

PROPERTY ECONOMICS



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Whakatane Commercial Land Assessment

WHAKATANE DISTRICT COUNCIL

## SCHEDULE

Code	Date	Information / Comments	Project Leader
003	Nov 2009	Report	Philip Osborne

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## 1. INTRODUCTION

Property Economics has been engaged by Whakatane District Council to undertake a commercial land assessment for the main urban area of Whakatane and immediate surrounds.

This includes an assessment of the current business land supply in terms of its quantum, location and quality. As well as how this reconciles with the estimated future demand for business land and how any differential may impact upon Whakatane's ability to compete in the wider economy not only for new business but to maintain their current level of activity.

Also included in this report are the estimated requirements of 'specialty' retail in terms of amount and preferred location.

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## 2. CURRENT BUSINESS ENVIRONMENT

### 2.1. EMPLOYMENT STRUCTURE

Table 1 below illustrates the current (2008) business employment data, by sector, for the Whakatane and Kawerau Districts. It is important to address both districts given they influence each others business environments and employment structures.

Both districts are comprised of a high level of industrial sector employment with manufacturing and construction representing over 25% of all business employees. Of the business activity that would typically locate in commercial areas, the leading sectors within the Whakatane and Kawerau Districts include those representing primarily public sector businesses with Education, Public Administration and Healthcare.

Although a significant proportion of these activities have dedicated sites and zonings, small providers often locate in the commercial areas associated with the town centre to cluster near other commercial activities and areas of higher levels of amenity.

TABLE 1: WHAKATANE & KAWERAU EMPLOYMENT DATA (NEW ANZSIC CODES)

<u>2006 ANZSIC Categories</u>	<u>2008</u>
C Manufacturing	2,560
D Electricity, Gas, Water and Waste Services	180
E Construction	1,150
F Wholesale Trade	280
G Retail Trade	2,000
H Accommodation and Food Services	800
I Transport, Postal and Warehousing	350
J Information Media and Telecommunications	176
K Financial and Insurance Services	265
L Rental, Hiring and Real Estate Services	215
M Professional, Scientific and Technical Services	440
N Administrative and Support Services	580
O Public Administration and Safety	680
P Education and Training	1,960
Q Health Care and Social Assistance	1,570
R Arts and Recreation Services	166
S Other Services	690
<b>Total</b>	<b>14,062</b>

Source: Statistics NZ

Table 2 compares the districts three townships and their current commercial employment composition. In 2008 the Whakatane commercial area accommodated over 65% of the total commercial activity within the identified sectors with Healthcare, Public Services and ITC heavily represented. Of interest also is the representation of support services in Edgecumbe, this is based on the location of Fonterra and also the relatively low land property costs.

TABLE 2: COMMERCIAL AREA ACTIVITY BREAKDOWN (2008)

2006 ANZSIC Categories	TOTAL	WHAKATANE	Proportion	KAWERAU	EDGECEUMBE
J Information Media and Telecommunications	176	173	98%	6	0
K Financial and Insurance Services	265	200	75%	36	0
L Rental, Hiring and Real Estate Services	215	138	64%	47	6
M Professional, Scientific and Technical Services	440	330	75%	36	21
N Administrative and Support Services	580	301	52%	79	165
O Public Administration and Safety	680	525	77%	104	18
P Education and Training	1,960	975	50%	301	107
Q Health Care and Social Assistance	1,570	1,294	82%	45	24
R Arts and Recreation Services	166	98	59%	3	0
<b>Total</b>	<b>6,052</b>	<b>4,034</b>	<b>67%</b>	<b>657</b>	<b>341</b>

Table 3 outlines the growth in both the Whakatane and Kawerau Districts for commercial employment activity between 2000 and 2008. It shows a proportionately large increase in the level of support service workers and a nominally large increase in education and training. It is important to note that a significant proportion of the education employment growth will be accommodated in areas that are not commercial areas, such as primary, secondary and tertiary schools.

TABLE 3: COMMERCIAL ACTIVITY CHANGES 2000 - 2008

2006 ANZSIC Categories	WHAKATANE	KAWERAU
J Information Media and Telecommunications	20	13%
K Financial and Insurance Services	100	83%
L Rental, Hiring and Real Estate Services	60	55%
M Professional, Scientific and Technical Services	100	32%
N Administrative and Support Services	270	117%
O Public Administration and Safety	150	36%
P Education and Training	450	38%
Q Health Care and Social Assistance	-10	-1%
R Arts and Recreation Services	50	45%
<b>Total</b>	<b>1,190</b>	<b>29%</b>

Figure 1 illustrates the distribution of this commercial activity throughout the Whakatane and Kawerau Districts. As would be expected it shows a concentration of activity in Whakatane central, and also in Kawerau. Over 80% of commercial activity in the catchment lies within the Whakatane, Kawerau and Edgumbe centres. The reasons for this are fairly obvious both from a cause and effect point of view.

First, these areas are the focal points for the primary markets in this area. Whakatane itself comprises two thirds of the commercial market due to the fact that there is little to no critical mass or support services readily available in any other location. Due to this fact this is where the vast majority of commercial land is supplied. It is unlikely that this situation will change in the short or medium term. Due to this it is expected that much of the growth anticipated, and required to be facilitated, will be accommodated within the Whakatane town centre and immediate surrounds.

FIGURE 1: TOTAL CATCHMENT COMMERCIAL EMPLOYMENT ACTIVITY 2008

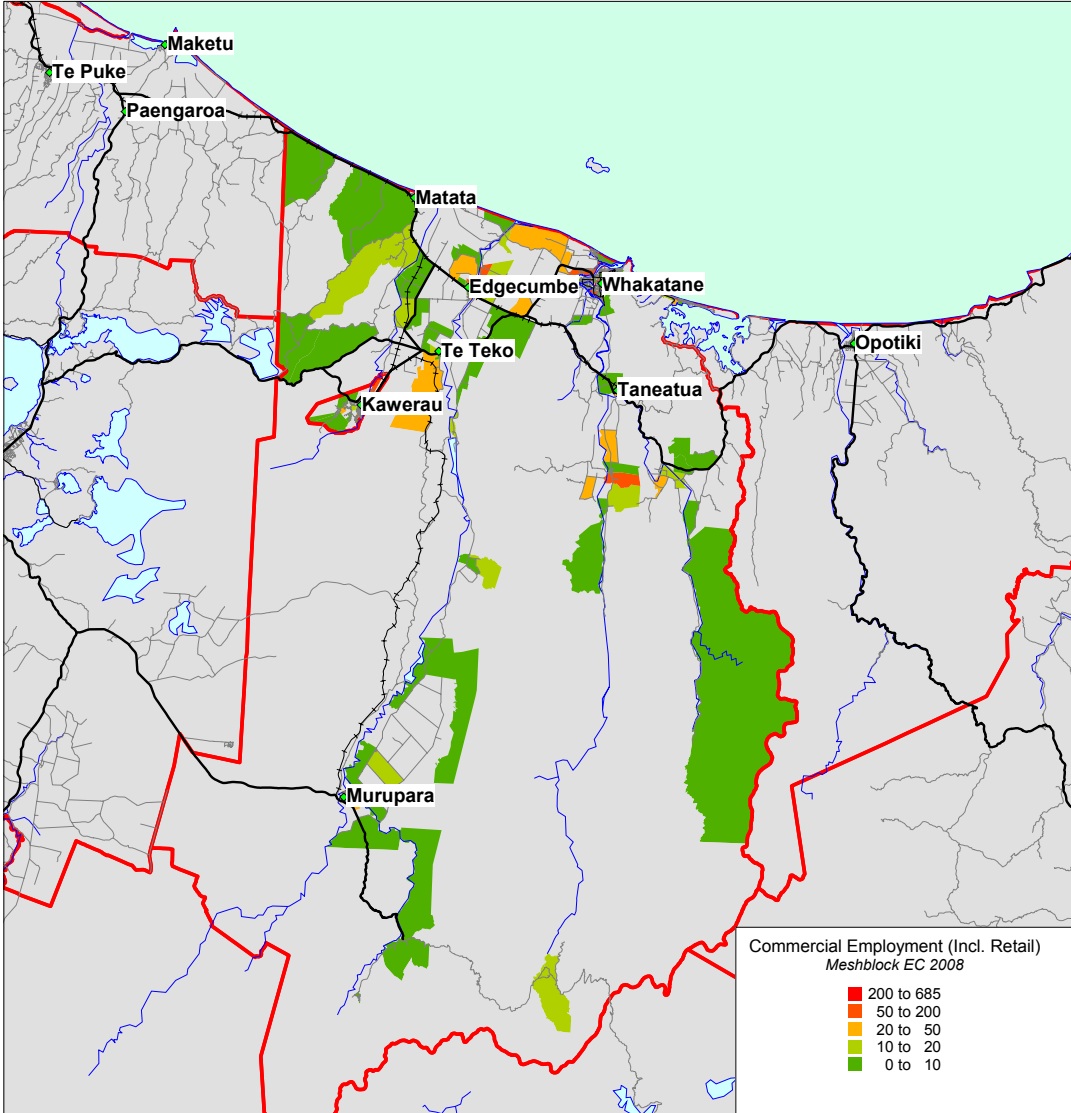


FIGURE 2: WHAKATANE CENTRAL COMMERCIAL EMPLOYMENT ACTIVITY 2008

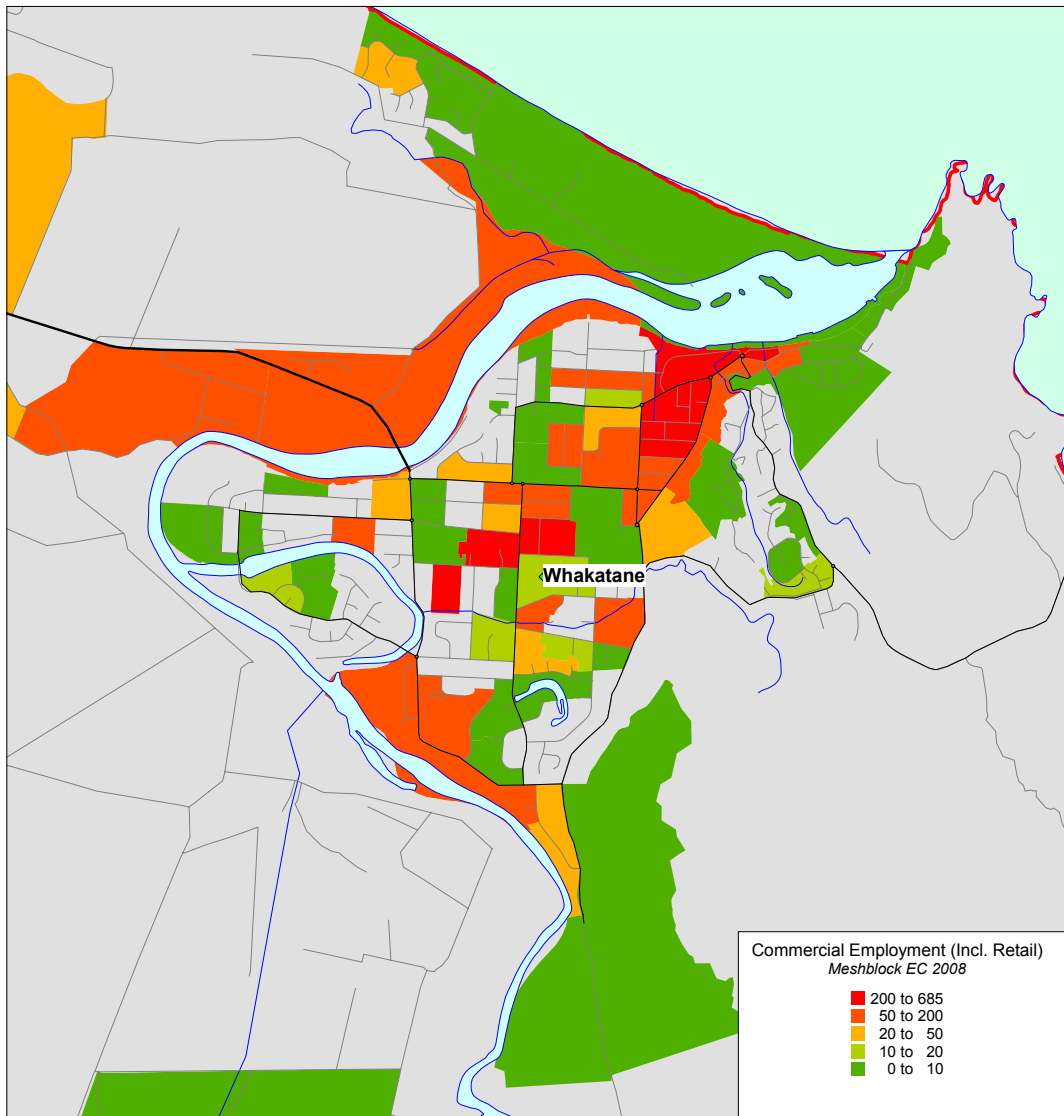
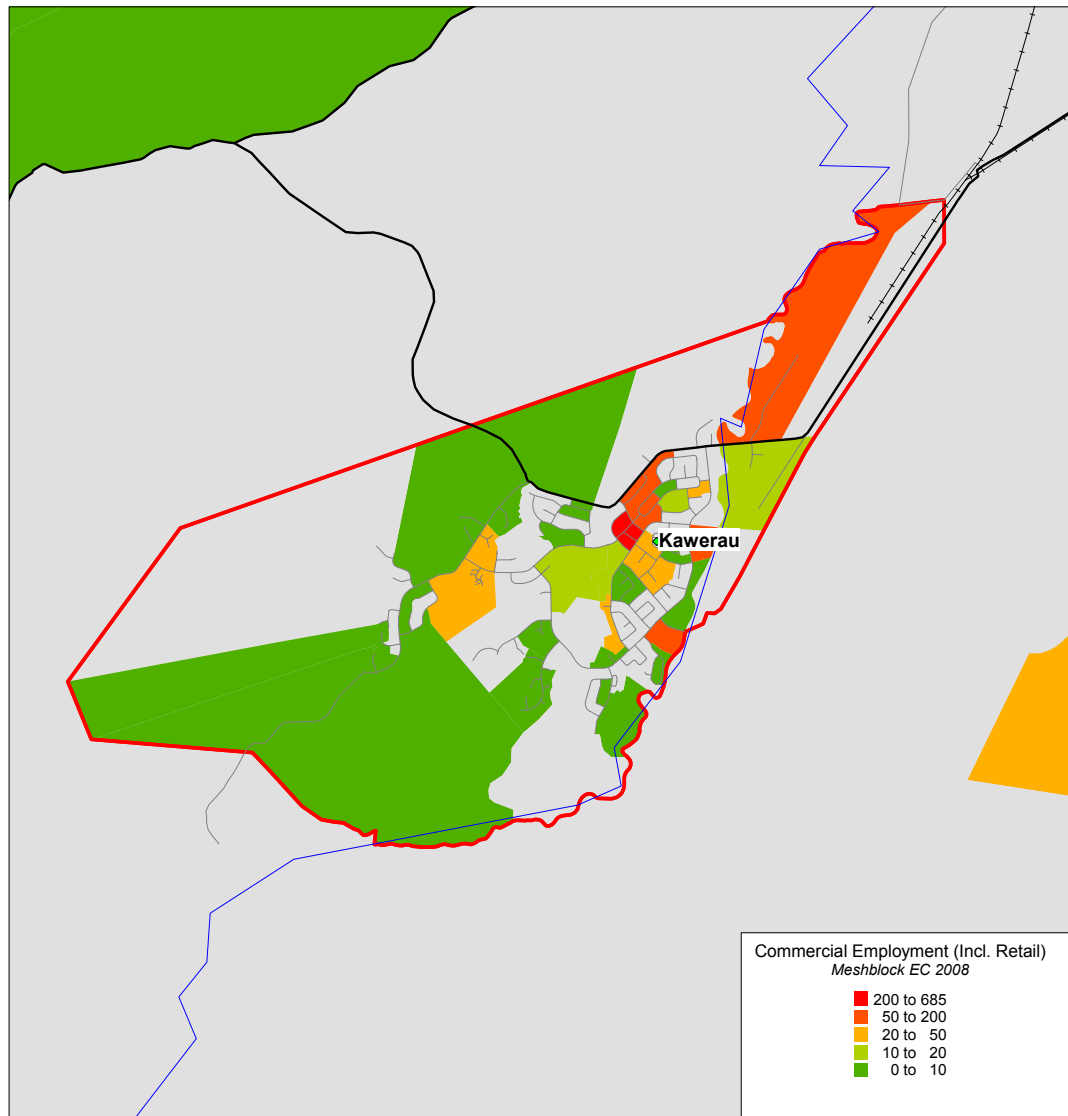


Figure 2 shows the current distribution of commercial activity throughout the Whakatane central area. It illustrates a concentration of activity around Commerce St / Strand, Goulstone Rd and Mill Rd / SH 30. These areas have also seen a preponderance of growth locating here over the past 8 years.

Access for commercial locations is crucial and as such State Highway 30 has become a location with excellent access to the market as well as supplies and offers a significant level of profile. It is important however that this location is tempered with the need to facilitate and sustain the same level of profile for the District in the CBD.



FIGURE 3: KAWERAU COMMERCIAL EMPLOYMENT ACTIVITY 2008



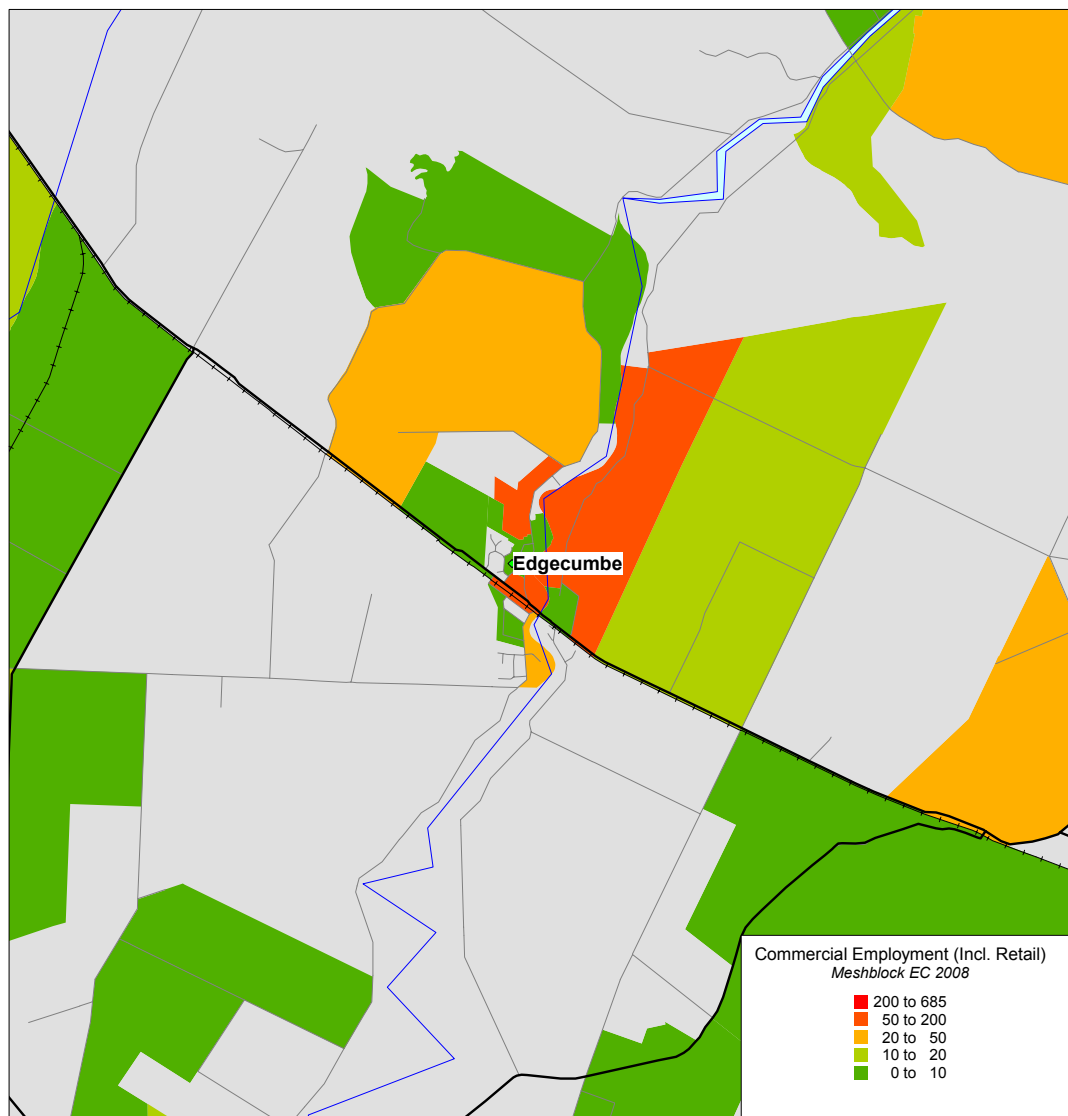
The distribution of commercial activity in Kawerau is illustrated above. This centre represents only slightly more than 10% of the commercial activity in the area and is unlikely to accommodate proportionately more growth in the future. Most of the commercial activities located here are specific support services for industry and as such only a concerted effort to increase this activity will result in significant increases in commercial business demand.

Given the level of facilities and infrastructure, it would be unwise for Whakatane to encourage any level of commercial development here beyond that needed to provide this support. Although this may result in some level of employment displacement it is likely to

be compensated for through corresponding increases in productivity and amenity for the intensification of this activity in the Whakatane centre.

Kawerau itself has some critical mass in regard to Education and should potentially focus on this as a potential hub. Given the level and localized nature of this activity it is unlikely that this area will need any significant level of commercial land supply in the medium term.

FIGURE 4: EDGE CUMBE COMMERCIAL EMPLOYMENT ACTIVITY 2008



At approximately 6% of commercial activity, Edgecumbe also represents a base of industry support services (this sector is heavily represented at almost half of the commercial activity in the area). Similar to Kawerau this catchment is unlikely to grow significantly in the short to medium term without dramatic increases in industrial activity in the area.

Given this township's dependence on several larger producers there is also potential concern that this form of business activity may reduce as services are rationalized. Given these factors it is important that areas such as this in the wider area focus of more land intensive industrial activities for which to target growth and allow the Whakatane CBD to provide a more competitive environment for commercial activity.

## 2.2. LANDING ROAD ASSESSMENT

TABLE 4: EMPLOYMENT GROWTH LANDING ROAD 2000 - 2008

	2000	2001	2002	2003	2004	2005	2006	2007	2008	Growth 2000-2008
A Agriculture, Forestry and Fishing	6	0	0	0	0	0	0	0	9	3
B Mining	0	0	0	0	0	0	0	0	0	0
C Manufacturing	0	0	0	0	3	3	3	9	6	6
D Electricity, Gas, Water and Waste Services	0	0	0	0	0	0	0	0	0	0
E Construction	9	3	3	3	0	6	9	12	24	15
F Wholesale Trade	18	18	18	21	21	21	21	18	18	0
G Retail Trade	26	31	45	45	42	29	35	46	37	11
H Accommodation and Food Services	67	66	57	58	64	77	89	39	39	-28
I Transport, Postal and Warehousing	9	0	6	6	9	9	12	6	6	-3
J Information Media and Telecommunications	0	0	0	0	0	0	0	0	0	0
K Financial and Insurance Services	6	6	6	6	6	6	6	6	6	0
L Rental, Hiring and Real Estate Services	0	0	0	9	18	24	24	21	24	24
M Professional, Scientific and Technical Services	6	15	15	18	21	21	15	39	42	36
N Administrative and Support Services	0	0	0	0	0	0	0	40	45	45
O Public Administration and Safety	0	0	0	0	0	0	0	0	0	0
P Education and Training	56	71	58	61	63	88	83	81	126	70
Q Health Care and Social Assistance	33	35	118	276	76	23	34	32	35	2
R Arts and Recreation Services	0	0	0	0	0	0	0	0	3	3
S Other Services	21	23	21	21	23	23	26	26	26	5
<b>Total All Industries</b>	<b>257</b>	<b>268</b>	<b>347</b>	<b>524</b>	<b>346</b>	<b>330</b>	<b>357</b>	<b>375</b>	<b>446</b>	<b>189</b>

As part of the study, WDC requested information showing the changing land use patterns and activities occurring along Landing Road, Whakatane.

Table 4 displays the employee count for both sides of Landing Road from 2000 to 2008. Employee count is defined as head count of salary and wage earners, which include both full-time and part-time workers.

Total employment in this area has increased by 189 between 2000 and 2008, representing growth of 74%. Sectors with highest nominal growth are Education & Training, Administrative & Support Services and Professional, Scientific & Technical Services, these three sectors account for approximately 80% of the total growth. Two sectors with negative growth are Accommodation & Food Services and Transport, Postal & Warehousing.

Being a major arterial road in Whakatane, commercial activity has been, and will continue to be, drawn to Landing Road due to its easy accessibility, good exposure / profile, and slightly cheaper rent compared to the town centre alternative. Commercial activity being developed on major arterial roads is a common thread experienced by cities and provincial centres right around the country, particularly over the last 10 years where solid economic growth meant demand outstripped the supply of appropriately located commercial space.

TABLE 5: BUSINESS UNITS GROWTH LANDING ROAD 2000 - 2008

	2000	2001	2002	2003	2004	2005	2006	2007	2008	Growth 2000-2008
A Agriculture, Forestry and Fishing	5	5	3	4	4	5	7	6	5	0
B Mining	0	0	0	0	0	0	0	0	0	0
C Manufacturing	3	4	6	6	5	5	5	7	8	5
D Electricity, Gas, Water and Waste Services	0	0	0	0	0	0	0	0	0	0
E Construction	11	9	4	6	7	6	9	14	15	4
F Wholesale Trade	3	2	2	2	2	3	4	3	2	-1
G Retail Trade	9	8	10	7	7	7	10	10	12	3
H Accommodation and Food Services	12	13	13	13	14	14	12	9	8	-4
I Transport, Postal and Warehousing	4	3	2	2	3	2	2	1	2	-2
J Information Media and Telecommunications	0	0	0	0	0	0	0	0	0	0
K Financial and Insurance Services	2	1	2	1	4	4	5	7	8	6
L Rental, Hiring and Real Estate Services	14	16	15	20	24	30	31	37	34	20
M Professional, Scientific and Technical Services	5	7	8	12	13	13	13	14	15	10
N Administrative and Support Services	1	2	1	2	3	0	1	1	1	0
O Public Administration and Safety	0	0	0	0	0	0	0	1	0	0
P Education and Training	4	5	5	5	5	6	6	6	6	2
Q Health Care and Social Assistance	15	15	17	13	13	11	10	11	11	-4
R Arts and Recreation Services	1	0	0	1	2	2	3	3	5	4
S Other Services	7	7	9	7	6	6	8	9	9	2
<b>Total All Industries</b>	<b>96</b>	<b>97</b>	<b>97</b>	<b>101</b>	<b>112</b>	<b>114</b>	<b>126</b>	<b>139</b>	<b>141</b>	<b>45</b>

Table 5 displays the number of geographic unit (GU) along Landing Road from 2000 to 2008. A geographic unit or business location is referred as a separate operating unit engaged in New Zealand in one, or predominantly one, kind of economic activity from a single physical location or base. Total number of GU across all sectors has grown by 45 from 2000 to 2008, representing percentage growth of 47%. The sectors with the most significant growth are Rental, Hiring & Real Estate Services, Professional, Scientific & Technical Services and Financial & Insurance Services. Together there are 36 new GU's in these three sectors, account for 80 of the growth. Accommodation & Food Services, Health Care & Social Assistance and Wholesale Trade have declined since 2000 in terms of the number of geographic units.

### 2.3. RETAIL ACTIVITY DISTRIBUTION

Although commercial activity often coincides with retail activity, it is important to distinguish between the two and understand where they are currently locating and therefore where they are likely to locate in the future. Similar to Figure 2, the distribution of retail activities shows the same pattern around the Whakatane CBD. Although slightly more concentrated accessibility is obviously a primary consideration with this activity with an increase amount locating in areas on accessible routes such as SH30.

FIGURE 5: WHAKATANE CENTRAL RETAIL EMPLOYMENT ACTIVITY 2008

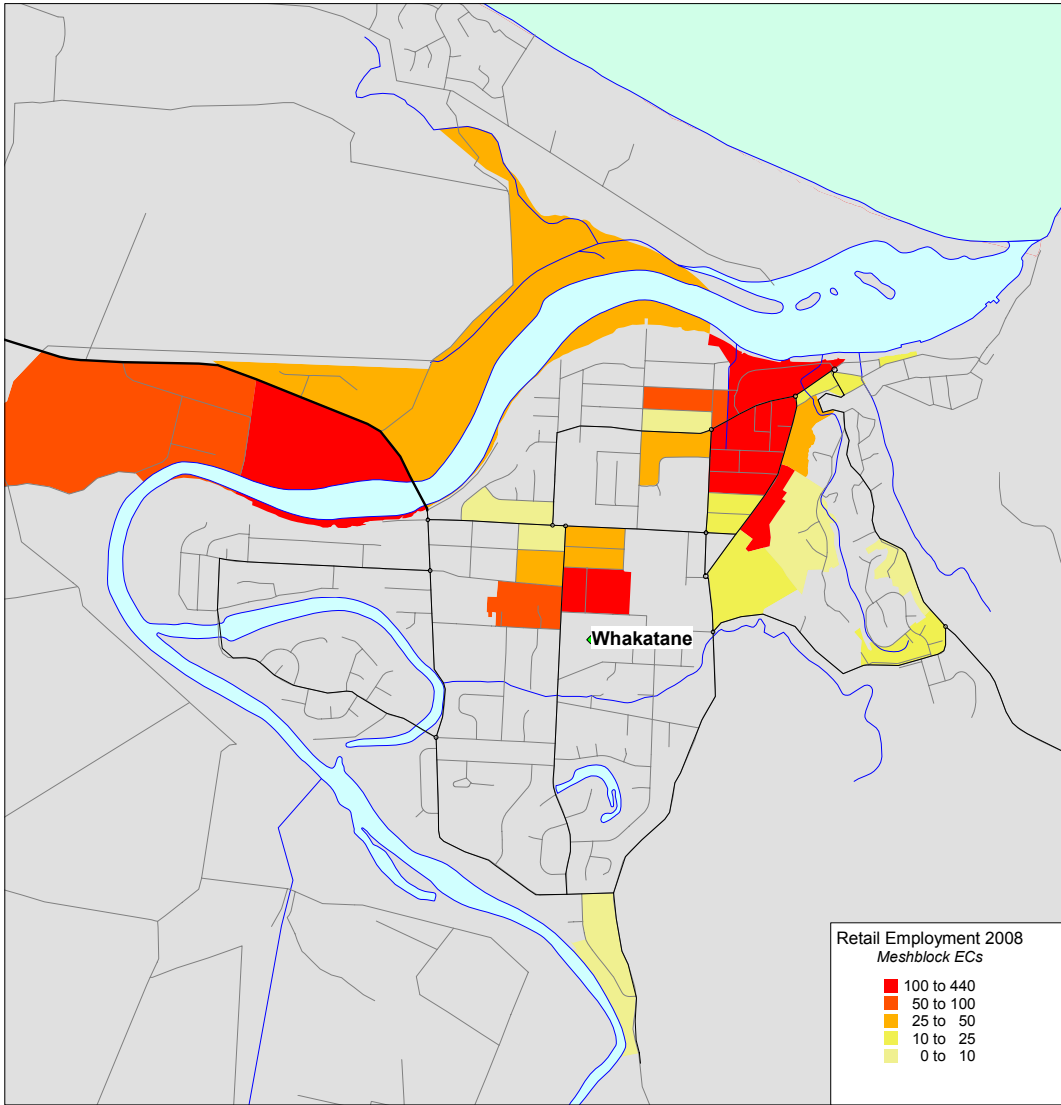
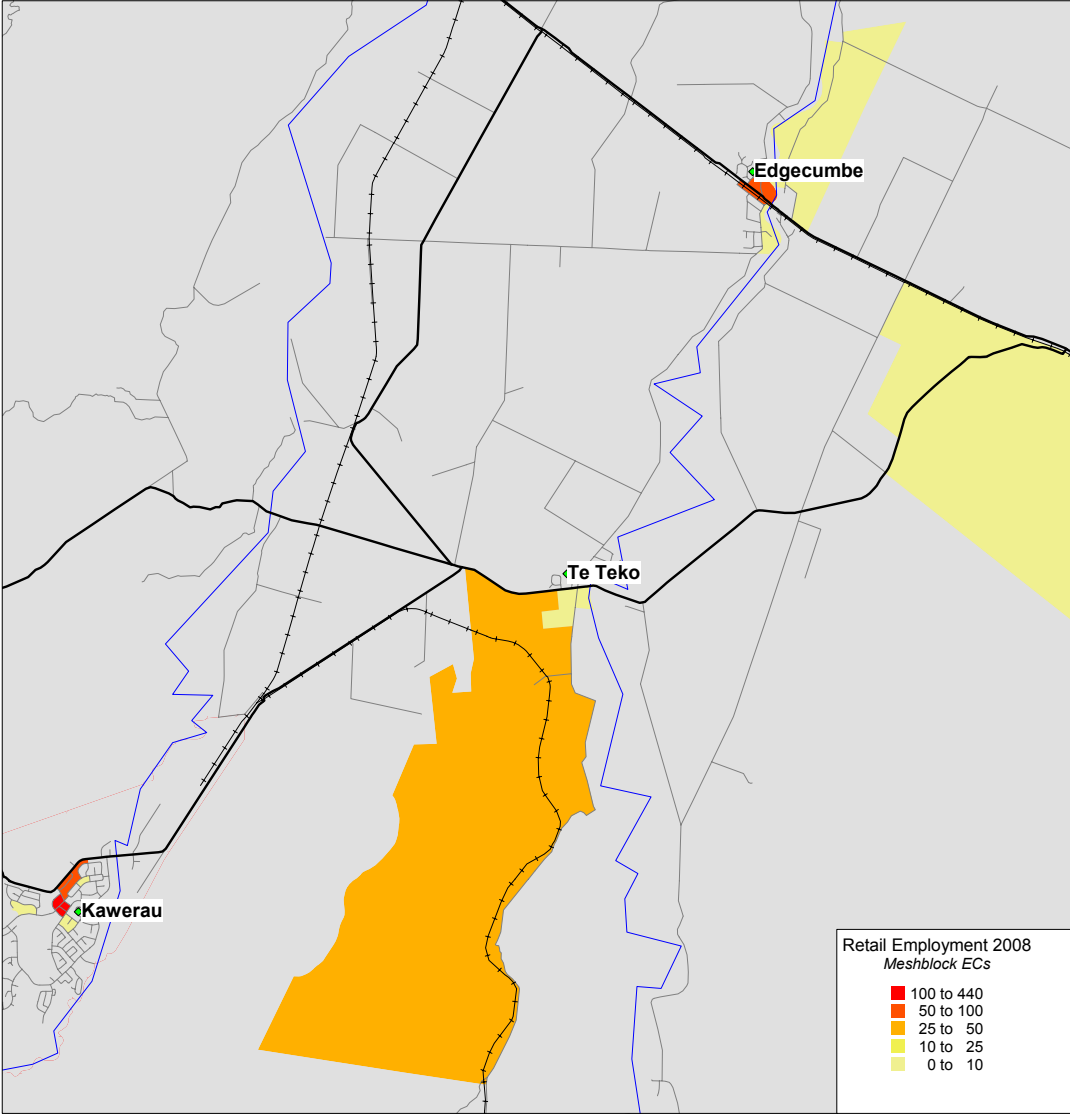


FIGURE 6: 'OTHER' RETAIL EMPLOYMENT ACTIVITY 2008



## 2.4. EXISTING BUSINESS LAND SUPPLY

The existing business land supply in Whakatane is fairly centralized, with the bulk in and around the town centre. There is also significant business land supply on SH30 (opposite The Hub LFR centre) and at the southern end of the Whakatane urban area.

A visit to the various areas of business land supply showed very few vacant sites were left in each business area and not enough to maintain a satisfactory commercial land buffer. The quality of the business land environments was overall considered average, although the new developments on SH30 opposite The Hub LFR were, being newer, in general higher quality.

There appeared to be limited expansion potential for the southern commercial node of Whakatane, while the appropriateness of this location for additional commercial activity is questionable given future commercial trends.

Some sites within each of the commercial area could be developed more intensely, although this is difficult to gauge just from a site visit as many industries have low intensive development on their site but that could simply be a reflection of the nature of the business and in fact the activity maybe operating and utilizing the land efficiently.

## 3. FUTURE BUSINESS ENVIRONMENT

### 3.1. EMPLOYMENT STRUCTURE

This section estimates the likely commercial employment, and thus land demand, within the entire study area to 2046. These projections are based on the competitive environment Whakatane currently faces as well as trended population growth and broader economic data. The basis for these projections are reports previously undertaken by Property Economics and based on a national employment environment and projections by NZIER that have subsequently been updated.

TABLE 6: PROJECTED COMMERCIAL EMPLOYMENT ACTIVITY WHAKATANE AND KAWERAU DISTRICTS

	2008	2011	2031	2046
J Information Media and Telecommunications	176	187	290	348
K Financial and Insurance Services	265	297	434	512
L Rental, Hiring and Real Estate Services	215	216	261	308
M Professional, Scientific and Technical Services	440	420	508	598
N Administrative and Support Services	580	582	705	830
O Public Administration and Safety	680	655	751	877
P Education and Training	1,960	2,005	2,250	2,686
Q Health Care and Social Assistance	1,570	1,537	1,533	1,830
R Arts and Recreation Services	166	169	175	207
S Other Services	690	705	826	974
<b>Total All Industries</b>	<b>6,742</b>	<b>6,758</b>	<b>7,887</b>	<b>9,351</b>

This table estimates growth of some 2,600 commercial ECs (Employment Count) by 2046. The primary growth sectors by volume include: Education (of which only 10% typically locates in commercial areas), Healthcare service (which again only represents itself at a low level in commercial areas), and Financial and Support services. These last two sectors are key marginal growth areas also. These are the sectors that will require the greatest amenity and profile in order to be attracted to this area.

While support services require the industry to support financial services and are attracted to an area based on the resident skill base, amenity, access to market and vitality of a given area. These factors will be vital for Whakatane to pursue in order to meet these projections or even to strive for the employment required under a more aggressive population scenario.

TABLE 7: ESTIMATED COMMERCIAL LAND DEMAND GROWTH TO 2046

Employee Growth	Communication	Property, Business Services & Finance	Health	Government	Other	Total
2008-2031	114	283	-18	57	146	582
2031-2046	58	214	148	101	194	715
<b>2008-2046</b>	<b>172</b>	<b>498</b>	<b>130</b>	<b>157</b>	<b>340</b>	<b>1,297</b>
<b>Floorspace Growth (sqm)</b>						
2008-2031	3,990	8,502	-1,070	2,546	11,715	25,684
2031-2046	2,030	6,426	8,603	4,537	15,520	37,116
<b>2008-2046</b>	<b>6,020</b>	<b>14,928</b>	<b>7,533</b>	<b>7,083</b>	<b>27,235</b>	<b>62,800</b>
<b>Land Requirements (Ha)</b>						
2008-2031	1	3	0	1	2	7
2031-2046	1	3	2	1	2	9
<b>2008-2046</b>	<b>2</b>	<b>6</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>16</b>

Table 5 calculates the commercial land required to accommodate this growth. This figure of 16 hectares needs to be viewed in relation to the total land requirement for this level of activity to be accommodated. For the economy to function efficiently there is a 10% buffer required for purposes of growth, redevelopment, and business mobility. There is also a 30% development margin for 'new' Greenfield land for roading etc. This would require up to 23 hectares of commercial land to accommodate this trended growth.

It is of interest to note that in order to facilitate a more aggressive scenario (as in the retail section below), Scenario 3 would require up to 34 hectares of developable commercial space. It is also important to note that this land figure assumes 'at grade' development. When considering 25% of development at 2 levels plus the net land figure drops to 20 hectares of commercial land.



### 3.2. LOCATION OF COMMERCIAL LAND

The majority of commercial growth will be in sectors that service a more localized market. Due to this it is likely that the growth will be directed at the Whakatane central business area as well as highly accessible locations such as those close to both the business area and State Highway 30. The current levels of land supply in these areas that are suited for this activity are low. This lack of appropriate commercial land in these areas are likely to slow the potential growth in business activities servicing the local market, but more importantly it is likely to significantly reduce the opportunities presented by larger businesses wanting the potential to grow and locate in Whakatane to service a wider market.

## 4. 'SPECIALTY' RETAIL MARKET

### 4.1. MARKET GROWTH

Three scenarios have been assessed in order to project the sustainable 'specialty' retail growth to 2046. There are several assumptions inherent in this assessment including:

- A 10% (increasing) market for Internet and mail order retailing
- An increasing, trended, growth in LFR (Large Format Retailing)
- A 1% increase in real retail growth (through increases in the Marginal Propensity to Consume and real income levels)
- Static real productivity levels per retail category (this has the potential to increase over time, however, due in part to LFR, has decreased over the past decade).
- Given that households are projected to decrease the amount on semi-discretionary per resident will increase
- Scenario 1 – Trended growth rates
- Scenario 2 – Growth in the Whakatane Ward to 25,000 residents in total
- Scenario 3 – Growth in the Whakatane Ward to 35,000 residents in total

TABLE 8: TOTAL RETAIL SPEND GROWTH SCENARIO ONE (\$M)

	2006	2009	2021	2031	2046
Food retailing	135.8	142.1	173.5	195.7	229.4
Clothing, footwear and personal accessories retailing	35.0	36.6	47.3	58.7	71.2
Furniture, floor coverings, houseware and textile goods retailing	14.7	15.0	17.5	19.3	22.1
Electrical and electronic goods retailing	15.1	15.4	18.0	19.8	22.8
Hardware, building and garden supplies retailing	5.5	5.8	7.0	7.8	9.1
Pharmaceutical and personal care goods retailing	12.2	12.5	15.6	18.8	22.3
Department stores	34.2	35.8	45.0	53.1	63.4
Recreational goods retailing	19.1	19.2	23.1	26.9	31.4
Other goods retailing	21.6	22.3	28.9	36.6	44.5
Food and beverage services	76.7	77.9	96.6	117.1	139.3
<b>Total</b>	<b>370.0</b>	<b>382.4</b>	<b>472.6</b>	<b>553.8</b>	<b>655.5</b>

Table 6 shows that under a standard growth (Statistics NZ medium growth) scenario for the entire catchment, it is estimated that retail spend growth to 2046 will be approximately \$285m per annum. In terms of specialty retail this represents growth of some \$157m (the remainder being large format retail and convenience (some convenience is included in specialty retailing)).

TABLE 9: SPECIALTY RETAIL SPEND GROWTH SCENARIO ONE

	2006	2009	2021	2031	2046
Food retailing	33.9	35.5	43.4	48.9	57.4
Clothing, footwear and personal accessories retailing	31.5	32.9	42.6	52.8	64.1
Furniture, floor coverings, houseware and textile goods retailing	0.0	0.0	0.0	0.0	0.0
Electrical and electronic goods retailing	0.0	0.0	0.0	0.0	0.0
Hardware, building and garden supplies retailing	0.0	0.0	0.0	0.0	0.0
Pharmaceutical and personal care goods retailing	12.2	12.5	15.6	18.8	22.3
Department stores	0.0	0.0	0.0	0.0	0.0
Recreational goods retailing	9.5	9.6	11.5	13.5	15.7
Other goods retailing	20.5	21.1	27.4	34.8	42.2
Food and beverage services	76.7	77.9	96.6	117.1	139.3
<b>Total</b>	<b>184.5</b>	<b>189.6</b>	<b>237.1</b>	<b>285.8</b>	<b>341.0</b>

Over \$150m per annum of specialty retail spend generated within the area will require over 18,000 sqm of retail trading floorspace to accommodate this. It can be assumed that some (although limited) leakage from this catchment will occur. However under scenario one over 14,000 sqm of additional specialty (20% leakage) retail floorspace will be required in Whakatane by 2046. Given a 30% conversion to GFA (gross floor area) and a further 40% for parking and services this equates to approximately 2.5 hectares of retail land required for specialty retailing.

TABLE 10: SPECIALTY RETAIL SUSTAINABLE FLOORSPACE GROWTH SCENARIO ONE

	2006	2009	2021	2031	2046
Food retailing	2,716	2,842	3,470	3,915	4,588
Clothing, footwear and personal accessories retailing	3,971	4,143	5,362	6,652	8,063
Furniture, floor coverings, houseware and textile goods retailing	0	0	0	0	0
Electrical and electronic goods retailing	0	0	0	0	0
Hardware, building and garden supplies retailing	0	0	0	0	0
Pharmaceutical and personal care goods retailing	1,222	1,252	1,559	1,875	2,233
Department stores	0	0	0	0	0
Recreational goods retailing	1,591	1,603	1,925	2,242	2,620
Other goods retailing	3,160	3,254	4,221	5,347	6,497
Food and beverage services	8,526	8,651	10,733	13,010	15,481
<b>Total</b>	<b>21,185</b>	<b>21,743</b>	<b>27,270</b>	<b>33,041</b>	<b>39,483</b>

Under Scenario 2 this floorspace requirement increases by approximately 5,000 (RTF) equating to a further 0.8 hectares of retail land required by 2046.

TABLE 11: SPECIALTY RETAIL SUSTAINABLE FLOORSPACE GROWTH SCENARIO TWO

	2006	2009	2021	2031	2046
Food retailing	2,716	2,842	3,887	4,384	5,139
Clothing, footwear and personal accessories retailing	3,971	4,143	6,005	7,451	9,031
Furniture, floor coverings, houseware and textile goods retailing	0	0	0	0	0
Electrical and electronic goods retailing	0	0	0	0	0
Hardware, building and garden supplies retailing	0	0	0	0	0
Pharmaceutical and personal care goods retailing	1,222	1,252	1,746	2,100	2,501
Department stores	0	0	0	0	0
Recreational goods retailing	1,591	1,603	2,156	2,511	2,934
Other goods retailing	3,160	3,254	4,728	5,988	7,277
Food and beverage services	8,526	8,651	12,021	14,571	17,338
<b>Total</b>	<b>21,185</b>	<b>21,743</b>	<b>30,542</b>	<b>37,006</b>	<b>44,221</b>

If the Whakatane Ward were to increase to over 35,000 residents by 2046 the catchment would require an additional hectare of land totaling 4.2 hectares of land for specialty retailing.

TABLE 12: SPECIALTY RETAIL SUSTAINABLE FLOORSPACE GROWTH SCENARIO THREE

	2006	2009	2021	2031	2046
Food retailing	2,716	2,842	4,509	5,086	5,961
Clothing, footwear and personal accessories retailing	3,971	4,143	6,966	8,643	10,476
Furniture, floor coverings, houseware and textile goods retailing	0	0	0	0	0
Electrical and electronic goods retailing	0	0	0	0	0
Hardware, building and garden supplies retailing	0	0	0	0	0
Pharmaceutical and personal care goods retailing	1,222	1,252	2,026	2,436	2,901
Department stores	0	0	0	0	0
Recreational goods retailing	1,591	1,603	2,501	2,913	3,404
Other goods retailing	3,160	3,254	5,484	6,946	8,441
Food and beverage services	8,526	8,651	13,944	16,902	20,112
<b>Total</b>	<b>21,185</b>	<b>21,743</b>	<b>35,429</b>	<b>42,927</b>	<b>51,296</b>

## 4.2. MARKET LOCATION

Although some retail floorspace will locate in areas such as Kawerau and other centres it is clear, especially with regard to Scenarios 2 and 3, that the majority of retail floorspace will be accommodated within the Whakatane CBD and surrounds. This is true to a lesser degree when considering just specialty retail which includes some level of convenience, than LFR. However it is still considered that at least 65% of specialty retail floorspace will need to be accommodated within the central Whakatane business area, with this figure rising to over 80% for scenario 2 and three.