden about 62,000 new dwellings will be expected to be built. About 12,400 -13,600 of these dwellings are expected to be apartments. Over this same period, the LTC is expected to see demand for 7,600 dwellings including close to 6,000 apartments which would represent a bit less than half the demand across the Camden LGA. That is, the LTC is expected to play a significant role in delivering a more diverse mix of housing to the Camden LGA. The plans for 1266 apartments and 39 townhouses in the Residential Core development within the LTC will play a valuable part in building momentum for that shift that demand and in diversifying the dwelling mix available to the residents of Camden.

The rapid growth of population in its catchments, and stimulated by the population expected to be living in the LTC itself, servicing the needs of this population is going to generate demand for retail and commercial space. It is estimated that by 2036 there will be demand for gross floor area of 90,000 m² for retail and commercial space. For the Residential Core site, the provision of 3,016 m² of floorspace – which would support about 150 retail jobs – will be a modest contribution but one which is appropriate for its location within the LTC.

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8 Appendix

8.1 Catchment Populations

The Primary Catchment is the catchment around a town centre where a high proportion of the retail trade or demand for particular services might be expected to be captured. In secondary markets, located in the primary catchment of competing town centre, a smaller share of the retail trade would expect to be captured.

Figure 2 shows the primary and secondary catchments for the Leppington Town Centre (LTC). For the LTC, in this instance, we observe that businesses in the LTC might be expected to capture a larger share of the trade of the population resident in the LTC given businesses are located within short walking distance.

For non-retail activities, the population in the Primary Catchment has been used. While some business will be generated from the population in the Secondary Catchments, this is largely accounted for in the retention ratios applied to the Primary Catchment.

The following briefly describes the catchment areas around the LTC:

- **Leppington Town Centre** – the Camden and Liverpool Council draft PP define a large precinct for the LTC. However, the commercial/residential focus will be within an 800m radius and is largely encompassed by Byron Road, Ingleburn Road, Dickson Road, and the rail line north of the subject site.
- **Primary sector**: Includes Leppington Town Centre, and includes the suburbs of Rossmore, Leppington on the south side of Bringelly Road and the suburb of Austral and part of West Hoxton on the north side of Bringelly Road. In terms of ASB SA2 areas, it includes large parts of the Austral-Greendale and Catherine Fields-Leppington SA2 areas.

- **Balance of Primary sector:** Primary Sector less Leppington Town Centre
- **Secondary east:** Includes the balance of West Hoxton, along with Hoxton Park, Carnes Hill, Horningsea Park, Prestons, Edmondson Park, Denham Court and Bardia.
- **Secondary southeast:** Extends from the primary sector, south towards Smeaton Grange at Narellan Road, west to Oran Park and east to Camden Valley Way, incorporating Gledswood Hills, Gregory Hills, Varroville, Kearns, Raby, Denham Court and Leppington.
- **Secondary southwest:** Encompasses Oran Park, Catherine Field, Bringelly, and a small portion of south Leppington.
- **Secondary northwest:** Includes Bringelly north of The Northern Road, along with Luddenham and Badgerys Creek, south of Elizabeth Drive.

8.2 Retail and Commercial Metrics

In estimating non-retail and commercial floorspace demand, Macroplan has used metrics which are outlined in the Table below.

Table 16. Assumed Metrics and Ratios for Assessing Floorspace Demand

	Demand Benchmark		Floorspace Benchmark	
Medical	1.8	GP and Specialists per 1,000 people	56.25	GFA per GP
Allied Health	3.25	AH Professional Per 1,000 people	43.8	GFA per AH Professional
Childcare	3.7	Places Per Children 0-4	6.3	GFA per Child
Gymnasium			31	GFA per 1,000 people
Commercial Benchmarks				
Finance and Property	6.2	Jobs per 1,000 people	40	GFA per Worker
Professional, Services & Support Jobs	10.4	Jobs per 1,000 people	25	GFA per Worker
Public Agencies & Social Services Jobs	5.3	Jobs per 1,000 people	30	GFA per Worker
Education	0.4		40	GFA per Worker

Note: Education demand ratio excludes schools.

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