

**Greater Shepparton Planning Scheme – Planning Scheme  
Amendments C192 and C193**

**Planning Panel**

**Expert Witness Evidence**

**Re: Peer Review of Retail Economic Impacts and Planning**

**Alex Hrelja, Principal, Hill PDA Pty Ltd**

**Instructed by Greater Shepparton City Council**

**17 July 2017**

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# 1. CREDENTIALS

## 1.1 OVERVIEW OF CREDENTIALS

1. I, Alex Hrelja, make this statement to assist the Panel appointed to hear matters in relation to proposed Amendments C192 and C193 to the Greater Shepparton Planning Scheme.
2. I am an urban economist and planner, having qualifications in planning and business (property). I am a Member of the Planning Institute of Australia. I am a Principal Consultant of Hill PDA Pty Ltd and have managed the Melbourne office of the firm for over three years. I was previously a Director of SGS Economics and Planning Pty Ltd for approximately 8 years. I have worked in the field of urban economics for about 22 years.
3. I have prepared a number of retail and activity centre assignments over the past two decades. A sample of projects is shown in Appendix 1 (Alex Hrelja CV).
4. I was project manager of a peer review report titled 'Review of Shepparton North Retail Proposal' for Greater Shepparton City Council in February 2017 and a preliminary opinion regarding a proposal to expand Shepparton Marketplace in 2016 in my capacity as Principal Consultant at Hill PDA Pty Ltd. Other staff at Hill PDA Pty Ltd assisted in the preparation of the documents.
5. My business address is Suite 114, 838 Collins Street, Docklands 3008.

## 1.2 INSTRUCTIONS

6. HWL Ebsworth Lawyers, on behalf of Greater Shepparton City Council, instructed me to provide Expert Evidence in relation to retail impacts and planning for the benefit of the Panel.
7. Specifically, I have been asked to:
  - a. Peer review selected reports prepared by other consultants. I have not prepared a primary economic impact report or analysis regarding the City of Greater Shepparton Commercial Activity Centres Strategy (CACS) or specific retail proposals but have reviewed such analysis of other consultants;
  - b. Provide an opinion on whether retail development proposals will unreasonably impact on the Shepparton CBD; and
  - c. Provide an opinion on submissions made to the Amendments, focusing on retail impacts and planning.

## 1.3 INFORMATION RELIED UPON

8. I have relied on the reports and data sources listed below.

- a. City of Greater Shepparton Commercial Activity Centres Strategy, Essential Economics for Greater Shepparton City Council, November 2015;
- b. Shepparton North Neighbourhood Centre: Economic Impact Assessment, MacroPlan Dimasi for Lascorp Development Group, January 2017;
- c. Letter submitted in relation to Shepparton Marketplace Expansion Proposal in the context of Planning Scheme Amendment C192, Dexus, 8 August 2016;
- d. Shepparton North Victoria, Retail Floorspace Potential, Location IQ Prepared for 18 Pty Ltd, June 2017;
- e. Selected (retail and activity centre focused) submissions in relation to Amendments C192 and C193 to the Greater Shepparton Planning Scheme;
- f. Exhibited documents in relation to Amendments C192 and C193 to the Greater Shepparton Planning Scheme; and
- g. Demographic, retail and other data sources listed in this statement.

## 2. OVERVIEW OF PEER REVIEW

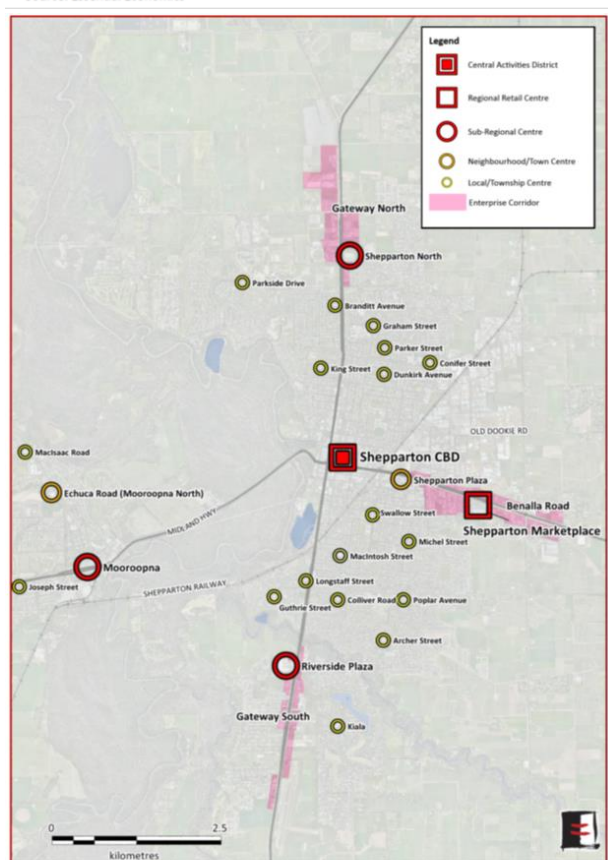
### 2.1 C192 COMMERCIAL ACTIVITY CENTRES STRATEGY

9. The Commercial Activity Centres Strategy (CACS) provides a strategic framework for retail and activity centres in the municipality, as shown in the table and map below. CACS has been adopted as Council policy.

#### 10. CACS Activity Centre Hierarchy

Level in Hierarchy	No. of Centres in Shepparton	Centre
Shepparton Central Activities District	1	Shepparton CBD
Regional Retail Centre	1	Shepparton Marketplace
Sub-Regional Centre	3	Riverside, Mooroopna CBD, Shepparton North
Neighbourhood Centre or Town Centre	3	Echuca Road (Mooroopna North), Rowe Street East, Tatura
Local Centre or Township Centre	29	Branditt Ave, Graham St, Parkside Drv, King St, Dunkirk Ave, Conifer St, Parker St, Macintosh St, Swallow St, Michel St, Poplar Ave, Archer St, Colliver Rd, Guthrie St, Longstaff St, Kialla Lakes, Joseph St, MacIsaac Rd, St Georges Road, Murchison, Dookie, Toolamba, Tallygaroopna, Undera, Shepparton East, Lemnos, Congupna, Katandra West, Merrigum
Enterprise Corridor	3	Benalla Road, Gateway North, Gateway South

Source: Essential Economics



Source: Essential Economics with MapInfo and StreetPro  
Note: Shepparton North a future sub-regional centre

Source: Greater Shepparton Commercial Activity Centres Strategy, November 2015

11. In my opinion the hierarchy is reasonable. The hierarchy reflects existing conditions and provides for growth and change in the network. The hierarchy affirms Shepparton CBD to continue to be the primary centre supported by four other significant centres and smaller nodes.
12. Specific issues that have been identified for review are the size and composition of proposed expansions to:
  - a. Shepparton Marketplace – nominated as a Regional Retail Centre to the east of the CBD; and
  - b. Shepparton North – nominated as a subregional centre to the north of the CBD.

## 2.2 SHEPPARTON MARKETPLACE

13. A shop floorspace cap of 15,000 sqm currently applies to Shepparton Marketplace in order to ensure that retail development does not undermine the primacy of the Shepparton CBD.
14. CACS has taken a position to recognise Shepparton Marketplace's capacity to grow and has designated it a Regional Centre with the following Planning Scheme provision recommendations:
  - a. 22,500 sqm shop floorspace cap;
  - b. Including a cap on new shop tenancies above 4,000 in size (subject to planning permit);
  - c. An office floorspace cap equivalent to approximately 10% of shop floorspace cap; and
  - d. Control of cinema and cinema-based entertainment facilities.
15. Dexu presented a letter to Council (August 2016) a preliminary concept plan for the centre's expansion. The Dexu submission flags an increase in the size of Shepparton Marketplace, potentially beyond 22,500 sqm.
16. The general impact of additional floorspace provision at Shepparton Marketplace is considered below based on the assumptions of an additional floorspace of 7,500 sqm retail.
17. If so, the general outcome would be a consolidation of Shepparton Marketplace as a significant retail centre, as envisaged by CACS.
18. Based on the concept of 22,500 sqm, an additional 7,500 sqm of retail space could be absorbed at Shepparton Marketplace without causing critical economic damage to the CBD. High-level quantitative benchmarks are shown below to support this opinion.

## 19. Greater Shepparton Retail Benchmarks

	2016	2021	2026	2031
Population	63,828	66,964	70,333	73,676
Occupied Private Dwellings	25,348	26,931	28,578	30,222
Indicative Supportable Retail Floorspace SQM	140,422	148,995	158,249	167,613
Required Market Share at 15,000 SQM	10.68%	10.07%	9.48%	8.95%
Residual SQM	125,422	133,995	143,249	152,613
Required Market Share at 22,500 SQM	16.02%	15.10%	14.22%	13.42%
Residual SQM	117,922	126,495	135,749	145,113

Source Population: Victoria in Future 2016.

Source Supportable Floorspace: 2.20 sqm / person in 2016 rising to 2.27 on 2031 (HillPDA).

- 20. As a regional centre, Shepparton Marketplace takes about 10.7% market share (of municipal demand; ignoring the broader region beyond Greater Shepparton in this indicative review). If the 22,500 sqm is delivered in the next few years, it would take about 16.0% market share. If the space did not increase over 22,500 sqm to 2031, the market share would be around 13.4% at that time.**
- 21. The scale of these figures suggests that the space can be absorbed at Shepparton Marketplace without critical damage to the CBD for the 2016 to 2031 period.**

## 2.3 C193 SHEPPARTON NORTH

**22. CACS notes that Shepparton North:**

- a. Currently functions as a neighbourhood activity centre;
- b. Has an existing IGA supermarket; and
- c. Has a limited supply of local speciality shops and other non-retail uses to support its current role.

**23. The IGA supermarket site is zoned Commercial 1 and has a Planning Scheme shop floorspace cap of 8,000 sqm. Existing floorspace is estimated around 4,000 sqm.**

**24. CACS notes that the Shepparton North activity centre is strategically located in terms of access from northern areas of urban Shepparton and that the centre's patronage is primarily generated from the northern areas of urban Shepparton and from rural and regional areas to the north and north-west.**

**25. CACS recommends that Shepparton North be classified as a subregional centre. The centre is encouraged to grow and diversify, potentially with the addition of a second full-line supermarket and enhanced supporting retail (not including a major non-food retail anchor such as a discount department store). Specific directions are summarised in Appendix 2.**

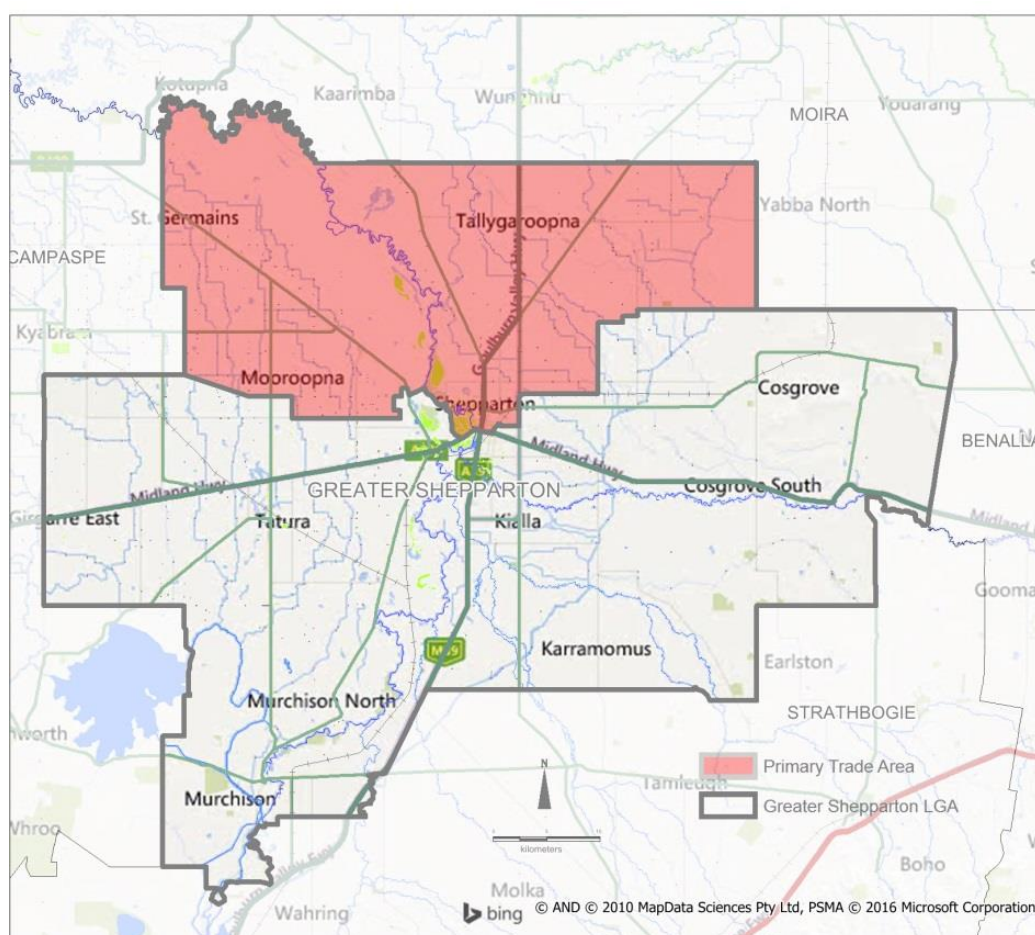
26. To test retail development proposals for Shepparton North, an indicative retail assessment is shown below. This is a preliminary analysis that has been developed to provide an order of magnitude guide to retail needs in the location under the role of a supermarket-based centre.

27. An indicative Primary Trade Area (PTA) for the Northern Shepparton Subregion is defined by the data areas shown below. This is indicative only. Retail demand would be drawn from other areas and flow to other areas. Nevertheless, the base need for subregional retail space can be measured within a reasonable margin using this area.

28. It is estimated that the Northern Shepparton Subregion has approximately 22,500 residents. The population may reach approximately 27,000 by 2031.

**29. Primary Trade Area Estimate for Shepparton North (Indicative)**

Year	2016	2021	2026	2031
Population (Forecast ID August 2015)	22,844	24,356	25,904	27,422
Population ABS Census 2016 (Customised Data)	22,445	-	-	-
Revised Forecast	22,445	23,931	25,452	26,943



30. A number of retail demand metrics are shown below. This shows that:

- The population of the Northern Shepparton Subregion supports approximately 49,400 sqm of retail space in 2016 and this is expected to increase to approximately 61,300 sqm by 2031.



- b. Shepparton North is a subregional centre as defined by CACS. Therefore, it is assumed Shepparton North will play no substantive role in the following retail sectors: Department Stores; Restaurants, Hotels and Clubs; Clothing Stores; Bulky Goods Stores; and Other Personal & Household Goods Retailing.
- c. It is assumed that the focus of the centre will be on Supermarkets & Grocery Stores, Specialty Food Stores, Fast-Food Stores and Selected Personal Services. The population of the Northern Shepparton Subregion supports approximately 15,100 sqm of such space in 2016. As at 2031, the supportable space may be approximately 18,700 sqm.
- d. Assuming the Shepparton North Centre captures a share of this space - say 50% of Supermarkets & Grocery Stores and 60% of the other nominated sectors, and an additional allowance for passing trade and capture from external areas is made at approximately 20% - retail floorspace need at the location is approximately 9,600 sqm in 2016 increasing to approximately 11,900 sqm by 2031.
- e. According to this market share assumption, the current need is estimated as +3,000 sqm additional space in 2016 sqm increasing to +5,300 sqm by 2031. This also assumes that the Northern Shepparton Subregion has approximately 6,600 sqm of such space at the current time.

### 31. Retail Demand and Need Metrics

Year	2016	2021	2026	2031
Revised Forecast (98.3% of Forecast ID)	22,445	23,931	25,452	26,943
Indicative Supportable Retail Floorspace SQM	49,379	53,246	57,266	61,295
<b>Allocating Space to Study Area:</b>				
Typical Neighbourhood Retail Sectors (SQM)				
Supermarkets & Grocery Stores	8,879	9,575	10,298	11,022
Specialty Food Stores	2,092	2,256	2,427	2,597
Fast-Food Stores	1,930	2,081	2,238	2,395
Selected Personal Services	2,168	2,338	2,515	2,692
Total of Above	15,070	16,250	17,477	18,707
Estimated Reasonable Share to Location (SQM)				
Supermarkets & Grocery Stores 50%	4,440	4,787	5,149	5,511
Specialty Food Stores 60%	1,255	1,354	1,456	1,558
Fast-Food Stores 60%	965	1,040	1,119	1,198
Selected Personal Services 60%	1,301	1,403	1,509	1,615
Total of Above	7,961	8,584	9,233	9,882
20% Allowance for Capture from Beyond PTA (SQM)				
Supermarkets & Grocery Stores	5,328	5,745	6,179	6,613
Specialty Food Stores	1,506	1,624	1,747	1,870
Fast-Food Stores	1,158	1,249	1,343	1,437
Selected Personal Services	1,561	1,684	1,811	1,938
Total of Above	9,553	10,301	11,079	11,859
<b>Estimated Existing Floorspace in Shepparton North</b>				

Supermarket - Fairleys IGA	3,500			
Local Shops - All Locations in PTA	3,100			
<b>Total of Above</b>	<b>6,600</b>			
Indicative Additional Need for Shepparton North				
Supermarkets & Grocery Stores	1,828	2,245	2,679	3,113
Local Shops	1,126	1,456	1,800	2,145
<b>Total of Above</b>	<b>2,953</b>	<b>3,701</b>	<b>4,479</b>	<b>5,259</b>

**32. There are two current retail development proposals for the Shepparton North subregional centre as identified in CACS, the Lascorp proposal on Ford Road and the 18 Pty Ltd proposal within the existing Commercial 1 zone.**

### **33. Retail Development Proposals**

Proposed New Supply	
<b>Lascorp (Requires Rezoning C193)</b>	
Supermarket	3,960
Speciality Retail	2,030
<b>Total Retail</b>	<b>5,990</b>
Other Uses	400
Total	6,390
<b>18 Pty Ltd (Commercial 1 Zone)</b>	
Supermarket	3,470
Speciality Retail	2,080
<b>Total Retail</b>	<b>5,550</b>
Other Uses	600
Total	6,150

**34. Either of the development proposals would satisfy the estimated indicative need at the Shepparton North location to 2031.**

**35. Allowing both proposals to be provided would require the location to achieve a high market share for supermarket activity. As noted above, the Northern Shepparton Subregion population supports approximately 15,100 sqm of such space in 2016. As at 2031, the supportable space may be approximately 18,700 sqm. Allowing both proposals in addition to existing space would deliver approximately 18,100 sqm of such space.**

**36. Allowing both proposals to proceed - and assuming both were provided - would not challenge the higher-order role of the Shepparton CBD because the proposals do not include department stores.**

**37. In terms of location and design matters, I believe that that the typical optimal outcome is a consolidated walkable centre co-located with the existing Commercial 1 Zone. However in the context, the CACS takes a pragmatic approach to stimulate competition in the land and**

retail market by identifying a larger precinct for expansion in recognition of the fact that land in the existing Commercial 1 zone is controlled by one party and the catchment is primarily car-based. The designation of the larger precinct in CACS has had the effect of stimulating competition in the Shepparton North area.

38. Allowing both proposals to proceed - and assuming both were provided - would compete with the CBD and other locations for supermarket activity. The additional 7,430 sqm of supermarket space may seek to achieve expenditure around \$50m to \$60m. If this is achieved, the expenditure would need to be sourced from the Northern Shepparton Subregion and beyond.
39. The impact on the CBD and other locations would depend on a range of factors such as the appeal of shops to customers, in terms of accessibility, amenity and quality and value of goods and services provided. The pattern of impact is not able to be measured with certainty.
40. Indicatively the supermarket impact on the CBD could be in the order of -\$25m to -\$30m if it is assumed that approximately half the expenditure is taken from the CBD. This impact would be isolated to one retail sector (i.e. supermarkets and groceries) and would not threaten the broader role of the CBD. Within the supermarket and grocery sector, the impact would be distributed across a number of stores. The reduction of turnover for each of the existing supermarkets could be in the vicinity of -\$8m, which diminishes over time as the market grows. This scale of short term impact is unlikely to generate a risk of supermarket store closures in the CBD.
41. Other possibilities include the CBD and other locations out-competing the new space in Shepparton North, and thus the new space achieves a low turnover.
42. Another possibility is that one of the proposals, if both are approved and established, does not proceed because of uncertain market potential.
43. CACS and the analysis shown here suggest that the Shepparton North location has a need for more local shop or speciality retail space.
44. In my opinion there will be no material impact on local shops as a result of either or both of the development proposals. The proposed local shops are nominated to perform a local convenience function within the Northern Shepparton Subregion.
45. It is concluded that:
  - a. Shepparton North has a need for more retail space and services.
  - b. The proposed developments would expand the range of jobs, services and goods offered in the Northern Shepparton Subregion and will facilitate competition for the benefit of the population.
  - c. A need for more than two supermarkets in the Northern Shepparton Subregion is unlikely to be needed within a 2031 timeframe.

- d. If three supermarkets are provided, the impacts would be dispersed across the region and be focused on supermarket facilities, including the proposed new facilities. It is unlikely that a centre will be put at risk of closure if three supermarkets are provided in Shepparton North.**
- e. The supermarket-based proposals at Shepparton North would not challenge the higher-order role of the Shepparton CBD because the proposals do not include department stores.**

## 3. RESPONSE TO SUBMISSIONS

### 3.1 C192 COMMERCIAL ACTIVITY CENTRES STRATEGY

**46. My summary of key points made by submitters in relation to the exhibited C192 documents in relation to retail and activity centre planning matters is shown below. I also provide an opinion to those points.**

No	Submission	Summary of Key Points	My Opinion
1	<b>McCamish Properties</b> 5 May 2017	There is a strong need for national chain supermarket and supporting shops / services in Shepparton north.	Noted.
2	<b>IGA Retail Services</b> 30 May 2017	Lack of strategic justification with no adopted Structure Plan in place regarding Lascorp site.	CACS provides a strategic framework for retail and activity centres.
3	<b>Lascorp</b> 30 May 2017	Proposed amendment will result in a net community benefit for the Shepparton North community.	I agree that more retail services and employment is required in Shepparton North.
4	<b>CIRR (on behalf of resident)</b> 30 May 2017	The concept of walkability and concentrated retailing is ignored in the amendment, and a twin anchor centre is a suboptimal planning outcome.	I agree that the typical optimal outcome is a consolidated walkable centre co-located with the existing Commercial 1 Zone. However in the context the CACS takes a pragmatic approach to stimulate competition in the land and retail market and this has had the effect of generating two proposals in the Shepparton North area.
5	<b>CIRR (on behalf of resident)</b> 30 May 2017	There is a current oversupply of retail floorspace in Shepparton North and the amendment will exacerbate this situation.	I disagree with this point. Refer to the benchmark analysis shown earlier in this statement.
6	<b>CIRR (on behalf of resident)</b> 30 May 2017	The primacy of the Shepparton CBD must be protected and the amendment will result in a negative impact on retailing in the	I agree that the primacy of the Shepparton CBD must be protected.

		CBD and an undermining of that primacy.	Refer to section 2 of this statement for details regarding my opinion on role and impacts.
7	<b>Centrum Town Planning</b> 30 May 2017	Increase the likelihood of undesirable land use and development in a fragmented activity centre.	As noted above in submission 4 of this statement, I agree that an optimal outcome is a consolidated walkable centre co-located with the existing Commercial 1 Zone.  There is no information to suggest land uses will be undesirable.
8	<b>Centrum Town Planning</b> 30 May 2017	There is a lack of available land around the Lascorp site for the attraction of other commercial businesses or for future expansion.	I have not investigated this point.
9	<b>Boulevard Corporation</b> 20 June 2017	The proposed amendment will provide important services and facilities to a growing residential community in the northern part of Shepparton.	I generally agree.

## 3.2 C193 SHEPPARTON NORTH

**47. My summary of key points made by submitters in relation to the exhibited C193 documents in relation to retail and activity centre planning matters is shown below. I also provide an opinion to those points.**

No	Submission	Summary of Key Points	My Opinion
10	<b>Centrum Town Planning</b> 5 August 2016	Support provided for the designation of Shepparton North as a Subregional Activity Centre.	Noted.
11	<b>Centrum Town Planning</b> 5 August 2016	More clarity on CACS policy and Planning Scheme provisions is required.	This is a matter for Council.
12	<b>Dexus</b> 8 August 2016	The proposed cap of 22,500sqm for Shepparton Marketplace is	Beyond the analysis in CACS (in relation to 22,500 sqm of

		<p>inadequate and, in any respect, this figure should only be applied to 'shop' uses rather than the broader land use term of 'retail premises'.</p>	<p>floorspace) I have not seen any supporting analysis for 30,000 sqm of floorspace provision at Shepparton Marketplace.</p> <p>Application of a floorspace cap to 'shop' as opposed to 'retail' will enable more floorspace to be provided at the location however the increase is unlikely to affect the intended role of the centre (at an approximate 22,500 sqm) in a material way.</p>
13	<p><b>Dexus</b> 8 August 2016</p>	<p>There are general provisions throughout the ACZ1 that seek to discourage 'department stores and 'cinemas' from locating out of the retail core (Precinct 1). Shepparton Marketplace in its role as a Regional Centre is capable of supporting a range of retail, office, service and hospitality uses, including department stores and cinemas, without compromising the primacy of the Shepparton CBD or the activity centre hierarchy.</p>	<p>I generally agree that as a Regional Centre a mix of uses could be accommodated at the location.</p> <p>It is my understanding that CACS has sought to strike a balance between enabling growth at Shepparton Marketplace and drawing a line on size and uses to protect the primacy of the CBD.</p>
14	<p><b>Dexus</b> 8 August 2016</p>	<p>There is a point of difference between the mall based format of the Shepparton Marketplace to the street based experience of the Shepparton CBD which should be acknowledged in these guidelines, as some larger 'anchor' retailers may be more suited to a mall based format and should not be discouraged from locating within Shepparton Marketplace expressly for the reason that they are unable to, or have viable reasons for not wanting to locate within Precinct 1.</p>	<p>I agree that there is a difference in offer between the centres but this difference is not absolute. Large format stores can locate in the CBD.</p>

15	<b>Deep End</b> 29 September 2016	An expansion of the Shepparton Marketplace to 30,000sqm of shop floorspace could be achieved and the cap should be modified in CACS, Precinct 9.	Beyond the analysis in CACS (in relation to 22,500 sqm of floorspace) I have not seen any supporting analysis for 30,000 sqm of floorspace provision at Shepparton Marketplace.
16	<b>CIRR (on behalf of resident)</b> 8 August 2016	The concept of walkability and concentrated retailing is ignored in the amendment, and a twin anchor centre in Shepparton North is a suboptimal planning outcome.	Refer to response to submission 4 of this statement.
17	<b>CIRR (on behalf of resident)</b> 8 August 2016	There is a current oversupply of retail floorspace in Shepparton North and the amendment will exacerbate this situation.	Refer to response to submission 5 of this statement.
18	<b>CIRR (on behalf of resident)</b> 8 August 2016	The primacy of the Shepparton CBD must be protected and the amendment as it relates to Shepparton North will result in a negative impact on retailing in the CBD and an undermining of that primacy.	Refer to response to submission 6 of this statement.
19	<b>Metcash Supermarkets</b> 5 August 2016	Enough land exists at the Fairley's IGA site to accommodate the additional floorspace requirement as set out in CACS.	This may be true to some extent however it is my understanding that CACS has taken a pragmatic position to designate a larger rather than smaller area in order to stimulate competition and avoid the risk of land being monopolised and withheld from development to the detriment of the community.
20	<b>Metcash Supermarkets</b> 5 August 2016	The assumption of CACS is that customers tend to shop at their nearest supermarket, however this behaviour does not necessarily hold true for Shepparton with customers prepared to drive past other supermarkets to get to their preferred centre.	This comment supports the approach in CACS, which in my opinion, takes a pragmatic approach to stimulate competition in the land and retail market and this has had the effect of generating two proposals in the Shepparton North area.



<b>21</b>	<b>Metcash Supermarkets</b> 5 August 2016	A two node activity centre in Shepparton North is a suboptimal planning outcome.	Refer to response to submission 4 of this statement.
<b>22</b>	<b>Aventus Property</b> 8 August 2016	A change of zoning from C2Z to ACZ at the Shepparton Home Central would preclude the ability to develop supermarket and office at the site in the future. It is requested that a neutral translation is made from the current controls and supermarket is retained as a Section 2 use. It is also requested that Office (including Medical Centre) is retained as a Section 1 use accompanied by an appropriate floorspace cap.	This is a Planning Scheme matter that I have not investigated.
<b>23</b>	<b>Debra Butcher Consulting (representing Lascorp)</b> 8 August 2016	Strong support for the amendment, particularly as it relates to Shepparton North.	Noted.

## 4. CONCLUSION AND DECLARATION

**48. I provide this statement for the benefit of the Panel.**

**49. I have made all the inquiries that I believe are desirable and appropriate and no matters of significance which I regard as relevant have, to my knowledge, been withheld from the Panel.**

A handwritten signature in black ink, appearing to read 'Alex Hrelja', with a stylized, cursive script.

**Alex Hrelja**

**Principal, Hill PDA Pty Ltd**

**17 July 2017**

# APPENDIX 1 – ALEX HRELJA CV

## Principal, HillPDA

- Master of Business (Property) (RMIT University)
- Master of Urban Planning (University of Melbourne)
- Bachelor of Planning and Design (First Class Honours) (University of Melbourne)
- Member Planning Institute of Australia
- Corporate Member Urban Development Institute of Australia (Victoria)

Alex manages HillPDA's Melbourne office. Alex is a specialist in property economics, urban economics, strategic planning and economic development and has over 22 years of consultancy experience in those fields.

Alex has worked across Australia in his fields of expertise. Clients include local, state and Commonwealth governments, developers and infrastructure agencies. Much of his work is based on an expert understanding of regional economic and social patterns and drivers, reviewing supply side conditions and forecasting demand conditions for specific projects to complex urban and regional development areas. His work ranges from feasibility studies for specific sites through to regional urban economic plans for all land use sectors, such as growth corridor economic plans.

His specific areas of expertise are:

- Property Advisory and Feasibility Studies
- Strategic Land Use Planning
- Economic Development
- Market Research and Demand Studies
- Urban Economics for Growth Areas and Activity Centres
- Retail Economics and Impact Studies
- Industrial Land Strategies
- Community Facility Provision Plans
- Infrastructure Funding and Developer Contributions

Prior to joining HillPDA, Alex was a Director of an urban economics consultancy firm for eight years. He has also worked in research roles in higher education and in strategic planning and economic development roles within public agencies.

Alex received a Planning Institute of Australia (Victoria Division) President's Award for the Population Futures Scoping Paper conducted for the Australian Academy of Sciences and Business Council of Australia. Alex regularly speaks at conferences and publishes journal papers on matters relating to property and planning. Recent examples include presentations on Market Risk to the Property Council of Australia development course.

A sample of project experience is shown below.

- Review of Shepparton North Retail Proposal, Greater Shepparton City Council
- Preliminary Opinion - Shepparton Marketplace Expansion Proposal, Greater Shepparton City Council
- Plumpton and Kororoit - Retail and Employment Land Assessment, Victorian Planning Authority
- Sunbury PSP74 and PSP75 Retail and Economic Assessment, Metropolitan Planning Authority
- Assessment of 45 Neighbourhood Activity Centres, City of Greater Dandenong
- Armstrong Creek Urban Growth Area Economic Plan – Activity Centres and Industrial Areas, City of Greater Geelong
- Melton-Caroline Springs Growth Area Plan: Economic Consultancy, Department of Sustainability and Environment
- Hume Growth Corridor Economic Study, Department of Sustainability and Environment
- Job Possibilities and Targets at Maribyrnong Defence Site, Places Victoria (VicUrban)
- Mount Peter Structure Plan: Economic Analysis and Planning, Cairns Regional City Council
- WestConnex Corridor Economic and Land Use Analysis, Urban Growth NSW
- Camberwell Junction Structure Plan Review – Economic and Property Analysis, Boroondara City Council
- Hume City Retail Strategy, Hume City Council
- Berwick Waterways PSP Retail and Activity Centre Assessment, Keystone Design and Build Pty Ltd
- Economic Assessment of Greenvale Lakes Activity Centre Development Proposal, Hume City Council
- Diggers Rest Commercial and Industrial Analysis, Growth Areas Authority
- Castlemaine Commercial Centre Study, Mount Alexander Shire Council
- Swanston Street Retail Prospects Study, City of Melbourne
- Sunbury Activity Centre Analysis, Hume City Council
- Craigieburn Restricted Retail & Showroom Precinct Demand Analysis, Growth Areas Authority
- Activity and Retail Review of Wyndham, Department of Planning and Community Development

# APPENDIX 2 – CACS RECOMMENDATIONS FOR SHEPPARTON NORTH

Summary of CACS Directions for Shepparton North (Selected Extracts and or Summaries of Passages):

- Shepparton North must be enhanced over time through the expansion of retail and commercial facilities consistent with the centre's subregional role in the Shepparton activity centre hierarchy.
- Growth of the Shepparton North centre will consolidate an existing retail and commercial precinct, and generate community benefits related to shared infrastructure and business synergies.
- Although retaining a contiguous area of land in the Commercial 1 Zone is a preferred outcome, the potential for expansion on other available sites in the area between Ford Road and Hawkins Street may be required to achieve the required growth in retail and commercial activity.
- The expansion could include the addition of a second full-line supermarket and enhanced supporting retail (not including a major non-food retail anchor such as a discount department store).
- In indicative terms, an increase of 6,000 sqm in shop floorspace may be supported on land outside the existing Commercial 1 Zone at Shepparton North, which is sufficient to accommodate a second supermarket and supporting retail such as specialty shops. This should be subject to detailed assessment.
- An appropriate site in the area fronting the Goulburn Valley Highway between Ford Road in the north and Hawkins Street in the south can be endorsed for this extension to the Commercial 1 Zone.
- Develop an urban design framework that provides appropriate guidance on how the centre can develop in a manner that provides a high level of amenity to shoppers.
- Allow for the development of a small local centre in association with the new North-East residential growth area. This centre will meet local convenience needs only, and will not include uses (such as a full-line supermarket) that would be more appropriately located in the Shepparton North centre.
- Discourage new shop tenancies above 4,000sqm in size in order to provide greater certainty to Council in terms of potential impacts on the CBD associated with the relocation of retail anchors.
- Discourage cinema and cinema-based entertainment facilities.

Source: Greater Shepparton Commercial Activity Centres Strategy, November 2015