



Boyds Bay

Economic Impact Assessment

26 August 2011

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Introduction

This Economic Impact Assessment (EIA) has been prepared for the Boyds Bay Garden World site, located on Lot 10 DP 1084319 Parkes Drive, Tweed Heads West. On 6 September 2010, a Gateway Determination was granted for Lot 10 DP 1084319 Parkes Drive, Tweed Heads West to be amended in the Tweed Local Environmental Plan (LEP) 2000 to rezone from Rural 1 (a) to 3 (c) Commercial and Trade. Based on the Public Exhibition Draft Tweed LEP 2010, the Zone 3 (c) Commercial and Trade will become Zone B7 Business Park. This report will address the economic issues relating to the establishment a Business Park (B7 Zone) on the subject site.

The B7 Business Park zone is described as follows:

Zone B7 Business Park

1 Objectives of zone

- To provide a range of business, office, and light industrial uses.
- To encourage employment opportunities.
- To enable other land uses that provides facilities or services to meet the day to day needs of workers in the area.
- To provide for bulky goods retailing activities that are controlled by a Development Control Plan that ensures that such uses do not detract from the viability of existing or proposed centres
- To provide for retailing activities that serves the needs of the other businesses in the zone and where such uses are controlled by a Development Control Plan that ensures that such uses do not detract from the viability of existing or proposed centres.

2 Permitted without consent

Environmental facilities; Environmental protection works; Roads

3 Permitted with consent

Passenger transport facilities; Warehouse or distribution centres; Child care centres; Light industries; Neighbourhood shops; Office premises; Bulky goods premises; Garden centres; Hardware and building supplies; Landscaping material supplies; Any other development not specified in item 2 or 4

4 Prohibited

Agriculture; Air transport facilities; Amusement centres; Brothels; Caravan Parks; Cemeteries; Charter and tourism boating facilities; Community facilities; Correctional centres; Crematorium; Entertainment facilities; Exhibition homes; Exhibition villages; Farm Buildings; Forestry; Function centres; Health services facilities; Highway service centres; Home-based child care; Home businesses; Home industries; Home occupations; Home occupation (sex services); Information and education facilities; Marinas; Markets; Moorings; Movable Dwellings; Port facilities; Recreation facilities (major); Recreation facilities (outdoor); Residential accommodation; Restricted premises; Roadside stalls; Rural industries; Rural supplies; Sex services premises; Tourist and visitor accommodation; Water recreation structures; Wholesale supplies

Terms of Reference

The Terms of Reference are as follows:

- Provide a retail and economic needs analysis within which the proposed landuses are justified against the existing supply and demand, location, site suitability and local and regional contexts and hierarchies;
- Provide an assessment of the land use suitability against the principles of the DoP “Integrating Land Use and Transport Policy” “Right Place for Business and Services Planning Policy”.
- Provide an assessment of the impact of the proposed retail / commercial development on established commercial centres in the Tweed, including the suitability of the site to complement existing strategies and not compete with established commercial and retail centres.
- Provide a recommendation on a suite of possible/suitable land uses and a concept plan showing appropriate retail, commercial or industrial zoning.

In line with the above definition the following broad classes of land use will be investigated as part of this assessment:

- Light industry is defined in the Tweed LEP 2000 Public Exhibition Draft Tweed LEP 2010
- Warehouse is defined in the Tweed LEP 2000 Public Exhibition Draft Tweed LEP 2010
- Commercial premises is defined in the Tweed LEP 2000
- Business premises is defined in the Public Exhibition Draft Tweed LEP 2010
- Bulky goods retailing is defined in the Tweed LEP 2000 Public Exhibition Draft Tweed LEP 2010

Retail uses will not be considered in detail as any retail or food services will be scaled to meet the needs of the on-site population and will not materially impact on the regions centre hierarchy.

I Business Park - Practical Description

1.1 The Evolution of Business Parks

A modern business park represents a density and mix of built form to support varied business and industry activities and the employment related to these businesses and industries. Generally a modern business park represents a mix of technical and clean industrial activity as well as traditional office based businesses and industries. This typical mix provides a strong commercial fabric within the precinct and often presents the opportunity for other supplementary/ancillary development and uses such as retail uses, accommodation and corporate business services.

Modern business parks have evolved naturally as a result of changing business needs. Many existing industrial businesses and industries have changed over the past few decades and now rely on much cleaner and technical production which does not require the typical 'tin shed' in a large industrial estate. In addition there are a number of new industries that have evolved and continue to in areas such as information and technology, telecommunications and business services which are also clean, technical industries that do not require a typical industrial location or premises.

In addition to the changing nature of industrial businesses, the location needs of traditional commercial businesses have also changed. Businesses that have always been located in a CBD or major commercial centre are now reconsidering if the extreme density and expensive office space is absolutely necessary. Two decades ago a CBD (or similar) location was often very important for businesses to operate effectively however advances in technology (i.e. internet and email) and more efficient transport (i.e. cheaper airfares) have reduced this need. Many businesses have opted to relocate to business park environment for reasons of cheaper office space, increased amenity and strategic location.

Some of the more significant reasons for the emergence and growth of business park market include the following:

- Access to a large and educated workforce
- Opportunity or desire to diversify the industrial and employment base
- Improved telecommunications and transport infrastructure
- Access to affordable product and provision of alternative product

Common inclusions are:

- 'Clean' light and service industrial uses
- Warehousing and distribution
- Research and development activities
- Commercial office space, either as part of one of the above uses (to allow vertical integration) or as a standalone office building
- Retail and service uses (including food and beverage services) scaled to service the on-site population
- Large Format Retail / Bulky Goods
- Short stay accommodation and other leisure/recreation facilities (located in larger business parks and

related precincts)

1.2 Case Studies

This provides an overview of three of the better known and well established business parks throughout Australia. A mix of business parks has been used to provide an assessment of attributes and characteristics such as location, scale, demand drivers and level of amenity.

Those business parks that will be assessed include the following:

- Norwest Business Park (Sydney)
- Metroplex on Gateway (Brisbane)
- Brindabella Business Park (Canberra)

1.2.1 Norwest Business Park

The Norwest Business Park is a commercial and industrial hub in the heart of Sydney's Hills District, approximately 30 minutes from the Sydney CBD. The business park was developed by Norwest Land and is situated within the Baulkham Hills Shire and covers 377 hectares.

Figure 2.1 Norwest Business Park



The Norwest Business Park has reportedly attracted over 400 corporations to the business park. Norwest provides employment for over 25,000 people and is expected to provide jobs for up to 35,000 people when the business park reaches capacity. This equates to an employment density of approximately 93 employees per Ha. The built form of Norwest Business Park consists of high amenity, multi-level commercial office buildings and a range of industrial spaces supporting a diverse mix of business activity.

Norwest Business Park is home to an array of multinational companies including IBM GSA, Schneider Electric, Inchape Motors, Wyeth Pharmaceuticals, ResMed Inc. and Woolworths Ltd. The Business Park also includes a residential precinct for over 2,000 dwellings, a 22 ha Heritage Park and over 30 ha of open space. It also includes the four-star Crowne Plaza Norwest Sydney Hotel, Norwest Market Town Shopping Centre, the Bella Vista Village Centre, and the future Norbrik Town Centre. The retail facilities located within the development meet the demands of the working population, by providing food and beverage, retail services, and convenience retail facilities, but also meet the demands of the resident population with higher order retail uses. Additional services within the development include medical, banking and child care facilities.

Norwest Business Park has evolved within the Greater Sydney region as an alternate location for commercial office space to the Sydney CBD. Rental rates within the Sydney CBD, over the last ten years, have increased significantly. Commercial office space within the Norwest Business Park is more affordable than that available within the traditional urban centres. The potential also exists for the corporations to establish large scale commercial and industrial facilities proximate to major transportation infrastructure and the Sydney CBD. Norwest is consistent with a recent evolution in the broader Sydney regional office market where business parks are reported as comprising approximately 12% of Sydney's total office supply¹.

The Norwest Business Park is a large scale multi faceted business park which effectively provides opportunity for a diverse range of business uses and therefore provides a broad employment base for residents within the local area(with residential development located within the Norwest precinct) and within the region. The Norwest Business Park functions as a precinct of regional significance supporting large-scale corporate and industrial uses with the inclusion of significant multi-national corporations.

1.2.2 Metroplex on Gateway

Metroplex on Gateway is located within the Australia Trade Coast alongside the Gateway Motorway in Brisbane. The precinct has a total site area of approximately 62 Ha in size and is located approximately 15 minutes from the Brisbane CBD. The precinct accommodates approximately 3,600 employees with a total working population of approximately 5,000 anticipated upon completion. This equates to an employment density of approximately 80 employees per Ha.

Metroplex on Gateway has been developed as a true mixed business park with the development including industrial lots and commercial office space. Current tenants on site include Austral Foods, Fisher & Paykel Australia, Hitachi Construction Machinery (Aus), Johnson & Johnson, Kia Automotive Australia, LG Electronics, Michael Hill Jewellery, Philips Australia, Toshiba, and Volvo Penta. The mix of industrial uses onsite consists of low impact light and general industrial uses. Metroplex on Gateway also contains an ABC Child Care Centre, as well as a mix of food and beverage facilities and service retail which function to meet demand generated by the onsite working population. A hotel and conference centre development is planned within Metroplex on Gateway.

Metroplex on Gateway is a high amenity business park precinct, with the inclusion of parklands, waterways and walking paths throughout the development. The built form of Metroplex on Gateway primarily consists of high amenity, modern industrial and commercial office buildings. Commercial office space is located within the industrial buildings operating as ancillary office space, and the provision of commercial office buildings are also located throughout the precinct.

¹ Jones Land LaSalle (August 2007), Business Parks: The Intelligent Solution of the Future?

Metroplex on Gateway was developed to function in contrast to existing industrial precincts within Brisbane and to offer a high amenity industrial and corporate environment outside of the existing urban centres. Increasing rental rates within the Brisbane CBD forced businesses to look outside of the traditional urban centre for more affordable commercial office space, which Metroplex has been able to provide. This is in addition to increasing strain on transport services and general services and facilities within the CBD and near CBD precincts.

Metroplex on Gateway is well located to offer proximity to the CBD and major transportation infrastructure, whilst also restricting transport and service strains within the CBD. The location of office space is less important for some business types, such as call centres, as increasing rental rates require businesses to find more affordable office space and new technology (such as video conferencing) mean that business functions can occur away from the traditional CBD.

1.2.3 Brindabella Business Park

The Brindabella Business Park is a 28 Ha precinct located adjacent to the Canberra International Airport. The business park comprises approximately 138,000 Sq M of gross lettable area and accommodates a mix of private and public sector tenants from both commercial and industrial industry sectors.

The business park has been developed over the past nine years and is near completion. The business park has been developed not just to appeal to businesses but to the employees of these businesses also by establishing a very high level of amenity throughout the precinct. The inclusion of open space, sports fields, internal transport links, banking facilities, health care facilities, education facilities and a range of food and beverage facilities are all aimed at enhancing the precinct as a desired place to work.

Some of the tenants within the business park include Accenture, AFP Intelligence, Australian Capital Tourism Association, Australian Research Council, British High Commission, Capital Airport Group, Department of Defence, Eccentric Health and Fitness, KPMG, Mediaware International, NEC Australia Pty Ltd, Raytheon Australia and Toll Transitions.

Some of the key advantages of the Brindabella Business Park are the direct access to the airport for logistics businesses as well as those head offices of national and international companies and organisations that benefit from this. The business park is also conveniently located to the CBD and therefore provides an alternative location for businesses that would typically locate in the CBD. And a location within Canberra also provides the opportunity to accommodate organisations such as the Department of Defence (a major tenant within the business park).

1.3 Conclusion

The subject site presents the opportunity to establish a modern business park development that will accommodate the employment needs of local residents as well as the locational and built form needs of local and regional businesses and industries, albeit on a smaller scale than the major business parks assessed as case studies.

The site offers accessibility to major markets in Northern New South Wales and South East Queensland, is proximate to the Gold Coast Airport and is well located on the regional road network.

The subject site is likely to appeal to a mix of businesses and industries and will need to be flexible to accommodate the specific needs of each. This business mix has the potential to diversity the economic base of Tweed Shire.

The small scale of the site (at just over 5Ha) means that the site will not be able to host the range of accommodation and major amenity/service facilities common in the larger business parks. Equally the site is not considered appropriate for a major retail footprint (other than shops and services intended to service the on-site population). Consequently, the major land uses considered appropriate for the site are commercial office, light/service/clean industry (broadly defined) and larger format retail/bulky goods.

2 Regional and Site Assessment

2.1 Introduction

This section provides a regional overview of the Tweed Shire as well as an assessment of the characteristics of the site and surrounding land uses from a market perspective to determine the most relevant locational considerations for the site.

2.2 Tweed Shire

The Tweed Shire covers an area of 1,303 Sq Km with the major centres including Tweed Heads, Murwillumbah, Kingscliff and Cabarita. Tweed Heads is the largest town and is located on the Queensland (QLD) – New South Wales (NSW) border. The city of the Gold Coast is located immediately to the north of Tweed Heads and has a population of over 500,000 people. Currently Tweed Shire has a population of approximately 91,800 people with this projected to increase dramatically over the coming years due to its coastal location and accessibility to the Gold Coast which is a major growth centre in Australia.

Table 1.1 outlines the population projections by Statistical Local Area (SLA) for the Tweed Shire. The Tweed-Pt B SLA is located to the west of the Shire, is predominantly rural in nature and includes townships such as Murwillumbah, Mt Warning, Tyalgum and Eungella. The Tweed-Tweed Coast SLA is located along the coast to the south of the Shire and includes townships such as Bogangar, Hastings Point, Pottsville and Casuarina. The Tweed-Tweed Heads SLA is located along the coast to the north of the Shire and includes townships such as Tweed Heads, Bilambil, Terranora, Banora Point and Kingscliff.

Table 2.1
Population Projections

	2011	2016	2021	2026	2031
Population					
Tweed-Pt B	21,600	22,100	22,600	23,100	23,600
Tweed-Tweed Coast	11,300	13,400	15,500	17,600	19,700
Tweed-Tweed-Heads	58,900	64,800	70,600	76,200	81,500
<i>Tweed Shire</i>	<i>91,800</i>	<i>100,300</i>	<i>108,700</i>	<i>116,900</i>	<i>124,800</i>
Household Size					
Tweed-Pt B	2.54	2.51	2.48	2.45	2.42
Tweed-Tweed Coast	2.52	2.49	2.46	2.43	2.40
Tweed-Tweed-Heads	2.27	2.25	2.22	2.19	2.17
<i>Tweed Shire</i>	<i>2.36</i>	<i>2.34</i>	<i>2.31</i>	<i>2.28</i>	<i>2.25</i>
Households					
Tweed-Pt B	8,499	8,801	9,110	9,424	9,745
Tweed-Tweed Coast	4,480	5,377	6,295	7,235	8,196
Tweed-Tweed-Heads	25,892	28,832	31,794	34,733	37,600
<i>Tweed Shire</i>	<i>38,843</i>	<i>42,955</i>	<i>47,118</i>	<i>51,287</i>	<i>55,418</i>

Source: NSW Planning, 2006 ABS Census, RPS

Based on Table 2.1 the Tweed Shire is forecast to experience growth of 33,000 people, or 35.9% from 2011 to 2031. The SLA that is forecast to experience the most growth is the Tweed-Tweed Coast SLA with

74.3%, followed by the Tweed-Tweed Heads SLA with 38.4% and the Tweed-Pt B SLA with 9.3% over the 20 year period.

Major residential developments to occur within the Tweed Shire and contribute to major population growth include:

- Cobaki Lakes is a master planned community located adjacent to the Queensland / New South Wales border west of the Gold Coast Airport. The State Government approved this residential estate as a major project on 6 December 2010. The 594 Ha estate is expected to house 5,500 dwellings and 12,000 residents and is expected to take 15 years to complete.
- RISE Bilambil Heights is located at the old Terranora Lakes Country Club and received concept plan approval from the State Government on 29 June 2010. The development is to ultimately comprise 1,600 residences, a 200 bed aged care facility and retail and commercial space. This precinct forms part of the overall Bilambil Heights expansion area which is expected to have a population of 10,000 people.

The Far North Coast Regional Strategy 2006-2031 (FNCRS) from the NSW Department of Planning projects the expected characteristics of the Far North NSW Coast; an area which includes the six Local Government Areas (LGAs) of Ballina, Byron, Kyogle, Lismore, Richmond Valley and Tweed for 2031. This document states that due to population growth in this region, suitable employment land needs to be identified to provide additional jobs. It estimates that approximately 156 Ha of additional industrial land will be needed throughout the Far North NSW Coast area over this time.

The current workforce participation rate of the Tweed Shire is approximately 31,500 people or 40% of the population. The Tweed Economic Development Strategy states that it aims to achieve higher workforce participation rates (50%) in the Tweed Shire.

The Tweed Economic Development Strategy also aims to increase the level of employment self containment in the Tweed Shire. This refers to where people who live in Tweed Shire also work in the Tweed Shire. Currently based on ABS Journey to Work data:

- Approximately 17,800 (60.8%) employed residents in the Tweed Shire also work in the Tweed Shire.
- Approximately 5,800 (19.9%) of employed residents in the Tweed Shire work in the Gold Coast to the north.
- The remaining 5,600 (19.4%) employed residents in the Tweed Shire work outside of both the Tweed Shire and the Gold Coast.

Figure 2.1
Tweed Shire Journey to Work Breakdown

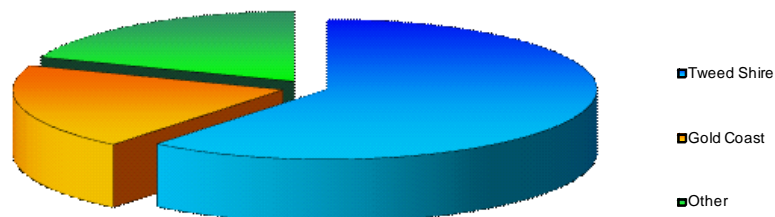


Figure 2.1 provides a breakdown of the journey to work patterns of Tweed Shire residents.

Based on the above figures the employment self containment rate of the Tweed Shire is approximately 60.8%. If the employment self containment rate was to increase to 80% in 2021, the journey to work breakdown of Tweed residents would be expected to comprise:

- 80% of employed residents in the Tweed Shire working locally.
- 10.1% of employed residents in the Tweed Shire working in the Gold Coast.
- 9.9% of employed residents in the Tweed Shire working outside of both the Tweed Shire and the Gold Coast.

By increasing the employment self containment rate to approximately 80% this would also require an increase in the number of jobs offered in the Shire. Based on an existing workforce of 31,500 people in the Tweed Shire, an increase to 50% of the Tweed population being in the workforce in 2021 and an 80% self containment rate, will require approximately 24,000 new local jobs to be created in Tweed Shire by 2021. An additional 7,000 jobs will be required in the period 2021 to 2031.

In broad terms, in order to achieve stated economic development and planning objectives (while also having the environmental and social benefit of reduced journey to work) the numbers of local jobs in Tweed Shire will need to more than double in the period 2006 to 2021 from approximately 19,000 to over 43,000.

2.3 Site Assessment

The subject site covers 5.026 Ha and is located on Lot 10 DP 1084319 Parkes Drive, Tweed Heads West. It is currently occupied by Boyds Bay Garden World.

The subject site is located near the intersection of the Tugun Bypass and the Pacific Highway. There are approximately 35,000 to 40,000 vehicles using the Tugun Bypass everyday with this figure predicted to grow to 60,000 vehicles by 2017. Combined with traffic from the Pacific Highway the amount of traffic past the site is likely to be over 70,000 vehicles per day.

The Tringa Street industrial precinct is located adjacent to the site to the west and is currently undeveloped. The subject site is located proximate to the QLD/NSW border which means that it is well located to service both the southern Gold Coast and northern Tweed Heads markets.

Surrounding land uses include a sewage treatment plant, the Gold Coast Airport to the north and low density residential uses to the south. The site's proximity to the airport will mean that there are certain restrictions regarding the final built form of the development in regards to things such as building height and lighting. The Gold Coast Airport Master Plan 2006 guides the future development of the airport. It aims to support the airport's long term operation in view of its economic, transport, employment and tourism benefits to the Tweed. This includes the development of industrial and employment precincts for aviation as well as non-aviation uses.

The subject site is well placed to provide for uses that relate to the Gold Coast Airport and will enhance the 'brand' of the airport precinct, especially since the airport has limited spare capacity and developable land. It has good services, access and infrastructure and this will improve as heavy/light rail is linked to the Gold

Coast Airport. As such, any employment uses on the site have the added opportunity to capitalise on future development in and around the airport which is an important transportation and employment hub.

Figure 2.2 provides an aerial overview of the subject site and surrounds.

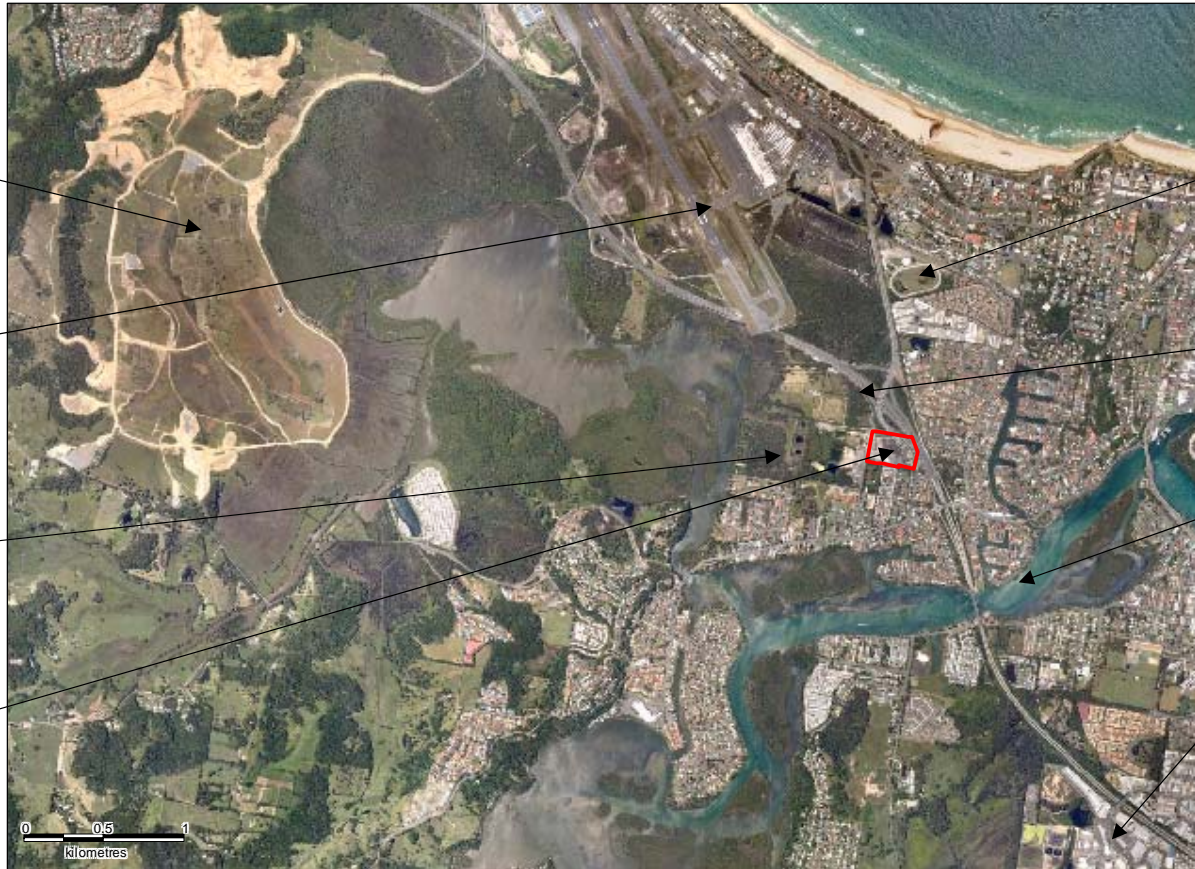
Figure 2.2 Site and Surrounding Land Uses

Cobaki Lakes is a future master planned community that is expected to house 12,000 residents at completion.

Gold Coast Airport is located proximate to the site.

The Tringa Street industrial precinct is located adjacent to the subject site and is currently undeveloped.

The subject site is currently occupied by Boyds Bay Garden World



The Border Park race track has been identified as a designated employment area in the short term in the TUELRs.

The Tweed Heads Bypass connects with the Pacific Highway.

The Tweed River separates the north and south of Tweed Heads.

The bulky goods retail precinct of South Tweed Heads.

2.4 Implications

The Tweed Shire is a rapidly growing area, forecast to increase by 33,000 people over the next 20 years. The development of communities such as Cobaki Lakes and Bilambil Heights will host the majority of this population growth in the urban northern portion of Tweed Shire.

An increasing population will also require an increase in the provision of employment, particularly within the local area. At an 80% self containment rate, the Tweed Shire will require an additional 24,000 jobs in the period to 2021. The increase in workforce participation, from 40% to 50%, coupled with an increased self containment rate (from 60% to 80%) means that the Tweed Shire will need to more than double the local workforce to over 43,000 people by 2021. This creates significant challenges for employment and economic development which will require the maximisation of all available opportunities. Their respective targets of 50% and 80% (whilst considered by some to be push targets) are endorsed by this analysis due to the magnitude of the environmental and social benefits.

The subject site is effectively located on the entrance to Tweed Shire and is part of a broader economic precinct that includes the airport and other industrial/employment nodes. This not only provides cross-border opportunities, it will also allow the site to act as an effective host of the economic, employment and service potential that is attached to both the location and the airport precinct.

Employment density and diversity, such as that offered by the subject site, is required for Tweed Shire to achieve the stated (and desirable) employment and economic development objectives that seek to increase the proportion of local people in work and the amount of those people that work within the shire.

3 Bulky Goods / LFR

3.1 Introduction

This section provides an overview of bulky goods retail within the Tweed Shire. This will include analysis of supply and demand to determine the need for this type of retail on the subject site.

3.2 Bulky Goods Retail

Bulky goods / Large Format Retailers (LFR) cater to an infrequent purchase, with shoppers willing and likely to travel some distance for bulky goods retail operators. Therefore sites with a high degree of accessibility, exposure and consumer recognition are desired. The site for bulky goods retail affects the type of operators that are likely to locate there. Different bulky goods retail operators require different features and characteristics of sites.

A bulky goods retail development will function as a destination retail precinct in competition to, and in concert with, similar precincts in the region. The desire to compare and shop around (particularly where style and fashion is involved) will mean that potential customers may visit many such precincts / retailers on a specialised or irregular basis and may travel for up to one hour (or further in rural areas).

The type of bulky goods retail can be divided into four broad categories and include:

- Service bulky goods retailers which cater to home renovation and trade suppliers such as automotive, electrical, paint, plumbing, timber and other uses. These include operators such as Dulux Paint, Super Cheap Auto, Repco and Home Decorator.
- Secondary bulky goods retailers which are typically located in secondary locations with lower rents and a specialised focus catering to infrequent visits within a localised area. These include operators such as Tile Wizard, Tradelink and Tile Supplies.
- High profile bulky goods retailers which have a broad catchment and include operators such as Harvey Norman, Bunnings and Domayne.
- Super Regional bulky goods retailers such as IKEA who cater to a large regional catchment.

Successful bulky goods retail precincts contain a critical mix and mass of bulky goods retailers. These precincts also generally have a strong anchor tenants. An anchor tenant is a nationally renowned retailer who has the ability to attract patrons from a wide area. Some of these retailers include Bunnings, Harvey Norman, Domayne, Freedom Furniture and JB Hi-Fi. Bulky goods retailers like to locate proximate to these retailers as it allows them to capture trade from patrons who visit these stores.

3.3 Existing Bulky Goods Retail Infrastructure

In Northern NSW and the southern part of the Gold Coast a number of bulky goods retail precincts have been identified. These include Tweed Heads South, Murwillumbah, Lismore, Ballina, Byron Bay, Bundall and Burleigh Heads. A bulky goods retail precinct is one where there are a number of bulky goods retailers located within proximity to each other. A bulky goods retail precinct may have a different focus such as automotive, electronic or furniture.

Table 3.1 provides a description of each identified bulky goods retail precinct.

Table 3.1
Existing Bulky Goods Retail Infrastructure

Precinct	Location	Size	Tenants	Function
Tweed Heads	Situated along Minjungbal Drive and Greenway Drive	Approx. 62,000 Sq M	Tenants include Harvey Norman, Bunnings, Forty Winks, Super Cheap Auto, Barbeques Galore, The Outdoor Furniture Specialists, Repco, Autobarn, Snooze, Beaumont Tiles, Godfreys, Super Amart, The Good Guys, Carpet Court, Clive Anthonys, Retravisio, Dick Smith, BCF, JB Hi-Fi and others	A medium-sized precinct which trades to the southern Gold Coast and Northern NSW market
Murwillumbah	Located in the area surrounded by Wollumbin Street (north) and Wharf Street (south)	Approx. 4,000 Sq M	Tenants include Retravisio, Officeworld, Mitre 10, Repco, Carpet Court and others	Rural bulky goods retail centre that is part of the Murwillumbah township
Lismore	Located inside the CBD (Diadem Street, Conway Street) and the established South Lismore Industrial Precinct (Bruxner Highway)	Approx. 27,000 Sq M	Tenants include Bunnings, Officeworks, Harvey Norman, Retravisio, Dick Smith, Super Cheap Auto, Spotlight, Repco, Barbeques Galore, Autobarn, Betta Electrical and others	Small regional bulky goods retail centre that trades predominantly to Lismore residents and surrounding rural areas
Burleigh Heads	The Burleigh precinct is elongated along Reedy Creek Road, Kortum Drive and Bermuda Street and West Burleigh Road	Approx. 64,000 Sq M	Tenants include Bunnings, Super Cheap Auto, Spotlight, Repco, Beacon Lighting, Autobarn, Beaumont Tiles, Godfreys, BCF, Officeworks, Dick Smith, Carpet Court and others	A medium-sized, regional bulky goods retail area that covers the central-southern Gold Coast market. Focus upon homeware and automotive uses
Bundall	Situated along Bundall Road to the east and Ashmore Road to the south	Approx. 90,000 Sq M	Tenants include Harvey Norman, JB Hi-Fi, Forty Winks, Oz Design Furniture, Barbeques Galore, The Outdoor Furniture Specialists, Bay Leather Republic, Autobarn, Snooze, Plush, Godfreys, Domayne, The Good Guys, Mitre 10 and others	Large regional bulky goods retail centre. Covers the Gold Coast market, with larger stores focused on homewares, electronics and furniture
Byron Bay	Situated mostly to the north-west of the township, along the northern side of Ewingsdale Road	Approx. 4,000 Sq M	Tenants include Byron Bay Furniture, Byron Direct Sport, Fit Sports Power, Repco, Mitre 10 and others	A rural centre that covers the Byron Bay township, without any major name tenants
Ballina	Located in the CBD area between River and Kerr Streets and along Southern Cross Drive in the north	Approx. 40,000 Sq M	Tenants include Bunnings, Super Amart, The Good Guys, Carpet Court, Super Cheap Auto, Barbeques Galore, Repco, Snooze, Beaumont Tiles, Retravisio, Dick Smith and others	Precinct trades to Ballina and surrounding regional area. Largely hardware based

Figure 3.1 illustrates the identified bulky goods retail precincts, while Figure 3.2 illustrates the existing bulky goods retailers within the Tweed Shire.

Figure 3.1 Existing Bulky Goods Retail Precincts

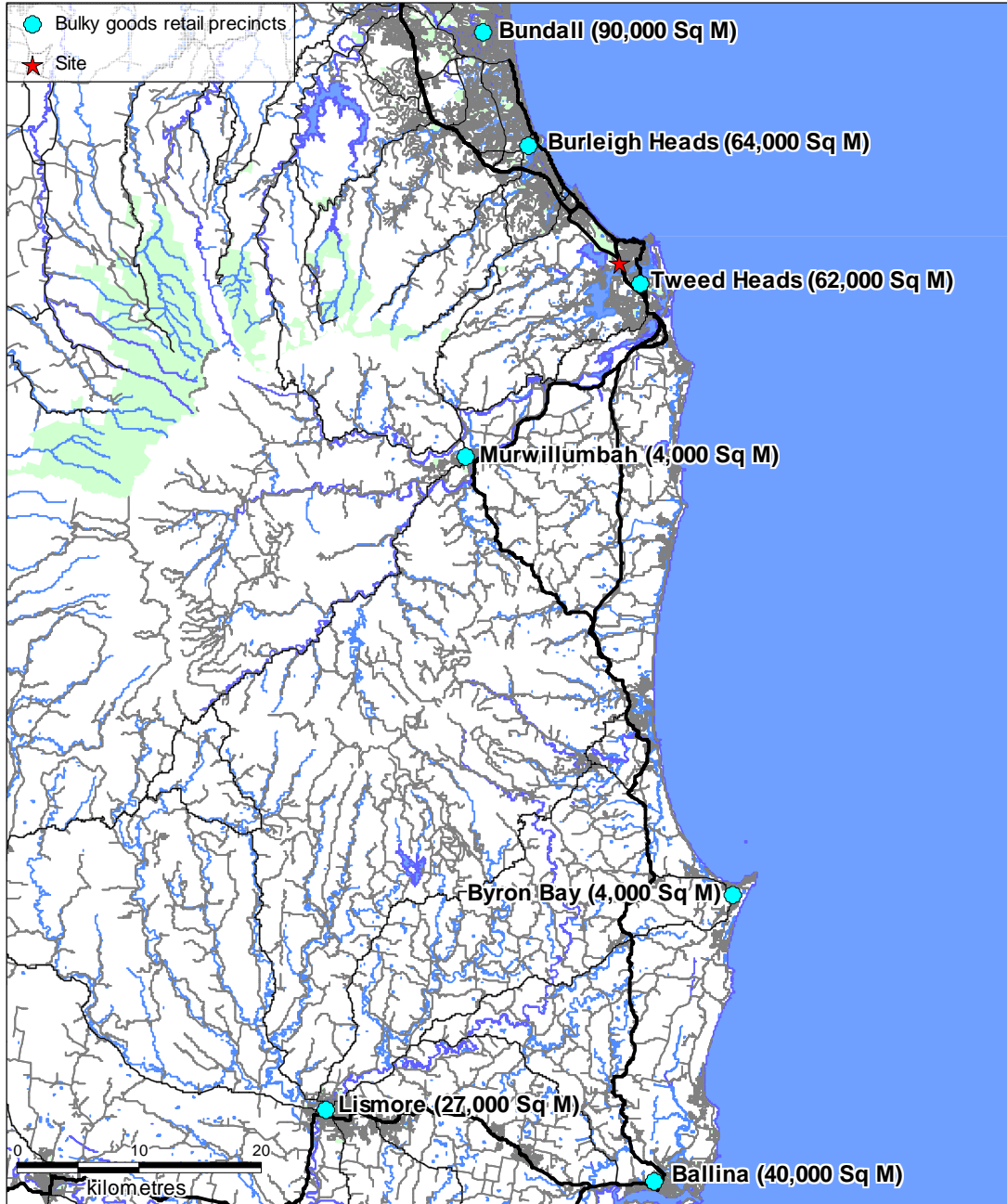
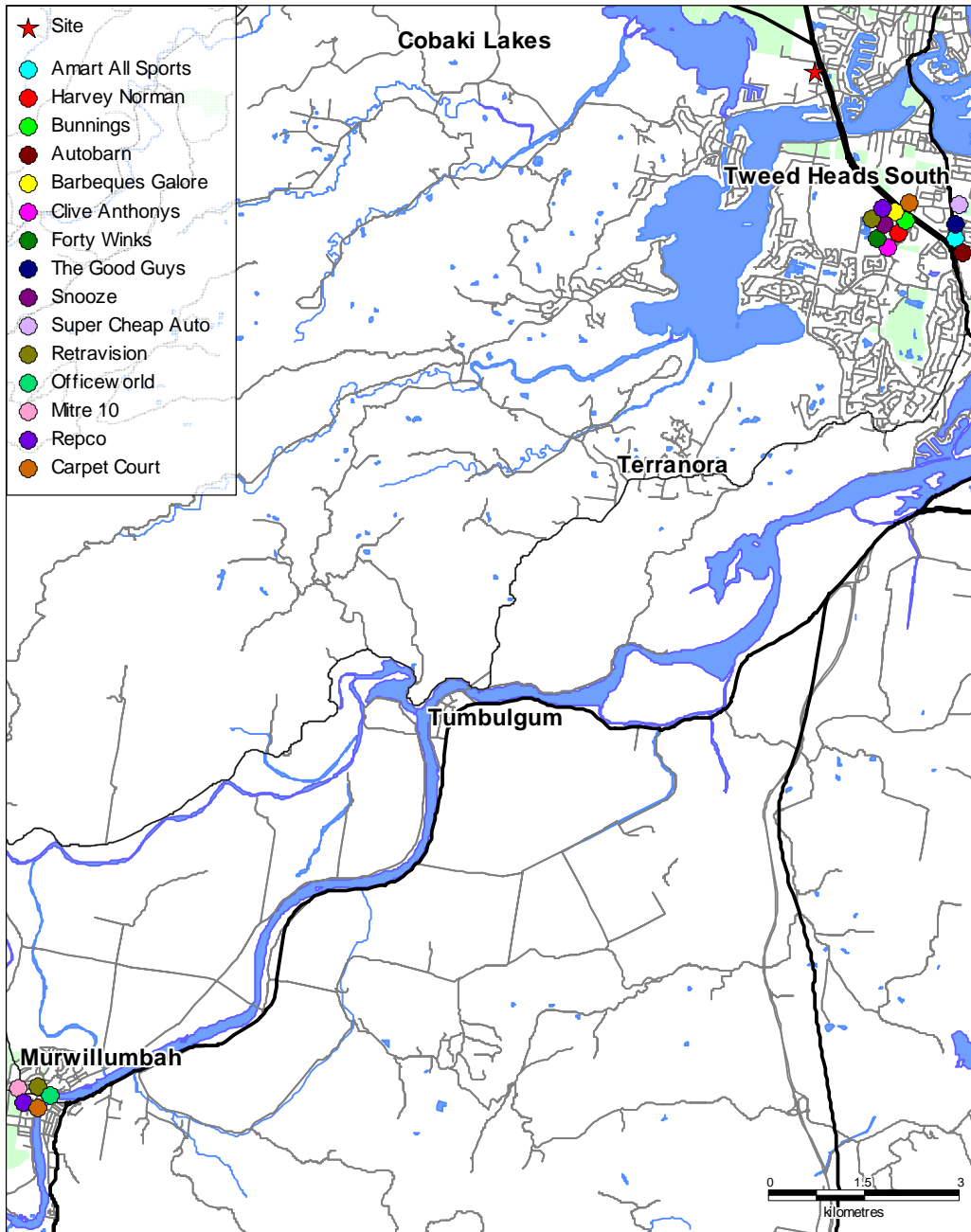


Figure 3.2 Tweed Shire Bulky Goods Retailers



3.4 Planned and Proposed

A search of development applications on Tweed Shire Council's website found a development application lodged on 7 February 2011 for a change of use for bulky goods retailing at 2 Greenway Drive, Tweed Heads South (Lot 2 on DP1046045). Coates Hire proposes to use their existing industrial building for the purposes of bulky goods retailing, whereby the premises will primarily be used for the hire and return of industrial and building equipment, with a portion of the building being used for the maintenance of the machinery. The outcome of this development application has yet to be determined.

It is understood that Tweed Shire Council is in discussions with parties seeking to significantly expand the Minjungbal Drive and Greenway Drive precinct by up to 40,000 Sq M. To date no application has been lodged and the timing (or certainty) of delivery of this expansion cannot be defined.

Outside of the Tweed Shire, Ballina Shire Council has approved a 29,000 Sq M bulky goods retail development along the Pacific Highway in southern Ballina. This will take the total amount of bulky goods retail floorspace in Ballina to approximately 69,000 Sq M.

In addition to this, Ballina Shire Council has rezoned 15.7 Ha of land to support bulky goods retail. This land is located to the north of Ballina's Southern Cross Industrial Estate, and is seen as the next stage of expansion for that particular area.

3.5 Bulky Goods Retail Demand

3.5.1 Current Availability

Table 3.2 outlines the bulky goods retail space that is currently available for sale or lease in the Tweed Shire.

Table 3.2
Bulky Goods Retail Space Currently Available

Address	Suburb	Type	Size (Sq M)	\$/Sq M	\$/p.a.
For Lease					
Machinery Drive	Tweed Heads South	Complex	444	\$175	\$77,700
Minjungbal Drive	Tweed Heads South	Glass front showroom and warehouse	229	\$262	\$60,000
	Tweed Heads South	Showroom/factory/warehouse combination	540	\$56	\$30,000
Minjungbal Drive	Tweed Heads South	Retail showroom	232	\$284	\$66,000
10 Machinery Drive	Tweed Heads South	Showroom that can be split into 2 tenancies	971	\$240	\$233,040
Corner Minjungbal and Machinery Drives	Tweed Heads South	2 storeys	381	\$340	\$129,540

Source: realcommercial.com.au, RPS

Based on a search for bulky goods retail space currently available in the area, no sales were found. A limited amount of space was found for lease, with much of the space available having a dual function of warehouse uses as well as bulky goods retail. This type of space may not suit national bulky goods retailers looking for space with high exposure and accessibility. Of the bulky goods retail space that is available for lease in the Tweed Shire, the median lease price is \$251 per Sq M.

3.5.2 Floorspace Demand

Bulky goods retail uses on the subject site are expected to trade to residents from the whole of Tweed Shire. Based on the NSW Department of Planning population projections, the Tweed Shire is anticipated to increase from 91,800 people in 2011 to 100,300 people in 2016 and 124,800 people in 2031. On average bulky goods retailers capture 20% to 30% of total household retail expenditure. Based on the 2003/04

Australian Bureau of Statistics (ABS) household expenditure survey, and relative to the average income of the Shire, total retail expenditure in the Tweed Shire in 2006 was \$768.2 million. Due to the dispersion of bulky goods retail and the lack of diversity in other forms of retail such as department stores in the Tweed Coast region, it is expected that bulky goods retailers will capture the upper end of this scale to between 25% and 30% with the higher end of this range (30%) more likely.

Bulky goods retail expenditure comprises both household and non-household expenditure. Non-household bulky goods retail expenditure is calculated as an additional 25% of total household expenditure. Table 3.3 shows the estimated average bulky goods retail expenditure and floorspace demand for the Tweed Shire. Table 3.3 also projects the demand for bulky goods retail floorspace in the Tweed Shire over the next 10 years. This is calculated based on a turnover of \$3,000 per Sq M which is considered to reflect the lower rental levels currently being experienced in this sector. It also lists the shortfall (undersupply) of bulky goods retail floorspace in the market. This is based on the current supply of 66,000 Sq M of bulky goods retail floorspace in the Tweed Shire.

**Table 3.3
Average Annual Bulky Goods Retail Expenditure**

Total retail expenditure per household					
		\$22,114			
Forecast Retail Expenditure Potential (\$m)					
	2011	2016	2021	2026	2031
Households	38,843	42,955	47,118	51,287	55,418
Total Retail Expenditure	\$859.0	\$949.9	\$1,042.0	\$1,134.2	\$1,225.5
Bulky Goods Retail Expenditure (\$m)					
30% capture	\$257.69	\$284.97	\$312.59	\$340.25	\$367.66
Non-Household	\$51.54	\$56.99	\$62.52	\$68.05	\$73.53
Total	\$309.23	\$341.96	\$375.10	\$408.30	\$441.19
Bulky Goods Retail Floorspace Demand (Sq M)					
Demand (at 30%)	103,076	113,988	125,035	136,100	147,062
Bulky Goods Retail Floorspace Undersupply (Sq M)					
Shortfall (at 30%)	37,076	47,988	59,035	70,100	81,062

Source: RPS, all figures in December 2010 dollars

There is currently approximately 66,000 Sq M of bulky goods retail floorspace in the Tweed Shire. As stated previously bulky goods retailers in the trade area are expected to capture approximately 30% of total household retail expenditure. Therefore based on the demand in 2011 (103,000 Sq M) for bulky goods retail in the Tweed Shire there is a shortfall of approximately 37,000 Sq M. Assuming no further bulky goods retail developments in the Tweed Shire this shortfall is expected to increase to approximately 48,000 Sq M in 2016, 60,000 Sq M in 2021 and over 80,000 in 2031.

3.6 Implications

Bulky goods retail on the subject site is also considered to be a suitable use based on the site's location adjacent to the intersection of the Pacific Highway and Tugun Bypass, providing it with easy accessibility and a high level of visibility to passing traffic.

While the bulky goods retail offer within the Tweed Shire already comprises the national anchor tenants such as Harvey Norman and Bunnings, there is the opportunity for the site and Shire to attract additional national tenants such as Masters, Freedom and Spotlight, as well as other retailers such as Anaconda, Fantastic Furniture, Officeworks and Petbarn that are presently not located in the area. The subject site will provide the opportunity to attract national anchor tenants to the Tweed Shire that might not otherwise be able to locate in the Shire as a result of the lack of suitable sites currently available for sale or lease.

The Tweed Shire is currently experiencing an undersupply of bulky goods retail floorspace (37,000 Sq M), which is anticipated to increase over the next 10 and 20 years (to 59,000 Sq M in 2021 and 81,000 in 2031). In broad terms this means that the combination of factors including population growth, increasing wealth and a limited selection of retailers means that bulky goods retail within the shire has the capacity to double its floorspace over the next 10 years. It is recognised that this potential will be shaped by a number of external factors including general bulky goods retail trends, the cost of establishing a new outlet, competition and the availability of suitable sites. The provision of bulky goods retail floorspace on the site would help to alleviate some of this undersupply.

While the mooted expansion of the Greenway Drive precinct has the potential to cater to a significantly increased LFR footprint, the timing or certainty of the delivery of new large format retail to the market cannot be guaranteed. Additionally, the scale of demand for LFR floorspace over the next 20 years (an additional 81,000 Sq M) means that it would be prudent of the Tweed Shire to identify another site that can bring some LFR uses to the market in the short term. This will provide local employment opportunities and services to local residents.

Bulky goods retail is recommended as a suitable use to occupy the subject site. Sufficient market demand is present for this use to occupy the entire site.

4 Light Industrial

4.1 Introduction

This section provides an overview of light industrial uses within the Tweed Shire. This will include analysis of supply and demand to determine the need for this type of use on the subject site.

4.2 Light Industrial

Light industrial and warehouse/distribution uses are permitted on the subject site in both the Tweed LEP 2000 and Public Exhibition Draft Tweed LEP 2010. These uses are generally local population serving, “clean” industries such as automotive, office and logistics uses located in tilt-slab sheds, sales yards, distribution centres and showrooms.

All other industrial uses including extractive and offensive or hazardous industries are prohibited to be developed on the subject site. Extractive industry includes the winning or removal of extractive material such as sand, soil, gravel, rock or similar substances that are not minerals. Offensive or hazardous industry requires isolation from other buildings.

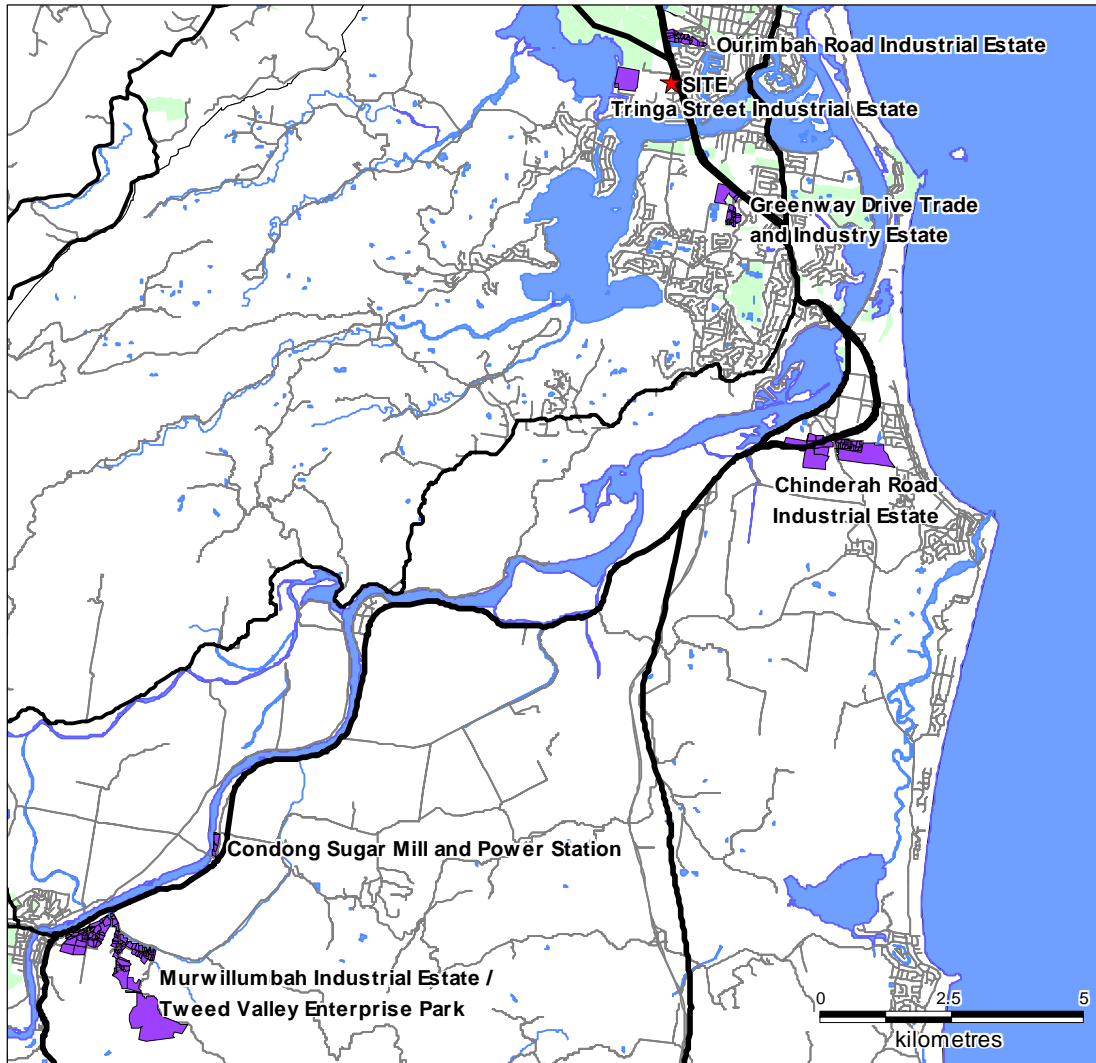
4.3 Existing Industrial Precincts

Based on the Tweed LEP 2000 and the Tweed Shire Urban Land Release Strategy and Employment Lands Strategy (TUELRs) 2009, there are currently six industrial zoned areas located within the Tweed Shire. These include:

- Chinderah Road Industrial Estate, Chinderah
- Greenway Drive Trade and Industry Estate, South Tweed Heads
- Ourimbah Road Industrial Estate, Tweed Heads
- Tringa Street Industrial Estate, West Tweed Heads
- Murwillumbah Industrial Estate/Tweed Valley Enterprise Park, South Murwillumbah
- Condong Sugar Mill and Power Station, Condong

Figure 4.1 illustrates the existing industrial precincts within the Tweed Shire.

Figure 4.1 Existing Industrial Precincts in Tweed Shire



4.4 Industrial Supply

Table 4.1 outlines the industrial supply within the Tweed Shire. This has been derived through, site visits desktop analysis combined with a review of the TUELRs.

Table 4.1
Industrial Land Area by Precinct

	Land Area (Ha)	Occupied Land (Ha)	Vacant Land Raw (Ha)	Vacant Land (Ha)
Chinderah Road Industrial Estate	61.0	8.5	52.5	42.0
Greenway Drive Trade and Industry Estate	13.5	13.5	0.0	0.0
Ourimbah Road Industrial Estate	10.5	10.5	0.0	0.0
Tringa Street Industrial Estate	16.0	0.0	16.0	12.0
Murwillumbah Industrial Estate / Tweed Valley Enterprise Park	126.0	56.0	70.0	48.0
Condong Sugar Mill and Power Station	4.0	4.0	0.0	0.0
Total	231.0	92.5	138.5	102.0

Source: TUELRs, RPS

Based on Table 4.1 there is a total of approximately 231 Ha of industrial land in the Tweed Shire, of which approximately 138.5 Ha is vacant raw land. Approximately 36.5 Ha of this vacant raw land is considered to be constrained land, occupied with uses such as sugar cane, a small quarry and small areas of ecologically sensitive vegetation. It would therefore be difficult to bring much of this land to the market, due to owners not wanting to develop, high infrastructure charges and land being flood prone or good quality agricultural land. Taking constrained land into account, there is approximately 102 Ha of vacant industrial land in the Tweed Shire that can realistically be brought to the market.

4.5 Planned and Proposed

A search of development applications on Tweed Shire Council's website found a development application lodged on 22 October 2010 for a 38 lot industrial subdivision and subdivision works at 92 Wardrop Valley Road, 10 Lundberg Drive, Quarry Road and Wardrop Valley Road, South Murwillumbah (Lot 2 on DP1139059, Lot 1 on DP232745, Lot 17 on DP712954, Lot 228 on DP1122768 and Lot 10 on DP1070301). The outcome of this development application has yet to be determined.

4.6 Tweed Shire Council Industrial Sales

Table 4.2 provides a summary of improved industrial and vacant industrial land sales in the Tweed Shire from 2006 to 2010.

Table 4.2
Tweed Total Industrial Sales

Year	Improved			Vacant Land			Total	
	No	Ha	\$/Sq M	No	Ha	\$/Sq M	No	Ha
2006	24	7.0	\$44	3	1.9	\$165	27	8.9
2007	29	10.7	\$119	1	1.0	\$176	30	11.7
2008	27	7.6	\$47	5	3.1	\$198	32	10.7
2009	14	5.1	\$103	5	1.8	\$144	19	6.9
2010	10	2.7	\$54	4	1.0	\$155	14	3.7
Average 06-10	21	6.6	\$73	4	1.8	\$168	24	8.4

Source: RPS and RPData

Based on the average take up rates from 2006 to 2010, there is an average demand for approximately 1.8 Ha of vacant industrial land per annum, and 6.6 Ha of improved industrial land. The number of sales for improved industrial sites and the total amount of vacant land that has been purchased is considered to be reflective of recent market conditions, such as the tightening of supply as the industrial areas approach capacity. Given the industrial supply constraints for industrial development, it is considered that a high proportion of future 'improved' industrial demand will be from vacant industrial land that has been developed.

4.7 Industrial Demand

4.7.1 Current Availability

Historical Take up Rates

Between 2006 and 2010 there was approximately 8.9 Ha of vacant industrial land sold within the Tweed Shire, this equates to sales rates of approximately 1.8 Ha per annum.

Future Industrial Demand

Future industrial demand can be based on a number of factors. These include:

- **Proportion of the resident population within the workforce**
 - » The current proportion of residents of Tweed within the workforce is 40%. This is lower than the Queensland average of 49% and New South Wales average of 47%. Employment participation in the future is expected to increase to 50% as the increasing population require jobs. Two sensitivities have been investigated including:
 - (a) The current participation rate (40%) continuing.
 - (b) 50%. This indicates that as the population matures the proportion of residents in the labour force in the Tweed Shire is likely to increase. In addition, the Tweed Economic Development Strategy states that it aims to achieve higher workforce participation rates (50%) in the Tweed Shire.

- **Proportion of jobs located within industrial areas**
 - » During 2006, approximately 21% of employment was contained within industrial related trades (e.g. Manufacturing, Electricity/Gas/Water and Waste Services, Construction, Wholesale Trade, Transport/Postal/Warehousing). Three sensitivities have been investigated including:
 - (a) 21% . A continuation of current trends.

- (b) 30%. This is in line with current industrial standards.
- (c) 40% of employment. In order to plan for a flexible, diverse workforce in the future with a diversity of industrial uses such as Mixed Industry and Business Area (MIBA) style industrial developments, an increased level of employment within these areas may be seen during the future.

▪ **Employee density**

- » The current industrial employment density is estimated at 30 employees per Ha. Two sensitivities have been investigated including:
 - (a) 20 employees per Ha.
 - (b) 30 employees per Ha. This represents a higher employment density triggered by more intensive sites.
 - (c) 50 employees per Ha. Employment densities may be expected to increase parallel to the development of more MIBA style industrial development which have more employees per Ha than general industries.

Table 4.3 illustrates the future industrial demand utilising the three factors.

**Table 4.3
Tweed Industrial Demand 2021**

	Scenario 1		Scenario 2		Scenario 3	
2021						
Tweed Population		108,700		108,700		108,700
Employment Participation (% Jobs)	40%	43,480	50%	54,350	50%	54,350
Additional Total Jobs (Current 22,280 jobs)		21,200		32,070		32,070
Local Jobs - Rate	60%	12,720	80%	25,656	80%	25,656
Proportion of Industrial Employment (%:Jobs)	21%	2,671	30%	7,697	40%	10,262
Employees per Ha	20		30		50	
Land Required (Ha)		134		257		205
Annual Demand (2006 to 2021)		8.9		17.1		13.7
Current Industrial Land Identified Constraint Free		102		102		102
Total Additional Land Required (Ha)		32		155		103

Source: RPS

The three scenarios contained in Table 4.3 confirmed both the current take-up rate of 8 ha per year and the need to double this rate if the higher employment targets are to be achieved. A continuation of the current employment characteristics will require an additional 32 ha of industrial land to be identified in the Shire by 2021. If the employment characteristics are to achieve the stated rates an additional 155 ha of land will need to be identified in this time.

Based on Table 4.3, the Tweed Shire requires between 134 Ha and 257 Ha of future industrial land between 2006 and 2021. This equates to an average of between 9 Ha and 17 Ha per year.

The market characteristics of the available industrial land will play a significant role in the actual take-up rates of industrial and. The Tweed Valley Enterprise Park has a significant amount of a viable industrial land that has not been popular with the market. While this can be attributed in part to the global financial crisis, it is considered that a large industrial estate, catering to large land requirements and located in a difficult to access precinct outside of Murwillumbah does not meet the needs of the majority of the market. A very likely scenario is that this land will display a low rate of sale, take-up and development while other employment/industrial precincts (catering to small business and located closer to population centres) will continue to be in short supply.

Based on 102 Ha of constraint free vacant industrial land, this equates to between 6 and 10 years of industrial supply in the Tweed Shire. This is less than the 10 years supply outlined in the 2009 TUERLS. RPS considers that there should be 10 to 20 years of constraint free industrial land available in order to provide a sufficient balance between supply and demand which limits the opportunity for a contracting market that is supply constrained. The provision of industrial uses on the subject site will provide additional constraint free supply to the Tweed industrial market.

The inclusion of the subject site in an industrial/employment precinct that is able to host a range of light industries, service industries and related and allied uses (such as storage, distribution etc) is considered justified and warranted on the basis of the following:

- a demonstrated shortfall of 32 ha of industrial land in the Shire assuming a continuation of current employment trends and that all current constraint free land (including the Tweed Valley Enterprise Park) is consumed in the period to 2021.
- A demonstrated shortfall of 155 ha in the period to 2021 assuming stated employment participation rates are achieved and more jobs are hosted within the Shire. This option achieves desired environmental and social outcomes.
- The inclusion of the subject site, which is located in a broader employment precinct including the airport, will provide a diversity of industrial land to the market and maximise the opportunities available to the airport precinct.
- Recognition that a single large industrial estate located at Murwillumbah while desirable and necessary is insufficient to cater to the diverse employment that will be required by a growing Tweed Shire.

In summary, Tweed Shire needs to identify more industrial land that provides a greater diversity to host a broader range of employment and meet the needs of business and industry. It is recognised that the provision of suitable land will be only part of the equation in achieving target employment outcomes and that suitable employment and economic development strategies need to be in place to attract business and investment.

Clean industrial is recommended as a suitable use to occupy the subject site. Sufficient need and demand is present for this use to occupy the entire site.

5 Office Space and Employment

5.1 Commercial Office Space

The issue generally attached to business parks or MIBA development is the amount of commercial office space. An excess of inappropriate commercial office has the potential to undermine the role of the designated centres in the community. In the case of Tweed Shire it is desirable that major commercial uses be located within existing centres such as Tweed Heads or South Tweed. As an example, if completely developed for commercial office space the subject site, at 5 ha, has the potential to host between 200,000 Sq M and to 300,000 Sq M of floor space. This is between four and six times the estimated amount of floorspace that is present in the major centres of Tweed Shire. On this basis an entirely commercial outcome for the site is considered inappropriate.

Limiting the ancillary floorspace to an amount not exceeding 20% of the total floorspace of the business park will both facilitate a business park outcome (at a high employment density) and will serve to cater to businesses and industries requiring a site that can host a vertically integrated operation.

5.2 Employment Assessment

A business park will have twice the employment density of a light industrial precinct. Employment rates of between 50 and 80 employees per hectare are typical as opposed to 25 to 40 employees per hectare for light and service industrial precincts. Consequently, the site has the capacity to host up to 400 employees if entirely developed for business park uses. Whilst this is only a small portion of the 24,000 additional local jobs required by 2021 it will service to highlight the capacity and diversity of Tweed Shire to host employment.

5.3 Implications

The subject site is suited for a business park use as it is located in the broader airport precinct and is proximate to both transport and a sizeable local population. The controlling mechanism for this type of use given the proposed signing is assessed as being limiting the degree of commercial office place that can be established in addition to the broader range of light and service industrial uses. Limiting the office use to 20% is considered appropriate as it will facilitate the establishment of business park uses while restricting the development of major commercial office buildings away from designated centres.

6 Recommendations

6.1 Introduction

This section will provide recommendations on the appropriate uses for the subject site. These recommendations stem from market and demand analysis that has been conducted with respect to the proposed Business Park (B7) zone.

6.2 Recommendations

RPS recommends that the site can be developed in accordance with the Business Park (B7) zone. Included land uses are:

- Light and service industry including related and allied uses such as storage and distribution
- Bulky goods retail (provided this component is in the order of 50% of the site in order to provide a balanced outcome that includes bulky goods and other employment generating uses)
- Commercial office (provided this component does not exceed 20% of the total floorspace)
- A small amount convenience retail and food and beverage services to service the on-site population

These recommendations are shaped by the undersupply of bulky goods retail and industrial land, the opportunities proved by the site and the need to diversify the economic and employment base of Tweed Shire.

Retail (other than that serving the immediate needs of the on-site population) and other centre based uses not herein discussed should be excluded from this site. These uses include commercial office in excess of 20% of the site and retail uses (supermarkets, comparison shopping etc).

6.3 Economic Assessment

The recommended mix of uses on the subject site will result in a number of economic benefits for the Tweed Shire and local community. One of the major economic benefits of the development will be employment generation.

- A bulky goods retail precinct that occupies 50% of the site would generate an estimated 150 to 220 EFT (equivalent full-time) jobs
- The remainder of the Business Park occupied by commercial, industrial and warehouse uses would generate an estimated 200 to 250 EFT (equivalent full-time) jobs
- The site would also generate between 300 and 400 EFT jobs during the construction phase

While the likely on-site land use mix will provide 350 EFT to 470 EFT jobs on site once completed, this only represents a small amount (approximately 1.5% to 2.0%) of the required 24,000 local jobs needed in the Tweed Shire to 2021. While the site is a vital development in helping to achieve this jobs goal, it represents only a small solution of a much larger employment creation equation.

6.4 Community Benefit Assessment

The following table addresses the recommended uses net community benefit against that of the criteria set out by the NSW government's 'Right Place for Business and Services Planning Policy'. The major land uses contained within the Business Park (B7) zone have been separately assessed to provide a clear picture of the level of community benefit.

Table 6.1
Compliance with Net Community Benefit Assessment Criteria

Criteria	Bulky Goods Retail	Light Industrial (and related)	Commercial Office (as part of Business Park)
The degree to which the policy (Right Place for Business and Services Planning) and its objectives can be satisfied	The inclusion of bulky goods retail on the subject site will not undermine any established or proposed centres in Tweed Shire. As anticipated by the proposed zoning the site is an appropriate location for this type of land use.	The subject site is designated as a future employment area under the UELRS. This use will not undermine any established or proposed centres in Tweed Shire.	Limiting the commercial office space to 20% of the total floorspace will attract appropriate business park uses. This use will not undermine any established or proposed centre in Tweed Shire
The proposed level of accessibility to the catchment of the development by public transport, walking and cycling	The site has the capacity to be serviced by public transport. As a car-based activity, this use does not benefit from cycle or walking access.	The site has the capacity to be serviced by public transport. Residents who live in close proximity to the site will have the capacity to walk or cycle to work.	The site has the capacity to be serviced by public transport. Residents who live in close proximity to the site will have the capacity to walk or cycle to work.
The likely effect on trip patterns, travel demand and car use	Additional employment uses within the Tweed Shire provide the opportunity to reduce journey to work travel times as well as increase employment self containment levels. This will in turn reduce residents' travel outside of the local area for employment and could potentially lead to an additional \$198,000 to \$234,000 being spent in local retail and commercial centres due to savings associated with reduced travel time.	Additional employment uses within the Tweed Shire provide the opportunity to reduce journey to work travel times as well as increase employment self containment levels. This will in turn reduce residents' travel outside of the local area for employment and could potentially lead to an additional \$198,000 to \$234,000 being spent in local retail and commercial centres due to savings associated with reduced travel time.	Additional employment uses within the Tweed Shire provide the opportunity to reduce journey to work travel times as well as increase employment self containment levels. This will in turn reduce residents' travel outside of the local area for employment and could potentially lead to an additional \$198,000 to \$234,000 being spent in local retail and commercial centres due to savings associated with reduced travel time.

Criteria	Bulky Goods Retail	Light Industrial (and related)	Commercial Office (as part of Business Park)
The likely impact on the economic performance and viability of existing centres (including the confidence of future investment in centres and the likely effects of any oversupply in commercial office space on centres)	<p>The recommended bulky goods retail use will not affect the viability or economic performance of existing or proposed centres in Tweed Shire.</p> <p>Long term demand is sufficient to support the subject site and any mooted (but uncertain) expansion of the Greenway Drive precinct.</p> <p>It will serve to attract investment to the region that will positively impact established centres and will not lead to any oversupply of commercial office space.</p>	<p>The recommended light industry will not affect the viability or economic performance of existing or proposed centres in Tweed Shire.</p> <p>It will serve to attract investment to the region that will positively impact established centres and will not lead to any oversupply of commercial office space.</p>	<p>The recommended commercial office (as part of a business park) will not affect the viability or economic performance of existing or proposed centres in Tweed Shire.</p> <p>It will serve to attract investment to the region that will positively impact established centres and will not lead to any oversupply of commercial office space. The commercial office space contained within the business park will serve a distinct function when compared to office users that will locate within designated centres.</p>
The amount of use of public infrastructure and facilities in centres, and the direct and indirect cost of the proposal to the public sector.	<p>There will be no anticipated direct or indirect cost to the public sector from the recommended development. Rather it will provide direct benefits to the local community through:</p> <ul style="list-style-type: none"> ▪ Increasing employment levels through both the construction and operational phases of the development ▪ Increase employment self containment levels 	<p>There will be no anticipated direct or indirect cost to the public sector from the recommended development. Rather it will provide direct benefits to the local community through:</p> <ul style="list-style-type: none"> ▪ Increasing employment levels through both the construction and operational phases of the development ▪ Increase employment self containment levels 	<p>There will be no anticipated direct or indirect cost to the public sector from the recommended development. Rather it will provide direct benefits to the local community through:</p> <ul style="list-style-type: none"> ▪ Increasing employment levels through both the construction and operational phases of the development ▪ Increase employment self containment levels
The practicality of alternative locations, which may better achieve the outcomes the policy is seeking	<p>The subject site is considered to be suitable for bulky goods retail uses based on the site's location adjacent to the intersection of the Pacific Highway and Tugun Bypass, providing it with easy accessibility and a high level of visibility to passing traffic.</p> <p>Long term demand is sufficient to support the subject site and any mooted (but uncertain) expansion of the Greenway Drive precinct.</p> <p>The site will provide the opportunity to attract national anchor tenants to the Tweed Shire that might not otherwise be able to locate in the Shire as a result of the lack of suitable sites available for sale or lease.</p>	<p>Other locations throughout the Tweed Shire have also been identified for potential employment lands along with the subject site. All these sites (and more) are required to make employment demands of the shire. The proposed employment uses on the site are reasonable from a first principles perspective and will also help to cater to the additional demand for approximately 24,000 local jobs which are required in the Tweed Shire to 2021.</p>	<p>Other locations throughout the Tweed Shire have also been identified for potential employment lands along with the subject site. All these sites (and more) are required to make employment demands of the shire. The proposed employment uses on the site are reasonable from a first principles perspective and will also help to cater to the additional demand for approximately 24,000 local jobs which are required in the Tweed Shire to 2021.</p>

Criteria	Bulky Goods Retail	Light Industrial (and related)	Commercial Office (as part of Business Park)
The ability of the proposal to adapt its format or design to more likely secure a site within or adjoining a centre or in a better location	<p>No suitable sites are currently available within or adjoining existing designated centres in the urban northern portion of Tweed Shire. The subject site is a suitable location due to its regional Road accessibility and proximity to the airport.</p> <p>Long term demand is sufficient to support the subject site and any mooted (but uncertain) expansion of the Greenway Drive precinct.</p>	No suitable sites are available within or adjoining existing designated centres in the urban northern portion of Tweed Shire. The subject site is a suitable location due to its regional Road accessibility and proximity to the airport.	No suitable sites are available within or adjoining existing designated centres in the urban northern portion of Tweed Shire. The subject site is a suitable location due to its regional Road accessibility and proximity to the airport.

Therefore the recommended development on the subject site will benefit the community in accordance with the Right Place for Business policy as well as provide part of the jobs required for a region with a growing population.

6.5 Tweed Retail Strategy

In September 2005 RPS (formerly Core Economics) produced the Retail Strategy for Tweed Shire. This concluded 2 years of work that focused on the key questions of the scale of new centres and how to integrate new development into existing communities in a manner that was socially and economically sustainable.

In consideration of the Tweed Retail Strategy in November 2005 [at Council meeting 16 November 2005], the Tweed Shire Council had a number of resolutions. These are:

1. "The character of existing towns and villages and the retail facilities they already have be protected.
2. Where appropriate, Council will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those existing centres, rather than building new ones.
3. Reinforce Tweed Heads South as the major district retail centre by encouraging the expansion and when Tweed's population demands that increased range and level of shopping.
4. Maintain and wherever possible enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style.
5. Limit the scale of new large scale retail centres in the coastal region to a level which caters for the majority of chore type shopping needs. This concept to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking and cycling.
6. Council does not support the establishment of another district retail shopping centre.
7. The retail concepts in these recommendations form the basis of locality plans in the Shire and any retail development applications which are submitted in the interim of these locality plans being prepared and approved by Council be assessed so that the above retail strategies are supported and not compromised."

How the proposed uses 'fit' the adopted strategies resolutions is described as follows in the table below:

Item	Recommended Uses
The character of existing towns and villages and also retail facilities have to be protected;	The inclusion of bulky goods retail on the subject site will not affect the character of existing towns and villages. Additional bulky goods retail sites are required in Tweed Shire as the growing population is expected to double the demand for these uses over the next 20 years and existing precincts (notably Greenway Drive) are nearing capacity.
Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones;	Bulky goods retail on the subject site will not threaten or fracture the viability of existing centres. As car based uses, bulky goods retail does not add to the value of centres in terms of urban design, activity or walkability. They are best located in a fringe or frame location, however this is not possible in Tweed Shire as no suitable sites currently exist. Consequently, this site is considered a suitable location for these uses.
Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping;	This item relates to retail floor space and not bulky goods retail floorspace. The inclusion of bulky goods retail floorspace on the subject site will not impact on the role of Tweed heads South as the major district retail centre.
Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style;	The inclusion of bulky goods retail on the subject site will not affect the appeal or character of Murwillumbah and other village centres.
Limit the scale of new large-scale retail centres in the coastal region to a level which caters for the majority of chore-type shopping needs. This concept is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking;	This item relates to retail centres in the coastal area of Tweed Shire and is not applicable for the assessment of bulky goods retail.
Council does not support the establishment of another district retail shopping centre.	This item relates to retail centres in the coastal area of Tweed Shire and is not applicable for the assessment of bulky goods retail.

As demonstrated in section 3, there is significant existing and future demand of the bulky goods retail floorspace in Tweed Shire. The current undersupply of 37,000 Sq M is expected to expand to 60,000 Sq M by 2021, primarily in line with population growth. The existing major precinct at Machinery and Greenway Drives is effectively at capacity with no certainty of expansion.

A bulky goods precinct on this site would not affect the capacity of any existing or proposed centre in Tweed Shire to attract investment, employment opportunities or retail tenants. Consequently, it would have a negligible impact on the centres.

6.6 Conclusion

The subject site is well located to host a Business Park that includes bulky goods retail, light/service industry and commercial office. Any of these uses could inhabit or all part of the site with no material impact on other precincts.

Tweed Shire has a growing population and limited employment base. This is reflected in the low level of job participation and the numbers of people that leave the Shire each day to work. It is the intention of the

planning and economic development policies to enhance local employment participation and increase the proportion of people who work locally. These policies will require an additional 155 ha of employment and industrial land to be identified within Tweed Shire by 2021. The subject site will form part of the solution for more industrial and employment land and this site will provide part of the scale and diversity required in the Shire to attract the required jobs.

The main supply of industrial land within Tweed Shire is the Tweed Valley Enterprise Park. This park provides large sites for major uses and it is important to recognise that additional industrial/employment land is required that can service a different market niche as well as being better located in relationship to the majority of the population. The subject site will contribute to this diversity and has the potential to leverage the benefit provided by a gateway location and proximity to the airport.

In terms of end users, the subject site could be occupied by any of the appropriate land uses that are light or service industry in nature. In addition to purely industrial and allied uses, the subject site has the potential to host a business park use that combines a maximum 20% commercial floorspace with related light and service industrial uses. It is important that the commercial office space not exceed 20% of the total floorspace so as not to erode the role and function of the designated centres within the Shire.

In addition to the industrial and employment uses, the site is also suitable for bulky goods retail uses as there is a significant shortfall of this form of retail in Tweed Shire. Further, the near capacity of the Machinery and Greenway Drive precincts means that a new bulky goods retail precinct(s) needs to be identified within the Shire. The subject site has the potential to host part of the anticipated demand of 60,000 Sq M to 2021.

RPS recommends that the site can be developed in accordance with the Business Park (B7) zone. Included land uses are:

- Light and service industry including related and allied uses such as storage and distribution
- Bulky goods retail (provided this component is in the order of 50% of the site in order to provide a balanced outcome that includes bulky goods and other employment generating uses)
- Commercial office (provided this component does not exceed 20% of the total floorspace)
- A small amount convenience retail and food and beverage services to service the on-site population

Assumptions

This report has been prepared on the instructions of the stated party and is intended to address the issues as defined in the methodology. The data, analysis and findings contained in this report are, therefore, not appropriate for use in any other circumstance. The report contains a series of projections and forecasts, which have been prepared on the basis of the best available information. Due to the dynamic nature of many of these issues and the number of variables involved, RPS can give no guarantee that these projections and forecasts will be realised.

Documents issued electronically are susceptible to being altered. Therefore, only versions held and issued by RPS can be used as an acceptable reference or source of information.

Appendix A
Demographic Profile

Demographic Profile	Tweed		Tweed-Pt B		Tweed-Tweed Coast		Tweed-Tweed Heads	
Total Persons	79,322		19,972		8,899		50,455	
Age								
0 to 4	4,226	5.3%	1,160	5.8%	590	6.6%	2,476	4.9%
5 to 14	10,388	13.1%	2,968	14.9%	1,421	16.0%	5,995	11.9%
15 to 19	5,085	6.4%	1,525	7.6%	596	6.7%	2,965	5.9%
20 to 24	3,414	4.3%	857	4.3%	349	3.9%	2,206	4.4%
25 to 34	7,080	8.9%	1,705	8.5%	944	10.6%	4,429	8.8%
35 to 44	10,106	12.7%	2,845	14.2%	1,359	15.3%	5,907	11.7%
45 to 54	11,362	14.3%	3,543	17.7%	1,306	14.7%	6,508	12.9%
55 to 64	10,059	12.7%	2,445	12.2%	1,001	11.2%	6,608	13.1%
65 to 74	8,786	11.1%	1,516	7.6%	798	9.0%	6,476	12.8%
75 to 84	6,831	8.6%	1,021	5.1%	448	5.0%	5,370	10.6%
85 years and over	1,984	2.5%	386	1.9%	86	1.0%	1,514	3.0%
Marital Status - Persons								
Married	32,273	49.9%	7,683	48.5%	3,525	51.2%	21,064	50.2%
Separated	2,276	3.5%	544	3.4%	262	3.8%	1,463	3.5%
Divorced	7,101	11.0%	1,653	10.4%	734	10.7%	4,717	11.2%
Widowed	5,351	8.3%	992	6.3%	342	5.0%	4,018	9.6%
Never Married	17,709	27.4%	4,970	31.4%	2,021	29.4%	10,721	25.5%
Total	64,710	100.0%	15,842	100.0%	6,884	100.0%	41,983	100.0%
Language Spoken at Home								
English Only	72,682	96.7%	18,254	96.4%	8,396	97.7%	46,035	96.6%
Other	2,478	3.3%	674	3.6%	201	2.3%	1,599	3.4%
Total	75,160	100.0%	18,928	100.0%	8,597	100.0%	47,634	100.0%
Relationship in Household								
Husband or wife in registered marriage	29,482	40.0%	7,002	37.8%	3,247	38.4%	19,233	41.1%
Partner in de facto marriage	5,204	7.1%	1,439	7.8%	672	8.0%	3,089	6.6%
Lone parent	3,969	5.4%	1,051	5.7%	490	5.8%	2,431	5.2%
Child under 15	13,630	18.5%	3,866	20.9%	1,929	22.8%	7,836	16.8%
Dependent student (15-24)	3,075	4.2%	979	5.3%	364	4.3%	1,730	3.7%
Non-dependent child	4,088	5.5%	1,139	6.1%	377	4.5%	2,570	5.5%
Other related individual	1,249	1.7%	291	1.6%	136	1.6%	819	1.8%
Unrelated individ living in family h/h	756	1.0%	194	1.0%	66	0.8%	497	1.1%
Group household member	2,024	2.7%	340	1.8%	209	2.5%	1,472	3.1%
Lone person	8,633	11.7%	1,790	9.7%	759	9.0%	6,087	13.0%
Visitor (from within Australia)	1,641	2.2%	442	2.4%	197	2.3%	1,004	2.1%
Total	73,751	100.0%	18,533	100.0%	8,446	100.0%	46,768	100.0%
Household Structure								
Couple with no children	9,931	45.3%	2,074	38.2%	1,025	40.8%	6,836	48.9%
Couple famiy with children	7,768	35.4%	2,254	41.5%	972	38.7%	4,546	32.5%
One parent family	3,968	18.1%	1,048	19.3%	490	19.5%	2,432	17.4%
Other family	247	1.1%	50	0.9%	23	0.9%	172	1.2%
Total	21,914	100.0%	5,426	100.0%	2,510	100.0%	13,986	100.0%
Internet Connection								
None	13,144	42.2%	2,800	38.6%	1,260	37.8%	9,083	44.3%
Broadband or Dial up	16,730	53.8%	4,186	57.7%	1,962	58.8%	10,581	51.6%
Not Stated	1,247	4.0%	274	3.8%	113	3.4%	860	4.2%
Total	31,121	100.0%	7,260	100.0%	3,335	100.0%	20,524	100.0%

Demographic Profile	Tweed		Tweed-Pt B		Tweed-Tweed Coast		Tweed-Tweed Heads	
Dwelling Type								
Separate house	20,362	65.4%	6,475	89.2%	2,292	68.7%	11,600	56.5%
Semi-detached and townhouse	5,836	18.8%	317	4.4%	598	17.9%	4,921	24.0%
Flat, unit, apartment	3,320	10.7%	333	4.6%	196	5.9%	2,788	13.6%
Other dwelling	1,575	5.1%	133	1.8%	248	7.4%	1,198	5.8%
Not stated	28	0.1%	3	0.0%	0	0.0%	19	0.1%
Total	31,121	100.0%	7,261	100.0%	3,334	100.0%	20,526	100.0%
Persons per Household								
Separate house	2.69		2.68		2.80		2.67	
Semi-detached and townhouse	1.94		1.61		2.11		1.94	
Flat, unit, apartment	1.73		1.61		2.05		1.72	
Other dwelling: Total	0.00		1.78		1.71		1.56	
Not stated	0.00		4.33		#DIV/0!		2.21	
Total	2.39		2.57		2.55		2.30	
Dwelling Ownership								
Fully owned	13,383	43.0%	2,962	40.8%	1,197	35.9%	9,226	44.9%
Being purchased directly	8,075	25.9%	2,283	31.4%	894	26.8%	4,898	23.9%
Rented	8,298	26.7%	1,694	23.3%	1,134	34.0%	5,467	26.6%
Other Tenure	260	0.8%	70	1.0%	21	0.6%	174	0.8%
Not Stated	1,104	3.5%	253	3.5%	89	2.7%	761	3.7%
Total	31,120	100.0%	7,262	100.0%	3,335	100.0%	20,526	100.0%
Monthly Housing Loan Repayments								
Average Repayment - Sept 2006 \$	\$1,416		\$1,275		\$1,480		\$1,470	
Average Repayment - Current \$	\$1,618		\$1,449		\$1,666		\$1,654	
Weekly Rent								
Average Rent - Sept 2006 \$	\$213		\$174		\$239		\$220	
Average Rent - Current \$	\$244		\$198		\$269		\$248	
Employment								
Employed - Full-time	16,448	52.2%	4,385	51.3%	2,000	53.3%	10,063	52.4%
Employed - Part-time	10,803	34.3%	2,935	34.3%	1,260	33.6%	6,611	34.4%
Employed - Away From Work	2,006	6.4%	554	6.5%	225	6.0%	1,224	6.4%
Employed - Total	29,258	92.9%	7,875	92.2%	3,486	93.0%	17,899	93.2%
Unemployed	2,240	7.1%	671	7.9%	264	7.0%	1,304	6.8%
Total labour force	31,497	100.0%	8,545	100.0%	3,749	100.0%	19,202	100.0%
Not in the labour force	28,941		6,291		2,840		19,810	
Occupation								
Upper White	7,603	26.0%	2,277	28.9%	959	27.5%	4,367	24.4%
Lower White	10,485	35.8%	2,438	30.9%	1,168	33.5%	6,879	38.4%
Upper Blue	4,883	16.7%	1,290	16.4%	601	17.3%	2,990	16.7%
Lower Blue	5,772	19.7%	1,735	22.0%	686	19.7%	3,356	18.7%
Other	516	1.8%	138	1.8%	68	2.0%	308	1.7%
Total	29,259	100.0%	7,878	100.0%	3,482	100.0%	17,900	100.0%
Average Number of Cars								
	1.50		1.66		1.56		1.43	
Household Income								
Average Weekly - Sept 2006 \$	\$912		\$912		\$996		\$899	
Average Weekly - Current \$	\$1,042		\$1,037		\$1,121		\$1,012	
Household Income - Sep 2006 \$	\$47,539		\$47,547		\$51,918		\$46,850	
Household Income - Current \$	\$54,330		\$54,068		\$58,445		\$52,740	
<i>Source: RPS, ABS</i>								
<i>Current Dollars - December 2010</i>								

Appendix B

Terms of Reference – Compliance

Term of Reference	Response
<p>Provide a retail and economic needs analysis within which the proposed landuses are justified against the existing supply and demand, location, site suitability and local and regional contexts and hierarchies;</p>	<p>This report provides a detailed analysis of the retail and employment/industrial uses that may be hosted on the subject site. A certain range of uses including bulky goods retail, light industry uses and business park uses are considered appropriate for all part or the site. Supporting uses, such as a small scale retail centre, are considered appropriate to service the on-site population.</p> <p>Other uses including retail (e.g. supermarkets) and commercial office space (unless ancillary to a business park use) are considered inappropriate for the site as they are better located in centres distributed through the Shire.</p>
<p>Provide an assessment of the land use suitability against the principles of the DoP “Integrating Land Use and Transport Policy” “Right Place for Business and Services Planning Policy”.</p>	<p>Each of the recommended uses has been assessed against this designated policy and this assessment has been utilised to determine the scale and range of appropriate uses. This analysis is contained in section 5 of the report.</p>
<p>Provide an assessment of the impact of the proposed retail / commercial development on established commercial centres in the Tweed, including the suitability of the site to complement existing strategies and not compete with established commercial and retail centres.</p>	<p>This analysis has been conducted in this report. The site will not contain any retail uses (except a small portion to service the on-site population) and such will not impact on the centres within the shire.</p> <p>The bulky goods retail might be located in a frame or fringe area adjacent to one of the major centres. This is not possible as the land is unavailable and the Machinery and Greenway drive precinct is approaching capacity. As demonstrated in the report, the demand for future bulky good retail space is such that the level of provision in 2006 could potentially double by 2021. If entirely developed for bulky goods uses, the subject site will fulfil only part of the projected 60,000 m² shortfall that will be evident in 2021.</p>
<p>Provide a recommendation on a suite of possible/suitable land uses and a concept plan showing appropriate retail, commercial or industrial zoning.</p>	<p>RPS recommends that the site can be developed in accordance with the Business Park (B7) zone. Included land uses are:</p> <ul style="list-style-type: none"> ▪ Light and service industry including related and allied uses such as storage and distribution ▪ Bulky goods retail (provided this component is in the order of 50% of the site in order to provide a balanced outcome that includes bulky goods and other employment generating uses) ▪ Commercial office (provided this component does not exceed 20% of the total floorspace) ▪ A small amount convenience retail and food and beverage services to service the on-site population <p>Other users can be established to service the working and on-site populations. These would include a small amount convenience retail and food and beverage services.</p> <p>Centre based uses should be excluded from this site. These uses include commercial office (other than that established as part of the business park) or retail uses (supermarkets, comparison shopping etc). The only retail use that should be provided on the subject site is ancillary food and beverage retail to service the onsite workers.</p>