-- CONFIDENTIAL --

26 February 2016

General Manager
Hunter & Central Coast
NSW Department of Planning and Environment
PO Box 1226
NEWCASTLE NSW 2016

Dear Sir/Madam,

RE: SUBMISSION TO DRAFT HUNTER REGIONAL PLAN 2015 AND DRAFT PLAN FOR GROWING HUNTER CITY 2015

1.0 INTRODUCTION

This letter has been prepared on behalf of Woolworths Limited (Woolworths) as a formal submission to the exhibition of the *Draft Hunter Regional Plan 2015* (Draft Regional Plan) and *Draft Plan for Growing Hunter City 2015* (Draft Plan for Hunter City).

We would like to thank the Department of Planning and Environment (Department) staff from the Newcastle Office for meeting with Woolworths on 29 January 2016 during the exhibition of the Draft Plans. A copy of the briefing note requested by the Department prior to this meeting can be found at **Appendix A**. While Woolworths is appreciative of a meeting being accommodated during the exhibition of both draft plans, this falls short of reasonable expectations which are outlined in this submission.

Overall both draft plans provide an acceptable overview statement about the region and Hunter City, however each document needs to provide specific direction rather than defer to additional strategic planning yet to be undertaken.

Woolworths does not wish to be critical of the work undertaken to prepare both draft plans but rather would like to ensure that both documents provide a comprehensive direction to improving and increasing the supply of suitably zoned and located retail land for supermarket infrastructure throughout both the Hunter Region and the Hunter city.

1.1 Background

Woolworths makes a significant contribution to economic development and employment across New South Wales (NSW). Woolworths is one of NSW's largest employers, with over 52,000 staff employed in over 900 stores including supermarkets, BIG W, petrol sites, Dan Murphy's, Thomas Dux, BWS liquor outlets and Masters Home Improvement stores. Woolworths continues to grow by over 7,000 employees a year. As an organisation the total number of persons employed in 2015 included a National workforce of over 193,000 of which over 111,000 people are employed in supermarkets across the country.

Woolworths ability to invest in NSW and service the needs (and provide jobs) for a growing population is heavily dependent on the capacity of planning, zoning and the development approval

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frameworks to facilitate new retail infrastructure investment. For many years, the NSW planning process has been identified by Woolworths as the most costly and onerous in the country.

Further, Woolworths has conveyed on a number of occasions over at least a decade to various local Council's in metropolitan and non-metropolitan locations detailed information and analysis with respect to the under-supply of retail supermarket floor space.

3.0 SUGGESTED APPROACH TO IMPROVING THE DRAFT PLANS AND OUTCOMES

3.1 Draft Plans Need Meaningful Engagement and Discussion with leaders in retail such as Woolworths prior to its creation

Over the years, Woolworths has made numerous submissions to draft documents published by the Department for exhibition such as the Draft Hunter Regional Plan and Draft Plan for Growing Hunter City.

None of the draft documents published by the Department to date have sought a collaborative process as a starting point before the creation of the draft documents with Woolworths. The same is true of the strategic planning process at the local Council level. However, the same issues are raised in submission after submission with little change in any planning framework as a result of any submission.

Where Woolworths has made submissions to strategic planning documents, there is rarely an invitation to substantially engage in the process, such as by responding to officer or expert reports and/or presenting a case to the Department or Council.

Woolworths is aware the regional plan was under review for a few years and that the Department released a discussion paper a few years ago, however only became aware of these steps long after the period for written feedback had closed. The consultation process which lead to the creation of the currently exhibited draft plans has failed to capture information which is most relevant to ensuring retail supermarket jobs are created in the most suitable locations identified by Woolworths as the biggest retail employer in NSW. This is because Woolworths was not engaged by the Department in the process of creating the draft plans.

This is a continuing frustration for Woolworths associated with the NSW planning system.

Woolworths has a suggestion to overcome this frustration. Woolworths is offering and wishes to work more closely and collaboratively with the Department and local Council's in the creation of strategic planning documents such as the Draft Hunter Regional Plan and Draft Plan for Growing Hunter City. We understand that the Department does undertake targeted consultation, however this is yet to include Woolworths.

Woolworths requests prior to issuing in the future any draft plan and in this case finalising the draft plans, the Draft Hunter Regional Plan and the Draft Plan for Growing Hunter City, that the Department engage and seek meaningful discussion, with the inclusion of feedback from Woolworths as the leader in retail supermarket infrastructure investment in NSW.

In this way, the process for development and finalisation of the draft plans can exhibit a more collaborative approach, rather than be a reactionary approach.

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3.2 The Department should lead the process for increasing retail capacity by undertaking a Retail Analysis to understand the performance of existing centres and the future capacity of centres for new retail supermarket infrastructure growth

We note the Draft Hunter Region Plan states:

> *ACTION 4.2.5 support retail growth in centres to promote vibrant, liveable communities*
>
> *Access to shopping is important for communities. Shopping is now often combined with other social and recreational activities and together they contribute to vibrant, liveable communities.*
>
> *Planning for retail space needs to recognise the current supply of space, and the demand for new space to meet community needs into the future.*
>
> *Retail is also a significant employer and generator of demand for travel.*
>
> *Planning for local centres will consider how they can accommodate more retail growth. In areas where there are no opportunities for existing centres to grow, local planning will need to consider where new retail space can be developed. Planning of local centres, including new centres, should prioritise*
>
> *The creation of mix-used hubs, with high quality public areas, walking connections, and good transport connections.*
>
> *The NSW Government will:*
>
> - *work with councils to develop a new supply and demand database to guide planning for retail space, which takes into account the changing demand for different types of retail, including supermarkets and large-format retail stores.*

Woolworths objects to the above approach.

Deferring retail analysis work to local Council's is not an appropriate outcome and has not worked to date. In addition, the development of a database at arms-length to the industry in unacceptable to Woolworths. Further each competitor in the industry uses its own database which include confidential information (and variables) about the performance of comparable locations which is commercial in confidence information. Existing modelling undertaken for local Councils have historically been conservative and result in years of delays in achieving new supermarkets to support local resident populations and defers the creation of jobs which could otherwise have been created sooner.

Currently, the provision of suitably located supermarket floor space does not receive adequate recognition during the creation of strategic planning documents. This may be in part as a result of a lack of engagement between the Department, Councils and industry during the development of strategic plans as detailed above.

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More so in Woolworths opinion, the lack of new retail infrastructure outcomes being provided to meet population needs is directly linked to restrictions on retail floor space, lack of flexibility in current planning frameworks and in particular supermarkets being solely restricted to existing centres despite existing demand and planned housing density increases.

More recently, an emphasis on retail centre hierarchies, over a divergent network of centres in Department strategic plans such as the Draft Hunter Regional Plan and Plan for Growing Hunter City, has simply meant Council's adopt and implement "no change is good policies". This ultimately means local residents do not have access to an optimum level of retail choice and competition when site specific planning proposals are rejected on the basis of being out of centre despite merit arguments being presented associated with under-supply of retail supermarket infrastructure floor space and suitably zoned land.

Woolworths applauds the Department's emphasis on strategic planning with the release of the Draft Hunter Regional Plan and the Draft Plan for Growing Hunter City. However, this also places increased importance on these strategic plans accurately reflecting current and future land-use zoning needs.

This is why we caution against emphasising the role of strategic planning without a corresponding emphasis on appropriate community and industry engagement in their formulation.

It is Woolworths position that not all retail supermarket infrastructure growth can be accommodated by existing centres as per the actions detailed in both draft plans.

By way of example, an analysis by MacroPlan Demasi of the local government areas (LGAs) within the Hunter Region when compared to the non-metropolitan (or regional average) has revealed that the floor space per 1000 head of population for retail supermarket infrastructure varies from LGA to LGA but in particular the amount of floor space for Newcastle is the lowest of any LGA in the Hunter region despite the focus on Newcastle as a priority in the draft plans. Refer to **Appendix B**.

Woolworths has sought to locate new supermarkets within existing centres where no Woolworths supermarket exists for many years in the Newcastle LGA. If appropriate sites were available, Woolworths would have already taken active steps to create suitable outcomes, this has not been the case of precincts such as Wallsend/Fletcher/Marylands despite numerous discussions and a rezoning application with Newcastle Council.

Historically Woolworths has only lodged site specific planning proposals when the relevant existing local planning legislation has failed to provide sufficient supply of suitably located zoned retail land to support local population infrastructure needs.

Newcastle Council has already prepared their own strategic planning documents as envisaged under the draft plans, which were used as reasons for why a rezoning application could not proceed. It should be noted that Woolworths withdrew their rezoning application on the basis of Council's strategic planning despite also demonstrating in this application no other suitably zoned site will be available in either the short or long term.

Consequently, this demonstrates Woolworth's inability to achieve appropriate levels of retail infrastructure investment in Newcastle despite their willingness to make provision for capital investment in new floor space and jobs due to existing strategic planning documents which align already with the draft plans. Therefore, the draft plans will not create new retail floor space within existing centres unless the Department takes on a leadership role in this area.

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As such, Woolworths has engaged MacroPlan Demasi to undertake a review which in part is an analysis of the capacity of existing centres within the Newcastle LGA to accommodate additional retail supermarket floor space and would like to work closely with the Department and Newcastle Council to achieve better outcomes. Woolworths welcomes an opportunity to discuss the outcomes of this analysis directly with the Department.

If the process of strategic planning were improved by encouraging greater industry engagement it may result in an overall reduction of the number of Planning Proposals lodged.

4.0 Conclusion

It is Woolworths' view that the Draft Hunter Regional Plan and Plan for Growing Hunter City both need more work prior to finalisation and subsequent implementation by local Councils. Woolworths specifically seek:

- A cross-collaborative process be established with industry;
- Greater detail within the draft plans on specific outcomes;
- Specific targets to include expanded retail floor space in correct locations; and
- Leadership by the Department in making decisions to create economic development impetus when a plan is endorsed, measurable direct outcomes and jobs.

Representatives from Woolworths and their experts welcome the opportunity and are available to meet with the Department to discuss the above concerns directly.

Should you have any queries or require clarification on any matters please do not hesitate to contact the undersigned on (02) 9929 4044.

Yours faithfully,

Marian Higgins
Planning Manager
Higgins Planning Pty Ltd

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APPENDIX A – EMAIL

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Marian Higgins

From: Marian Higgins
Sent: Thursday, 28 January 2016 1:53 PM
To: 'Amanda Carnegie'
Cc: Robert Hodgkins; Dylan.Meade@planning.nsw.gov.au; 'Nigel Smith'; 'Marc Lucas'
Subject: RE: Friday 18 January Meeting - commercial in confidence meeting

Hi Amanda,

Thanks for your email.

Woolworths would like to ensure that all discussions with the Department remain confidential, to ensure its competitors do not become aware of their plans and ensure the good working relationships built by the Woolworths team with local Council's and their staff are maintained to the highest professional standard possible.

To assist with tomorrow's meeting and by way of background/briefing for the Department:

- Woolworths have been working with local Council's in the LGAs of Newcastle, Lake Macquarie, Wyong and Gosford (among others) for a number of years, with varying outcomes.
- The experiences of the development team within Woolworths varies widely from LGA to LGA in these two regions. The resident populations in these LGAs continue to grow with new residential land releases and infill developments. Woolworths continues to seek new sites so as to service both existing and new resident populations with modern price competitive retail infrastructure.
- The 4 biggest issues affecting capital investment decisions to providing new retail infrastructure by Woolworths given the current retail market are:
    - 1. the time it takes to realise new retail facilities is too long and have significant degrees of uncertainty,
    - 2. The lack of opportunities for new large format retailing facilities within strategic planning frameworks,
    - 3. unexpected costs demanded by local Councils in the middle of the development process (both rezoning and DA), and
    - 4. The lack of suitably located sites which meet Woolworths access requirements for customers and logistics/servicing associated with large format retailing.
- Woolworths in partnership with their retail economic consultants undertake their own analyses to identify precincts where existing and future retail infrastructure demand is unmet based on existing and projected demand. This work is highly specialised in the retail industry and involves commercial in confidence information, as is the case for their competitors.
- These analyses consistently identify that the supply of suitably zoned land, which is not in fragmented land ownership, is unavailable in existing centres. Even if a site within an existing centre may become available it may be located in the middle of the "high street" and will require some form of site amalgamation however these sites do not allow access for the trucks which are needed to service a large format retail infrastructure such as a Woolworths supermarket or is unable to be conveniently accessible for customers.
- The design and logistics associated with locating large format retail infrastructure is a significant factor in finding suitable locations irrespective of whether land is suitably zoned. Thus Woolworths will seek to rezone land where no other sites are available or suitably located in an existing centre.
- The time taken to achieve retail infrastructure outcomes for existing and future resident populations in the Hunter and Central Coast regions currently takes too long to be achieved when compared to other States, and indeed other regions within NSW.
- By way of examples - in the Wyong LGA, rezonings have taken significant periods of time and included unexpected significant costs:
    - the rezoning of Lake Munmorah took 9 years to be realised. Woolworths was working closely with Council for significant period of time where Council had already agreed to support a rezoning

however after 7 years into the rezoning process with Council, Council advised they wanted a new bike path to be paid by Woolworths as part of the rezoning. If Council had identified their desire for Woolworths to make a contribution to new infrastructure early in the process this would have been more suitable, instead it was an opportunistic and part of a process to force Woolworths to enter into a VPA. At Lake Munmorah Woolworths was required to upgrade the Pacific Highway at a cost of several million dollars by the RMS along with Council imposing the VPA at a cost of $1.2 million dollars for the bike path. The cost of this VPA represented over 10% cost of the capital investment in the completed retail facility. By comparison S94 Contributions for multimillion dollar redevelopments in the Sydney CBD cost 3% of capital investment of development as a fixed cost.

  - the rezoning at Wadalba took 12 years and became reality after the 3rd rezoning application was lodged with Council at a time when pre-gateway reviews were available to an applicant, and after the Department released the North Wyong Structure Plan. Council granted approval to a DA in December 2015 which now requires infrastructure upgrading to Council road and drainage assets. It should be noted when Woolworths purchased this site it was one of the first in the land release estate to achieve an urban zoning however is now one of the last lots to be developed in that estate, and as a result now carries the burden of all other land having been developed now generating traffic and run-off which adversely impacts the Woolworths site. Council's S94 requirement for developing this existing urban zoned site for the retail facility is in excess of $1.8 million dollars, which is just under 10% of the capital investment cost. Council is open to considering a VPA and has been reviewing Woolworths various designs for the upgrades infrastructure for the last 6 months and is yet to agree to the further revised design issued in the first week of January 2016. Woolworths would like to commence construction and open the store by December 2016 but cannot achieve a Construction Certificate until the infrastructure design has been signed-off by Council.
  - Woolworths continues to work with Wyong Council on rezoning land for large format retailing such as that in Budgewoi, however the terms and amount of a VPA are yet to be offered by Council.
- By comparison, the Woolworths projects developed and now operational (which have included rezonings and/or reclassifications of land) in the Lake Macquarie LGA did not take these lengths of time or result in unexpected monetary costs - such as Morriset, Swansea, Cardiff.

Woolworths is seeking feedback from the Department with respect to:

1. Generally - what is the Department's view on large format retailing infrastructure?
2. Woolworths would like to discuss Newcastle and Wallsend in light of the draft Hunter regional plan where it states:

ACTION 4.2.5 Support retail growth in centres to promote vibrant, liveable communities

Access to shopping is important for communities. Shopping is now often combined with other social and recreational activities and together they contribute to vibrant, liveable communities.

Planning for retail space needs to recognise the current supply of space, and the demand for new space to meet community needs into the future.

Retail is also a significant employer and generator of demand for travel.

Planning for local centres will consider how they can accommodate more retail growth. In areas where there are no opportunities for existing centres to grow, local planning will need to consider where new retail space can be developed. Planning of local centres, including new centres, should prioritise the creation of mix-used hubs, with high quality public areas, walking connections, and good transport connections.

The NSW Government will:

- work with councils to develop a new supply and demand database to guide planning for retail space, which takes into account the changing demand for different types of retail, including supermarkets and large-format retail stores.

With this draft action in mind we draw the Department's attention to Newcastle Council's adopted strategic position. In 2013, Council engaged Hill PDA to prepare an "Employment Lands Strategy". The Hill PDA report makes the following statements at page 15:

The scope of this Strategy did not include detailed site visits of each of Newcastle's centres and employment lands. For these reasons Councils various surveys have proved a valuable resource of data for analysis. Notwithstanding the merits of this information, its use has resulted methodologically in some limitations. These limitations have generally related to the differences between how the survey data was collected and categorised. Accordingly, these differences have become apparent when we have attempted to cross compare forecast change with existing data using various data sources. By way of example, it has not been possible to provide a full and detailed floorspace demand and supply assessment without the benefit of existing floorspace survey data by retail centre and category[2]. For these reasons we have sought to apply the data as best possible whilst providing clear explanation of assumptions and exceptions.
Furthermore, the Study was initially prepared in 2010 and accordingly relied on the 2006 Census Data, which was the most up to date data available at that time. Following the release of some 2011 ABS Census Data in October 2012, the Study was subsequently updated where possible with more recent data. As a result, some components of the Study reference 2011 Census information, whilst some components continue to rely on the 2006 Census data. This approach has allowed for the most comprehensive and up to date assessment of matters as possible as of March 2013.
2 Note: Commercial Centres Audit 2009 provided details of retail type by centre and category but not by floorspace.

The Hill PDA employment lands strategy 2013 was then used by Council to underpin the preparation of a Local Planning Strategy as adopted in 2015. This is stated on Council's webpage.

Woolworths would like:

a. more information about the Department's supply and demand database particularly in light of the above, and
b. more detailed information now on what is the Department doing or intends to do, to assist industry and local government to accommodate more retail growth in existing centres as stated above

3. In addition, Woolworths would be interested in also discussing their efforts to find a suitable site for new large format retail infrastructure in the Yattalunga precinct of the Gosford LGA with regard to the following information in the draft Central Coast regional plan:

Direction 1.2 and Actions 1.2.1 and 1.2.2 discuss "growing and enhancing liveable local centres", Direction 2.1 of the Plan, which is to "support the 21st century needs of business" and talks about "monitoring changing land and infrastructure needs", and "regularly undertaking reviews of local planning controls of industrial and commercial areas", Action 2.1.3 of the Plan states that "the regions centres have an adequate supply of commercial zoned land to meet projected demand", with much of the future development to occur "through redevelopment and intensification of existing sites".

We trust this briefing is of assistance and look forward to meeting tomorrow.

Kind regards,

Marian Higgins - Planning Manager

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From: Amanda Carnegie [mailto:Amanda.Carnegie@planning.nsw.gov.au]
Sent: Thursday, 21 January 2016 10:05 AM
To: Marian Higgins <marian@higginsplanning.com.au>
Cc: Robert Hodgkins <Robert.Hodgkins@planning.nsw.gov.au>; Dylan.Meade@planning.nsw.gov.au
Subject: Friday 18 January Meeting

Hi Marian,

In anticipation of our meeting next week I just wanted to clarify whether or not you would like to discuss the Central Coast Woolworths sites?

If possible could you please identify any sites and/or issues you wish to discuss, ahead of next week's meeting, to ensure a productivity.

Look forward to hearing from you.
Kind regards,

Amanda Carnegie
Hunter & Central Coast Region
Department of Planning & Environment
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NSW GOVERNMENT | Planning & Environment

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APPENDIX B – MACROPLAN COMPARISON TABLE

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Table 2 (sorted by GLA per 1,000) NSW Regional LGAs - supermarket provision relative to population, 2015						
	2015 supermarkets > 500 sq.m			**2015 supermarkets > 3,000 sq.m**		
LGA	Smkt GLA	Population	GLA per 1,000	Smkt GLA	Population	GLA per 1,000
Temora	5,959	5,790	1,029	3,459	5,790	597
Lachlan	6,400	6,500	985	0	6,500	0
Gloucester	4,750	5,000	950	3,500	5,000	700
Gunnedah	10,082	12,700	794	7,530	12,700	593
Bogan	2,042	2,960	690	0	2,960	0
Cootamundra	5,070	7,390	686	4,070	7,390	551
Glen Innes Severn	5,914	8,820	671	0	8,820	0
Deniliquin	4,494	6,980	644	0	6,980	0
Narrabri	8,522	13,370	637	0	13,370	0
Forbes	5,700	9,370	608	3,000	9,370	320
Wellington	5,298	8,770	604	0	8,770	0
Griffith	15,288	25,600	597	10,688	25,600	418
Cooma-Monaro	6,096	10,310	591	0	10,310	0
Bourke	1,700	3,010	565	0	3,010	0
Muswellbrook	9,531	16,950	562	3,439	16,950	203
Hay	1,600	2,860	559	0	2,860	0
Narrandera	3,300	5,940	556	0	5,940	0
Jerilderie	800	1,470	544	0	1,470	0
Parkes	8,250	15,220	542	3,533	15,220	232
Eurobodalla	20,607	38,220	539	7,517	38,220	197
Cowra	6,625	12,340	537	0	12,340	0
Bega Valley	17,757	33,990	522	10,558	33,990	311
Broken Hill	9,781	18,750	522	8,981	18,750	479
Lismore	23,169	45,670	507	17,669	45,670	387
Albury	25,268	51,170	494	14,842	51,170	290
Coffs Harbour	36,388	74,630	488	28,896	74,630	387
Nambucca	9,439	19,650	480	3,198	19,650	163
Kempsey	14,180	29,550	480	8,333	29,550	282
Murray	3,623	7,560	479	3,623	7,560	479
Warren	1,300	2,730	476	0	2,730	0
Wentworth	3,200	6,810	470	0	6,810	0
Corowa Shire	5,311	11,380	467	0	11,380	0
Moree Plains	6,383	13,730	465	6,383	13,730	465
Tumut Shire	5,225	11,250	464	0	11,250	0
Armidale Dumaresq	12,206	26,470	461	7,948	26,470	300
Snowy River	3,586	7,990	449	0	7,990	0
Young	5,681	12,760	445	3,081	12,760	241
Upper Hunter Shire	6,491	14,600	445	0	14,600	0
Harden	1,600	3,620	442	0	3,620	0
Gwydir	2,187	4,980	439	0	4,980	0
Tenterfield	3,100	7,080	438	0	7,080	0
Great Lakes	15,878	36,510	435	7,750	36,510	212
Dubbo	18,079	41,610	434	10,873	41,610	261
Kyogle	4,100	9,590	428	0	9,590	0
Warrumbungle Shire	4,137	9,700	426	0	9,700	0
Ballina	17,703	41,710	424	7,361	41,710	176
Tamworth Regional	25,600	60,330	424	16,070	60,330	266
Port Stephens	**30,699**	**72,650**	**423**	**20,108**	**72,650**	**277**

Inverell	7,150	17,080	419	3,300	17,080	193
Lithgow	8,744	20,970	417	6,994	20,970	334
Coonamble	1,700	4,090	416	0	4,090	0
Wingecarribee	19,635	47,430	414	10,996	47,430	232
Bombala	1,000	2,420	413	0	2,420	0
Greater Taree	20,185	49,180	410	7,569	49,180	154
Port Macquarie-Hastings	32,163	78,690	409	21,246	78,690	270
Yass Valley	6,867	16,880	407	0	16,880	0
Leeton	4,653	11,440	407	0	11,440	0
Singleton	9,887	24,340	406	6,687	24,340	275
Mid-Western Regional	9,494	23,520	404	3,342	23,520	142
Lake Macquarie	**80,112**	**200,650**	**399**	**62,310**	**200,650**	**311**
Bland	2,331	5,840	399	0	5,840	0
Maitland	**30,336**	**76,200**	**398**	**19,369**	**76,200**	**254**
Wagga Wagga	24,648	64,320	383	15,665	64,320	244
Newcastle	**61,300**	**162,510**	**377**	**41,434**	**162,510**	**255**
Narromine	2,534	6,770	374	0	6,770	0
Shellharbour	25,897	69,760	371	18,948	69,760	272
Clarence Valley	19,138	52,300	366	12,336	52,300	236
Tweed	33,595	92,890	362	19,900	92,890	214
Byron	11,370	31,940	356	0	31,940	0
Orange	14,466	40,880	354	7,030	40,880	172
Bathurst Regional	14,953	42,310	353	8,488	42,310	201
Gundagai	1,300	3,710	350	0	3,710	0
Shoalhaven	33,619	99,080	339	18,596	99,080	188
Richmond Valleys	7,904	23,300	339	0	23,300	0
Queanbeyan	14,665	43,600	336	12,346	43,600	283
Blayney	2,400	7,360	326	0	7,360	0
Cobar	1,530	4,820	317	0	4,820	0
Walgett	2,043	6,680	306	0	6,680	0
Gilgandra	1,350	4,460	303	0	4,460	0
Wollongong	62,579	208,690	300	37,203	208,690	178
Goulburn Mulwaree	8,702	29,510	295	7,449	29,510	252
Kiama	6,301	21,760	290	3,251	21,760	149
Cessnock	15,607	55,220	283	7,421	55,220	134
Greater Hume Shire	2,750	10,090	273	0	10,090	0
Weddin	1,000	3,670	272	0	3,670	0
Lockhart	800	2,980	268	0	2,980	0
Junee	1,500	6,150	244	0	6,150	0
Coolamon	950	4,170	228	0	4,170	0
Dungog	1,800	8,630	209	0	8,630	0
Liverpool	1,500	7,830	192	0	7,830	0
Oberon	900	5,200	173	0	5,200	0
Berrigan	1,400	8,300	169	0	8,300	0
Walcha	500	3,060	163	0	3,060	0
Guyra	500	4,580	109	0	4,580	0
Uralla	600	6,330	95	0	6,330	0
Palerang	1,225	15,810	77	0	15,810	0
Bellingen	800	12,980	62	0	12,980	0
Cabonne	700	13,880	50	0	13,880	0
Non-metro NSW	**-**	**-**	**401**	**-**	**-**	**216**
NSW	**-**	**-**	**304**	**-**	**-**	**167**
Australia		**-**	**340**	**-**	**-**	**196**

Source: ABS, MacroPlan Dimasi

Table 1 (sorted by LGA population) NSW Regional LGAs - supermarket provision relative to population, 2015						
	2015 supermarkets > 500 sq.m			2015 supermarkets > 3,000 sq.m		
LGA	Smkt GLA	Population	GLA per 1,000	Smkt GLA	Population	GLA per 1,000
Wollongong	62,579	208,690	300	37,203	208,690	178
Lake Macquarie	**80,112**	**200,650**	**399**	**62,310**	**200,650**	**311**
Newcastle	**61,300**	**162,510**	**377**	**41,434**	**162,510**	**255**
Shoalhaven	33,619	99,080	339	18,596	99,080	188
Tweed	33,595	92,890	362	19,900	92,890	214
Port Macquarie-Hastings	32,163	78,690	409	21,246	78,690	270
Maitland	**30,336**	**76,200**	**398**	**19,369**	**76,200**	**254**
Coffs Harbour	36,388	74,630	488	28,896	74,630	387
Port Stephens	**30,699**	**72,650**	**423**	**20,108**	**72,650**	**277**
Shellharbour	25,897	69,760	371	18,948	69,760	272
Wagga Wagga	24,648	64,320	383	15,665	64,320	244
Tamworth Regional	25,600	60,330	424	16,070	60,330	266
Cessnock	15,607	55,220	283	7,421	55,220	134
Clarence Valley	19,138	52,300	366	12,336	52,300	236
Albury	25,268	51,170	494	14,842	51,170	290
Greater Taree	20,185	49,180	410	7,569	49,180	154
Wingecarribee	19,635	47,430	414	10,996	47,430	232
Lismore	23,169	45,670	507	17,669	45,670	387
Queanbeyan	14,665	43,600	336	12,346	43,600	283
Bathurst Regional	14,953	42,310	353	8,488	42,310	201
Ballina	17,703	41,710	424	7,361	41,710	176
Dubbo	18,079	41,610	434	10,873	41,610	261
Orange	14,466	40,880	354	7,030	40,880	172
Eurobodalla	20,607	38,220	539	7,517	38,220	197
Great Lakes	15,878	36,510	435	7,750	36,510	212
Bega Valley	17,757	33,990	522	10,558	33,990	311
Byron	11,370	31,940	356	0	31,940	0
Kempsey	14,180	29,550	480	8,333	29,550	282
Goulburn Mulwaree	8,702	29,510	295	7,449	29,510	252
Armidale Dumaresq	12,206	26,470	461	7,948	26,470	300
Griffith	15,288	25,600	597	10,688	25,600	418
Singleton	9,887	24,340	406	6,687	24,340	275
Mid-Western Regional	9,494	23,520	404	3,342	23,520	142
Richmond Valleys	7,904	23,300	339	0	23,300	0
Kiama	6,301	21,760	290	3,251	21,760	149
Lithgow	8,744	20,970	417	6,994	20,970	334
Nambucca	9,439	19,650	480	3,198	19,650	163
Broken Hill	9,781	18,750	522	8,981	18,750	479
Inverell	7,150	17,080	419	3,300	17,080	193
Muswellbrook	9,531	16,950	562	3,439	16,950	203
Yass Valley	6,867	16,880	407	0	16,880	0
Palerang	1,225	15,810	77	0	15,810	0
Parkes	8,250	15,220	542	3,533	15,220	232
Upper Hunter Shire	6,491	14,600	445	0	14,600	0
Cabonne	700	13,880	50	0	13,880	0
Moree Plains	6,383	13,730	465	6,383	13,730	465
Narrabri	8,522	13,370	637	0	13,370	0
Bellingen	800	12,980	62	0	12,980	0

Young	5,681	12,760	445	3,081	12,760	241
Gunnedah	10,082	12,700	794	7,530	12,700	593
Cowra	6,625	12,340	537	0	12,340	0
Leeton	4,653	11,440	407	0	11,440	0
Corowa Shire	5,311	11,380	467	0	11,380	0
Tumut Shire	5,225	11,250	464	0	11,250	0
Cooma-Monaro	6,096	10,310	591	0	10,310	0
Greater Hume Shire	2,750	10,090	273	0	10,090	0
Warrumbungle Shire	4,137	9,700	426	0	9,700	0
Kyogle	4,100	9,590	428	0	9,590	0
Forbes	5,700	9,370	608	3,000	9,370	320
Glen Innes Severn	5,914	8,820	671	0	8,820	0
Wellington	5,298	8,770	604	0	8,770	0
Dungog	1,800	8,630	209	0	8,630	0
Berrigan	1,400	8,300	169	0	8,300	0
Snowy River	3,586	7,990	449	0	7,990	0
Liverpool	1,500	7,830	192	0	7,830	0
Murray	3,623	7,560	479	3,623	7,560	479
Cootamundra	5,070	7,390	686	4,070	7,390	551
Blayney	2,400	7,360	326	0	7,360	0
Tenterfield	3,100	7,080	438	0	7,080	0
Deniliquin	4,494	6,980	644	0	6,980	0
Wentworth	3,200	6,810	470	0	6,810	0
Narromine	2,534	6,770	374	0	6,770	0
Walgett	2,043	6,680	306	0	6,680	0
Lachlan	6,400	6,500	985	0	6,500	0
Uralla	600	6,330	95	0	6,330	0
Junee	1,500	6,150	244	0	6,150	0
Narrandera	3,300	5,940	556	0	5,940	0
Bland	2,331	5,840	399	0	5,840	0
Temora	5,959	5,790	1,029	3,459	5,790	597
Oberon	900	5,200	173	0	5,200	0
Gloucester	4,750	5,000	950	3,500	5,000	700
Gwydir	2,187	4,980	439	0	4,980	0
Cobar	1,530	4,820	317	0	4,820	0
Guyra	500	4,580	109	0	4,580	0
Gilgandra	1,350	4,460	303	0	4,460	0
Coolamon	950	4,170	228	0	4,170	0
Coonamble	1,700	4,090	416	0	4,090	0
Gundagai	1,300	3,710	350	0	3,710	0
Weddin	1,000	3,670	272	0	3,670	0
Harden	1,600	3,620	442	0	3,620	0
Walcha	500	3,060	163	0	3,060	0
Bourke	1,700	3,010	565	0	3,010	0
Lockhart	800	2,980	268	0	2,980	0
Bogan	2,042	2,960	690	0	2,960	0
Hay	1,600	2,860	559	0	2,860	0
Warren	1,300	2,730	476	0	2,730	0
Bombala	1,000	2,420	413	0	2,420	0
Jerilderie	800	1,470	544	0	1,470	0
Non-metro NSW	-	-	**401**	-	-	**216**
NSW	-	-	**304**	-	-	**167**
Australia		-	**340**	-	-	**196**

Source: ABS, MacroPlan Dimasi

Table 3

Newcastle Region LGA population, 2006-2031*

	Estimated population			**Forecast population**				**Total Change**
LGA	2006	2011	2015	2018	2021	2026	2031	2015-31
Newcastle	146,210	155,430	162,510	167,850	173,220	181,720	189,920	27,410
Lake Macquarie	188,520	196,890	200,650	203,980	207,580	212,880	217,930	17,280
Maitland	63,280	69,800	76,200	80,730	85,140	92,640	100,390	24,190
Port Stephens	62,350	67,330	72,650	76,100	79,280	84,330	89,030	16,380
					Average annual growth (no.)			
LGA		2006-11	2011-15	2015-18	2018-21	2021-26	2026-31	2015-31
Newcastle		1,844	1,770	1,780	1,790	1,700	1,640	1,713
Lake Macquarie		1,674	940	1,110	1,200	1,060	1,010	1,080
Maitland		1,304	1,600	1,510	1,470	1,500	1,550	1,512
Port Stephens		996	1,330	1,150	1,060	1,010	940	1,024
					Average annual growth (%)			
LGA		2006-11	2011-15	2015-18	2018-21	2021-26	2026-31	2015-31
Newcastle		1.2%	1.1%	1.1%	1.1%	1.0%	0.9%	1.0%
Lake Macquarie		0.9%	0.5%	0.6%	0.6%	0.5%	0.5%	0.5%
Maitland		2.0%	2.2%	1.9%	1.8%	1.7%	1.6%	1.7%
Port Stephens		1.5%	1.9%	1.6%	1.4%	1.2%	1.1%	1.3%

**As at June*

Source: ABS Census 2011; NSW Department of Planning and Environment 2014; MacroPlan Dimasi