

SHOROC Employment Lands Study (2008) and Addendum (2011)

In 2008, Hill PDA (economic consultant) was engaged by SHOROC (Shore Regional Organisation of Councils - a partnership between Manly, Mosman, Pittwater and Warringah Councils) to undertake a regional study for sustainable growth for the period of 2006-2031. In 2011, Hill PDA prepared an addendum for the purpose of providing an update to the analysis undertaken in 2008 taking into account the newly available information and population forecasts.

Both of the reports indicated that by 2031 there would be a significant increase in demand for retail floor space of 101,196m² by 2036. The 2008 study discovered that there was an undersupply of supermarket floorspace and bulky goods retail in Pittwater. The study foresaw that the net additional demand of bulky goods for within the region is 15,730m² by 2016 and 51,430m² by 2031. Pittwater area will require additional 5,723m² by 2016 and 22,767m² by 2031.

The study suggested that Warriewood Valley Release area should continue to be promoted as a location for high-quality commercial floor space in association with light industry and distributions. The Boondah Road South area should be investigated for its potential contribution to employment lands and its synergy with existing office space and business in Vuko Place and/or retailers such as Warriewood Centro. An alternative option to be investigated is the area's designation as a B5 Business Development Zone to facilitate the provision of Bulky Goods Premises for integration with Warriewood Centro.

The study recommended a master plan to seek opportunities to expand and integrate this area with additional retailers and commercial services to form a village centre for Warriewood Valley. However, the recently expanded shopping centre layout discouraged the integration with potential retail development in the surrounding areas. In GMU's opinion, this is a missed opportunity as it leads to a piecemeal approach. Other opportunities should be investigated to enhance the variety of retail offerings and job generation.

The study also sets the guiding principles for bulky goods retail development, which include:

- The development should primarily be located within or surrounding existing commercial centres to help ensure a centres vitality, viability and a sustainable form of development that will not 'crowd out' industrial users from industrial land.
- Economic Impact Assessment (EIA) study that looks at the impact on a regional basis with the centre hierarchy to be protected.

Pittwater Public Space and Recreation Strategy 2014 & Warriewood Valley Release Area - Landscape Masterplan and Design Guidelines (Public Domain) 2016

The Recreation Strategy 2014 set a clear direction for future public space, sport and recreational planning and expenditure. It identified that the Warriewood Valley Release Area had a critical shortfall of 6,32 hectares of open space under the increasing population and based on the industrial standard of 2.83 hectares of open space provision per 1,000 population for Warriewood Valley. To ensure the delivery of sufficient open spaces for future residents, the study recommended purchasing the majority of the Southern Buffer Area including the site, as part of the area required for delivering sports fields for the Release Area, which had been identified in the S94 Plan. However, the analysis discussed in the Planning Proposal Report prepared by SJB Planning suggests that there is an abundance of open space in the precinct.

The study also discovered that walking and cycling were among the most popular activities for health and fitness in the area. Council aimed to provide increased opportunity for walking and cycling for health and environmental benefits.

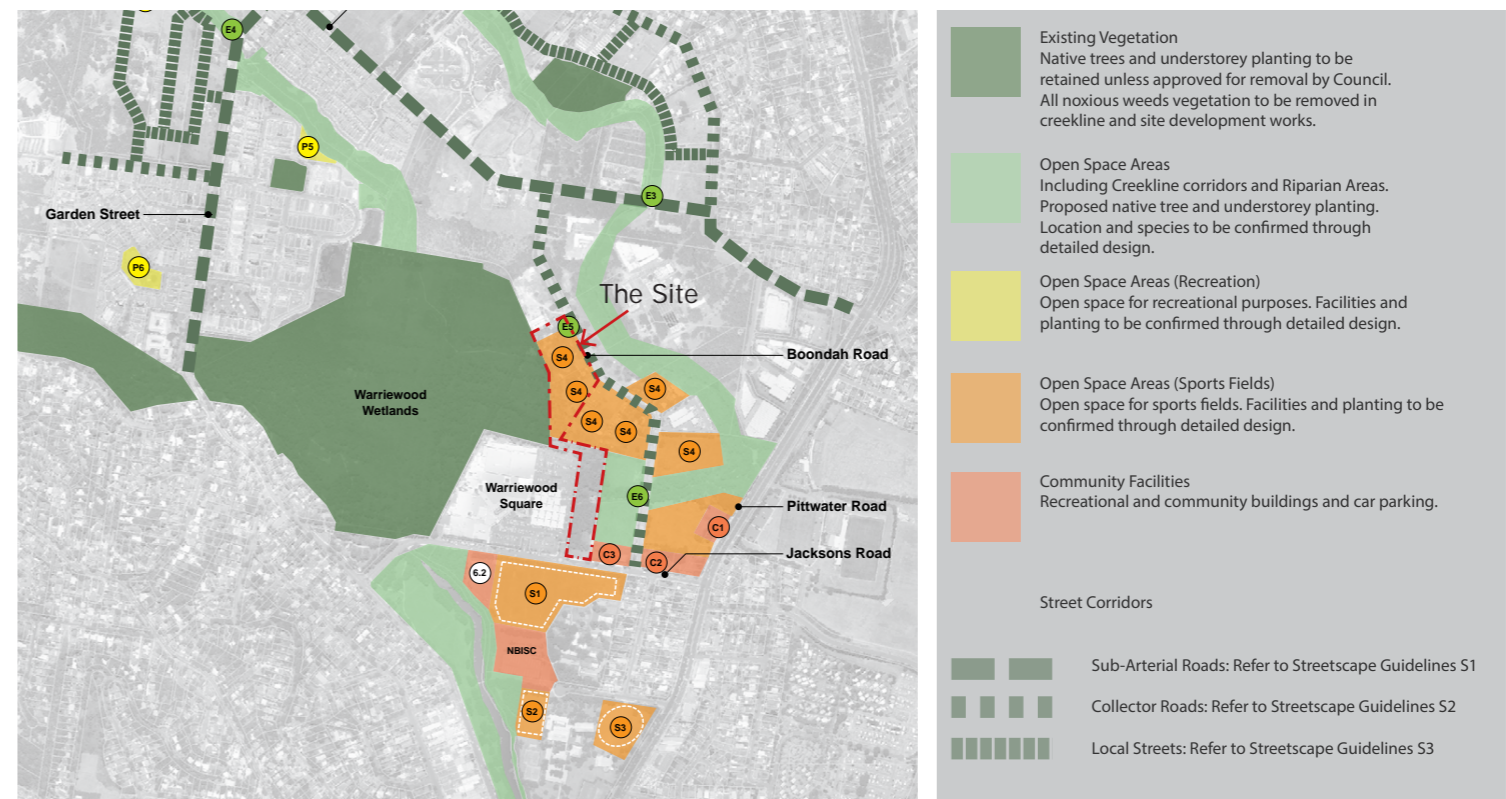


Figure 13. Warriewood Valley Open Space and Streetscape Masterplan (source: Warriewood Valley Release Area - Landscape Masterplan and Design Guidelines 2016)

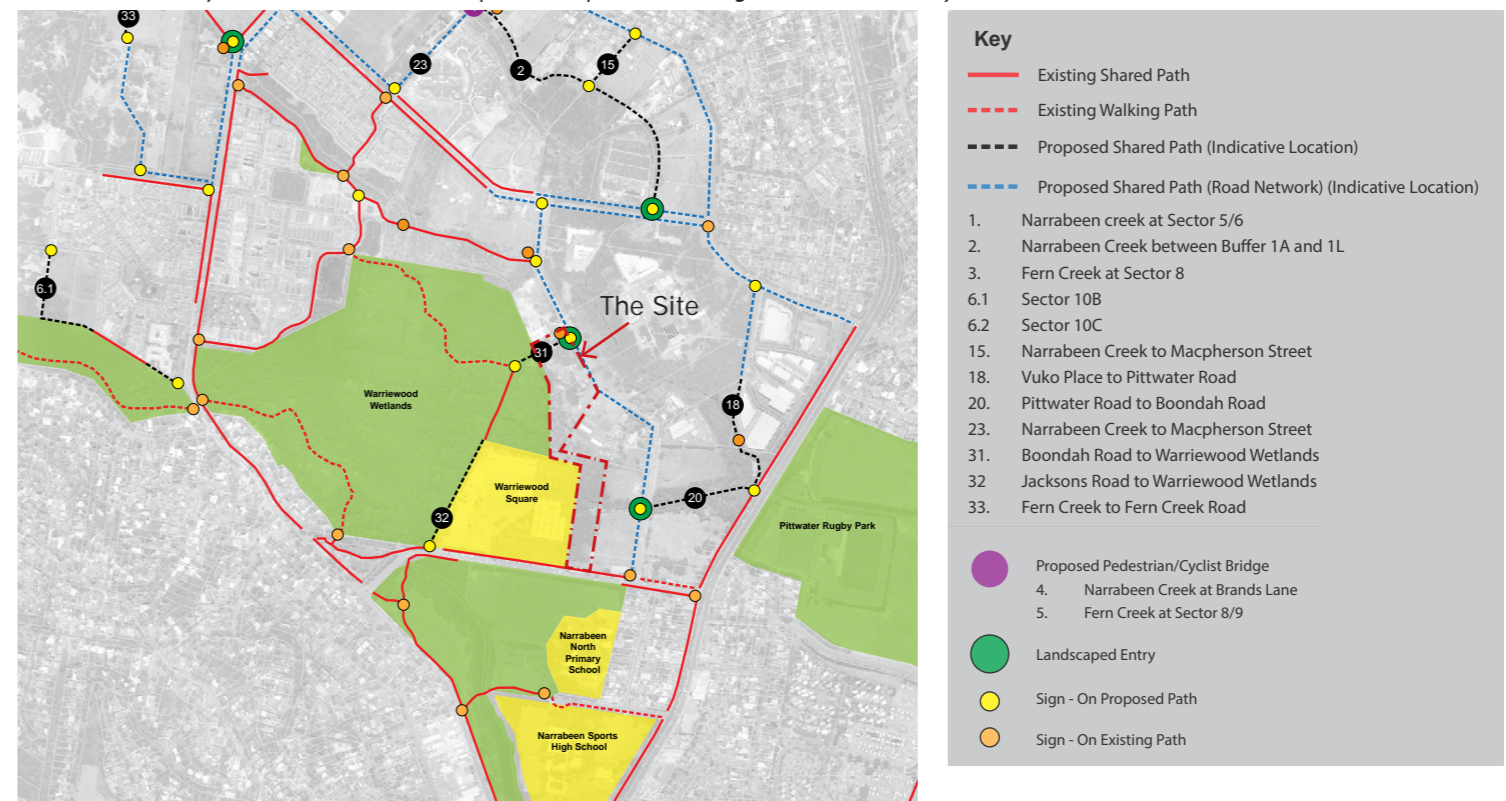


Figure 14. Warriewood Valley Active Travel Masterplan (source: Warriewood Valley Release Area - Landscape Masterplan and Design Guidelines 2016)

1.6 ECONOMIC STUDY

In 2016, Pittwater Council prepared the Draft Landscape Masterplan and Design Guidelines to incorporate the strategic development direction of the area and establish a coordinated basis and minimum standards to deliver a coherent and sustainable open space strategy catering for the future growth of the local area.

The key public domain masterplan elements in relation to the site include:

- Establish a pedestrian and cycling network to improve the walkability and connectivity of the area
- Transform northern part of the site (No. 3, 10 & 12 Boondah Road) to be open space areas for the use of sports fields.
- Provide a cluster of community facilities around the intersection of Jacksons Road and Boondah Road and along Pittwater Road, associated with an ample area of open space and sports fields to the north and south.
- Boondah Road as the collector road is proposed to be a 2-lane traffic road with street parking on both sides. Street tree planting is to be generally installed at 6-12m intervals as per the masterplan. Existing trees over 3m in height are to be retained where possible and subject to the health condition.
- Provide a new shared path with landscaped entry from Boondah Road to the wetland through the northern end of the site (No. 10 Boondah Road).

While the Landscape Masterplan suggests that this area (including the subject site) should be transformed into open space areas, the Economic Impact Assessment report prepared by Leyshon Consulting highlights a market need for the increase of bulky goods offering in the precinct. The site is already located in proximity to a shopping centre and it presents the opportunity to meet this need. GMU estimates that due to the availability of land elsewhere for recreational uses, the subject site's highest and best use is the provision of employment generating uses and meet the undersupply of bulky goods in the area which is supported by the economic study.

The Economic Impact Assessment prepared by Leyshon Consulting has reviewed the existing retail patterns in the region surrounding Warriewood. The study analyses the potential demand of bulky goods retail development within the identified trade area (see Figure 15) in line with the projected population growth.

Based on the study, there are 3 major bulky goods centres/precincts (including Belrose, Manly Vale and Brookvale) in the region surrounding Warriewood. Belrose with the largest concentration of bulky goods floorspace attracts shoppers from a wide area including the Northern Beaches and the Upper North Shore to Hornsby. There is a small amount of bulky goods supply within the major retail centres in Northern Beaches Council Area.

However, it is noted that most of the current supply is outside of the trade area. This is one of the main reasons which results in a big shortfall of bulky goods floorspace provision (approx. 48,000m²) for the trade area when compared to the current level of demand. Apart from the existing under-supply of the bulky goods retail, the projected population growth and the available retail spending on bulky goods reveals that there is an increasing demand for additional bulky goods floorspace within the trade area between 2016-2026. The total increase in floorspace is 8,234m² in total and 6,086m² within the Primary Trade Area including Warriewood.

The report also concluded that any future development of approximately 15,000m² NLA of bulky goods within the Warriewood Centre would have very low impacts on major traditional centres including Warriewood Square, Mona Vale, Dee Why and Westfield Warringah Mall. It will have low/medium impacts on Belrose Super Centre (-9.2%), Manly Vale (-7.4%); however, these impacts would not lead to any increase in retail vacancies in 2021, therefore considered acceptable.

According to the report, additional bulky goods floorspaces within the trade area are in high demand. The site's strategic location in the heart of the area provides a good opportunity to accommodate bulky goods retail development servicing the region.

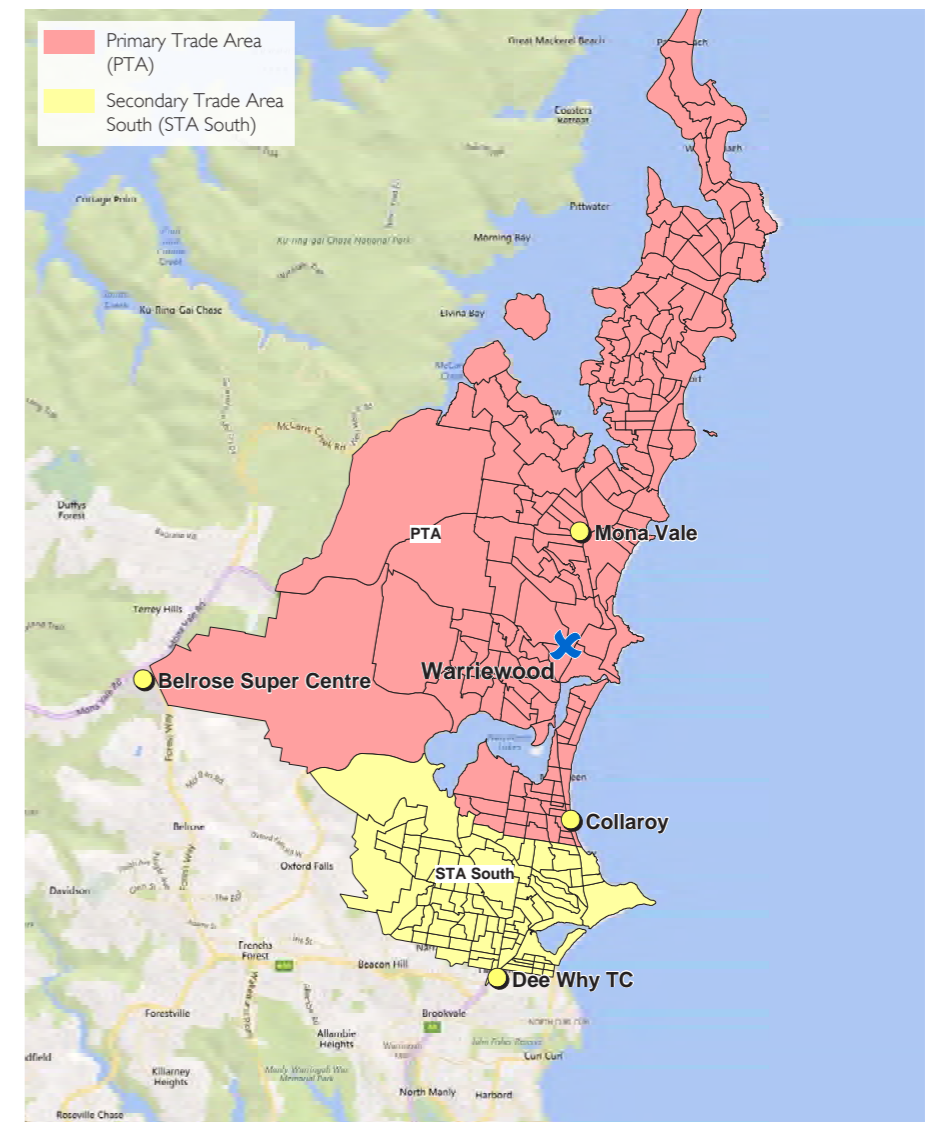


Figure 15. Warriewood Bulky Goods Trade Area (source: Economic Impact Assessment prepared by Leyshon Consulting)

2. THE SITE AND ITS CONTEXT

