

# Supermarket Retailing in the ACT



Background Paper

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ACT Planning &  
Land Authority



## Introduction

Changes in the retail industry led to the development of supermarket retailing after about 1960. The introduction of the group centre level into ACT retail hierarchy in the early 1960s was designed to facilitate the provision of supermarket retailing.

Over time the size of supermarkets, particularly at the group and town centre level has increased as fresh food elements have been incorporated.

This paper, based largely on data in the ACT Retail Model (ACTPLA, 2007) and the Commercial Centres and Industrial Areas Inventory (CCAIAI) (ACTPLA, 2007) outlines the existing provision and trading performance of supermarkets in the ACT.

## Existing provision

Attachment 1 identifies the existing supermarket space (Gross Floor Area) by centre. The Territory Plan defines supermarkets as “a large shop selling food and other household items where the selection of goods is organised on a self service basis”. No definition of large is provided.

The CCAIAI captures a number of small grocery stores with less than 100m<sup>2</sup> GFA under the heading supermarket. Table 1 indicates the supermarket space by district and hierarchy level while Table 2 indicates the share of space by district and hierarchy level.

Table 1: Supermarket floorspace at centres 2007

Town	Town centre	Group centre	Local centre	Total
Canberra Central	5173	8227	8149	21549
Belconnen	9238	14963	6174	30375
Woden-Weston Ck	8878	6575	4114	19567
Tuggeranong	10800	14751	4833	30384
Gungahlin	10109	0	1794	11903
Total	44198	44516	25064	113778

\* In addition to supermarket space at centres, there is a limited amount of supermarket space at Mitchell (288m<sup>2</sup>), Fyshwick (55m<sup>2</sup>), the Australian National University (56m<sup>2</sup>) and the University of Canberra (196m<sup>2</sup>).

Table 2: Supermarket floorspace at centres 2007 - %

Town	Town Centre	Group Centre	Local Centre
Canberra Central	24.0	38.2	37.8
Belconnen	30.4	49.3	20.3
Woden-Weston Ck	45.3	33.6	21.0
Tuggeranong	35.5	48.5	15.9
Gungahlin	84.9	0	15.1
Total	38.8	39.1	22.0

Of the supermarket space, 40 per cent is at town centres, 38 per cent at group centres, 21 per cent at local centres, and 0.6 per cent elsewhere.

# Floorspace by operator

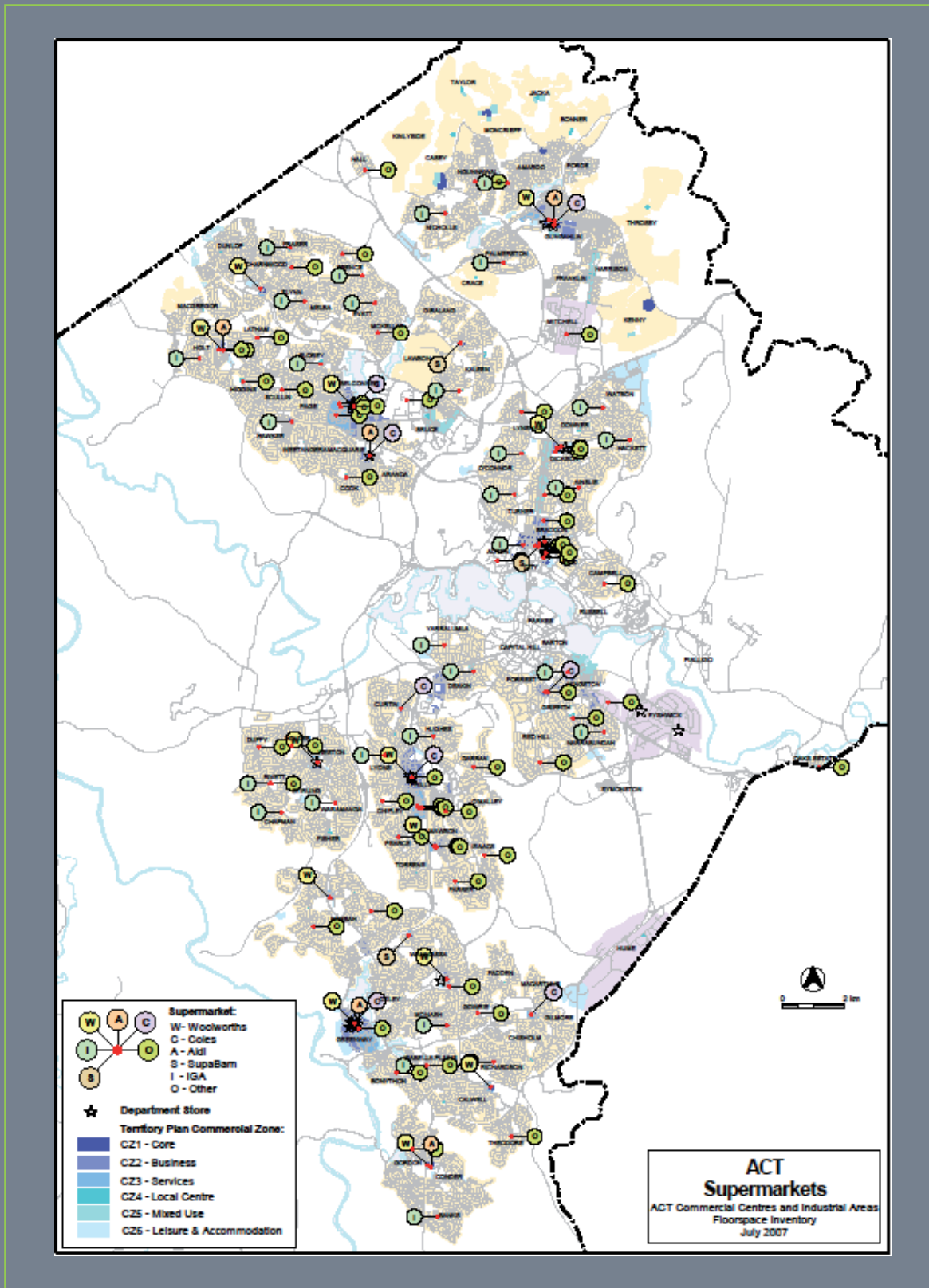


Figure 1 indicates the location of supermarkets in Canberra and their operator.

Figure 2 and Table 3 indicate that 36 per cent of space is operated by Woolworths and 22 per cent by Coles and that these chains operate 73 per cent of supermarket space at town and group centres. Supabarn and Aldi are also represented at the town and group centre level. None of these chains are found at local centres, which have operators such as IGA.

Figure 2: Supermarket space ACT 2007 by operator - %

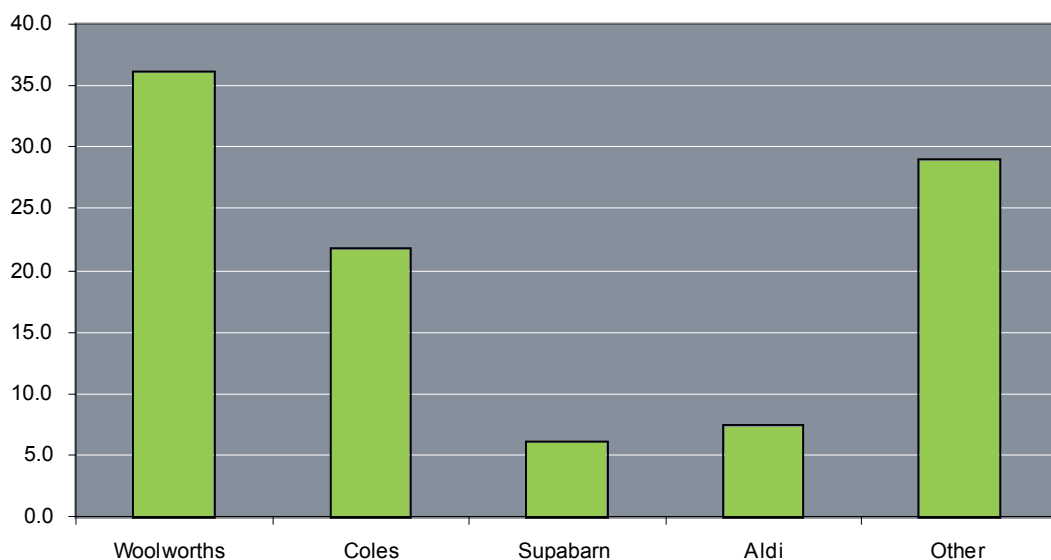


Table 3 – Share of floorspace by operator at centres 2007 - %

Operator	Town centre	Group centre	Town and group centre	Local	Total
Woolworths	41.3	51.0	45.7	0	36.0
Coles	31.0	24.3	27.6	0	21.8
Aldi	8.2	10.7	9.4	0	7.4
Supabarn	8.0	7.3	7.6	0	6.0
Other	11.5	6.7	9.7	100	28.8
Total	100	100	100	100	100

## Supermarket share of space at centres

Table 4 indicates the share of supermarket space at centres varies from 5.4 per cent at town centres to 24.4 per cent at local centres. Tuggeranong and Belconnen have a higher than average share of supermarket space at group and local centres.

Table 4: Supermarket share of floorspace at centres 2007 - %

Town	Town centre	Group centre	Local centre
Canberra Central	2.8	7.2	18.1
Belconnen	4.0	23.0	29.5
Woden-Weston Ck	4.6	10.3	21.5
Tuggeranong	6.6	27.5	52.5
Gungahlin	19.5	0	21.0
Total	5.4	15.0	24.4

Table 5 indicates that the supermarket share of retail space at centres varies from 11.1 per cent at town centres to 46.2 per cent at local centres. Tuggeranong and Belconnen have a higher than average share of supermarket space at group and local centres.

Table 5: Supermarket share of retail floorspace at centres 2007 - %

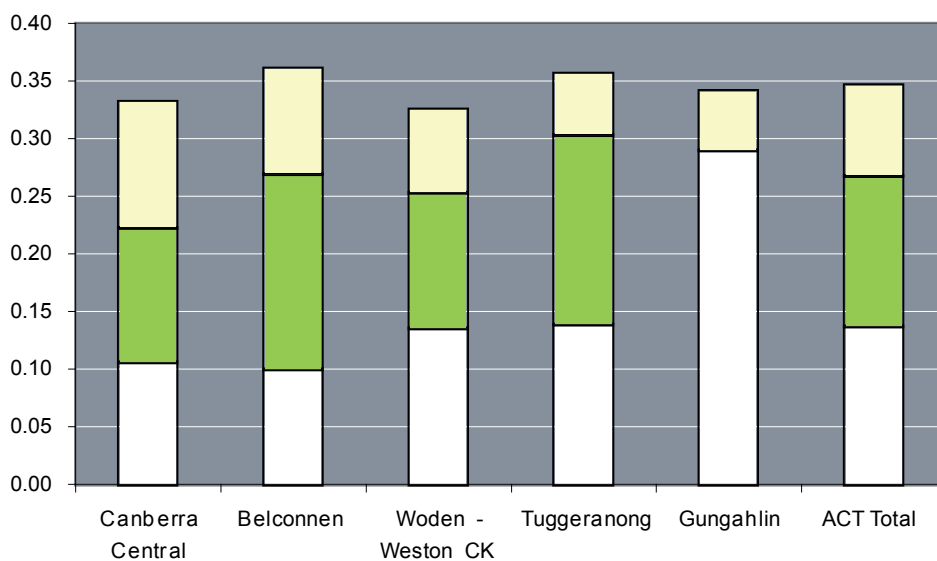
Town	Town Centre	Group Centre	Local Centre
Canberra Central	5.4	13.9	37.1
Belconnen	9.1	34.3	52.1
Woden-Weston Ck	10.7	18.5	39.3
Tuggeranong	13.0	44.4	83.4
Gungahlin	28.4	0	43.1
Total	11.1	25.9	46.2

## Per capita supermarket floorspace

Figure 3 indicates the floorspace (GFA) per capita by hierarchy level. The overall provision was 0.35m<sup>2</sup> per capita of which 0.14 m<sup>2</sup> was at town centres, 0.13m<sup>2</sup> at group centres and 0.08m<sup>2</sup> at local centres. While the overall per capita provision is similar between districts, the per capita provision by hierarchy level varies considerably. The local centre provision per capita in Tuggeranong and Gungahlin was 0.05m<sup>2</sup> whereas in Canberra Central the provision was 0.11m<sup>2</sup>. Gungahlin had a per capita provision of 0.29m<sup>2</sup> per capita at the town centre and an absence of group centre supermarkets. Belconnen (0.16m<sup>2</sup>) and Tuggeranong (0.17m<sup>2</sup>) have the highest per capita supermarket provision at the group centre level.

The variation in per capita provision by hierarchy level reflects the outcome of planning and development processes. The low supermarket provision per capita at the group centre level in Canberra Central, for example is a product of the group centre level in the hierarchy not being introduced to after 1960, while the absence of group centre space in Gungahlin is a reflection of the focus on establishing the town centre in the initial stages of the town's development. The release of the Amaroo and Casey group centres in 2010–11 will address this deficiency

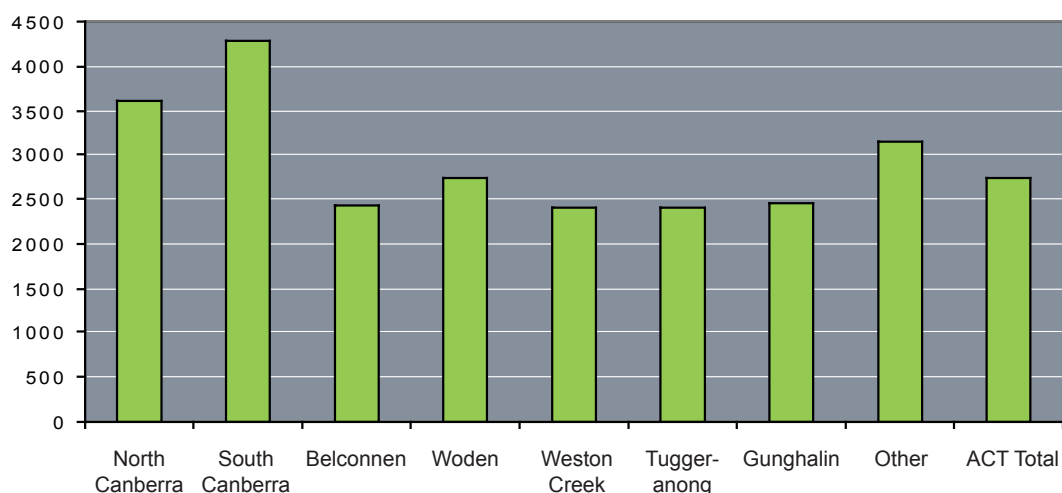
Figure 3: Per capita supermarket floorspace (GFA) by hierarchy level



## Sales at supermarkets

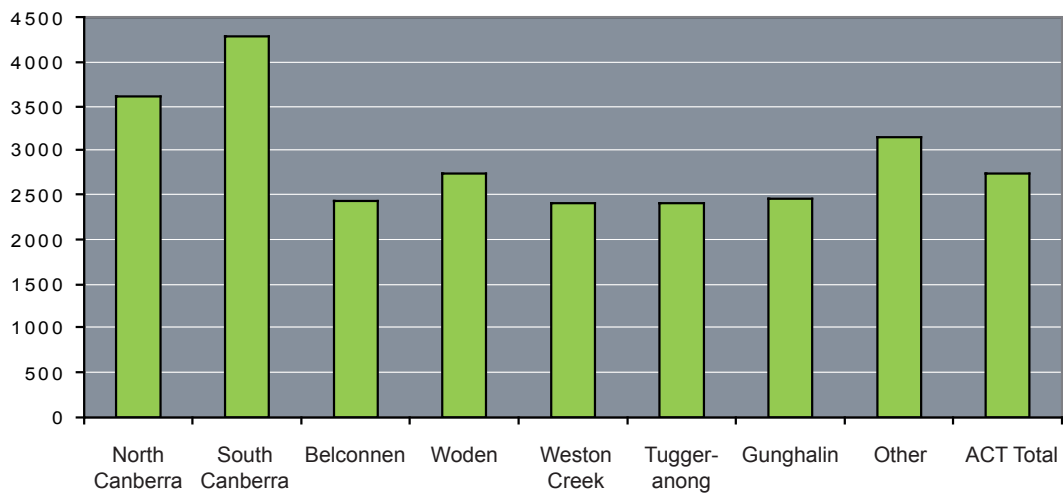
The ACT Retail Model (2007) indicated that sales at supermarkets represented 23.8 per cent of retail expenditure at retail outlets in the ACT (see Figure 4). Spending at supermarkets by people who live, work or are tourists in a suburb varied from 20.2 per cent in South Canberra to 27 per cent in Tuggeranong. The Canberra average was 24.4 per cent.

Figure 4: Supermarket share of spending by district



In 2007 the average per capita expenditure at supermarkets in the ACT by ACT residents was \$2742. The level varied from \$2397 per capita by Tuggeranong residents to \$4272 by the residents of South Canberra.

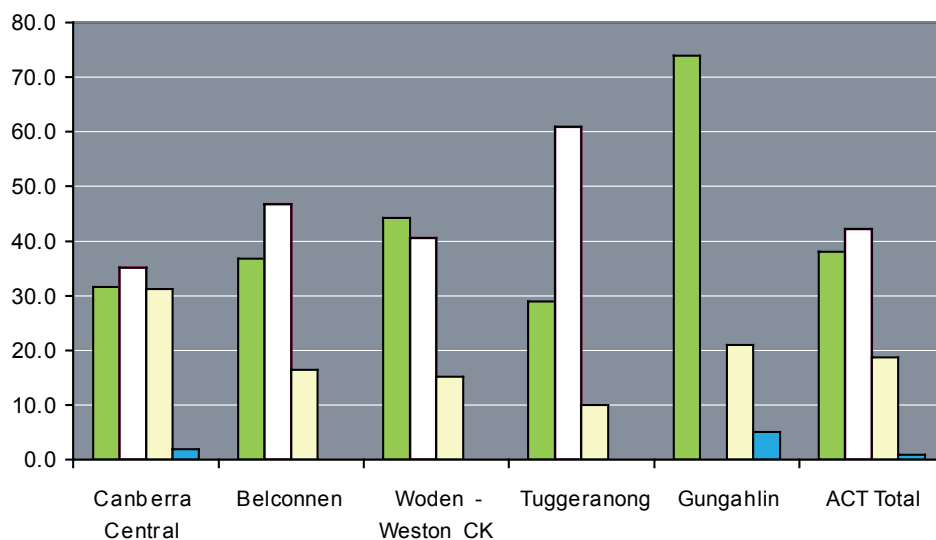
Figure 5: Supermarket sales per capita by district



## Supermarket sales per m<sup>2</sup> NSA

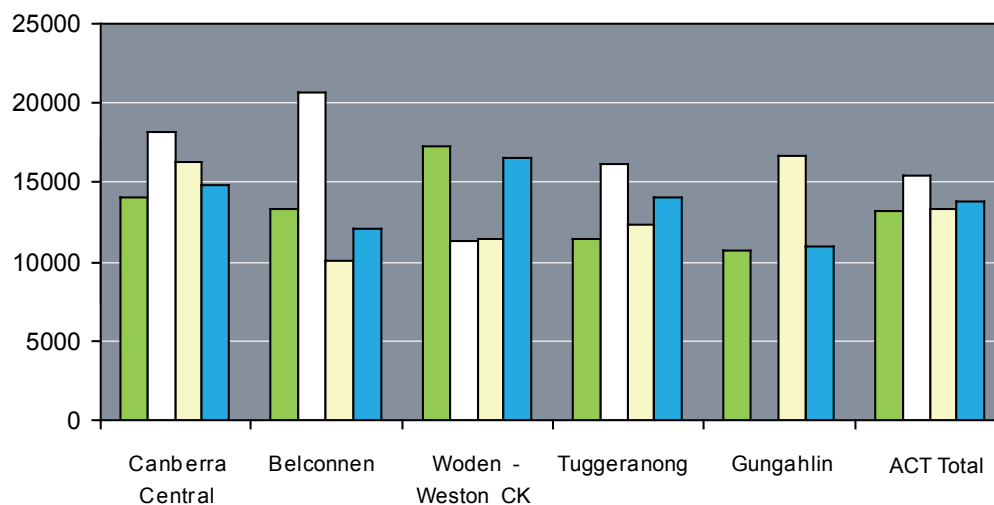
Generally the sales per m<sup>2</sup> are higher at supermarkets found at town and group centres.

Figure 6: Supermarket share of sales by hierarchy level



Supermarkets at group centres had the highest sales per m<sup>2</sup> in the ACT with the exception of Woden and Weston Creek, where the sales per m<sup>2</sup> were highest at town centres supermarkets (see Figure 7).

Figure 7: Sales per m<sup>2</sup> by hierarchy level



## Share of floorspace and share of sales

There is a relationship between the level of floorspace in a district and the levels of sales attracted.

At the ACT level, town centres had 39 per cent of supermarket floorspace and attracted 38 per cent of sales. In Canberra Central (Civic), Belconnen, Woden and Weston Creek, town centres attracted a higher share of sales than the share of floorspace, while Gungahlin and Tuggeranong town centre share of sales were less than their floorspace share (see Figure 8).

At the group centres the share of sales (43 per cent) was higher than the share of floorspace (38 per cent), most notably in Tuggeranong, Woden and Weston Creek with the shares approximately in balance in Canberra Central and Belconnen (See Figure 9).

At local centres the share of sales (19 per cent) was lower than the share of floorspace (23 per cent) with the exception of Gungahlin. The share of sales and floorspace were approximately equal in Canberra Central (see Figure 10).

Figure 8: Town centre share of floorspace and share of sales

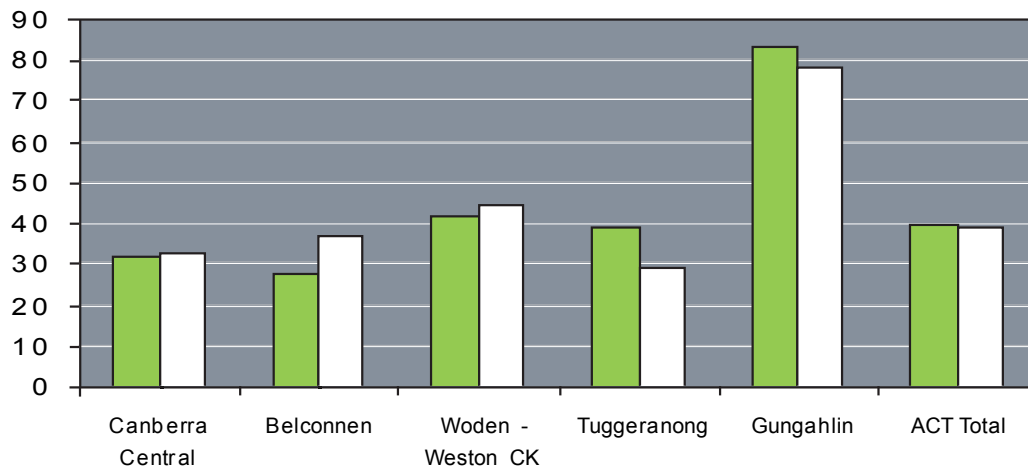


Figure 9: Group centre share of floorspace and share of sales

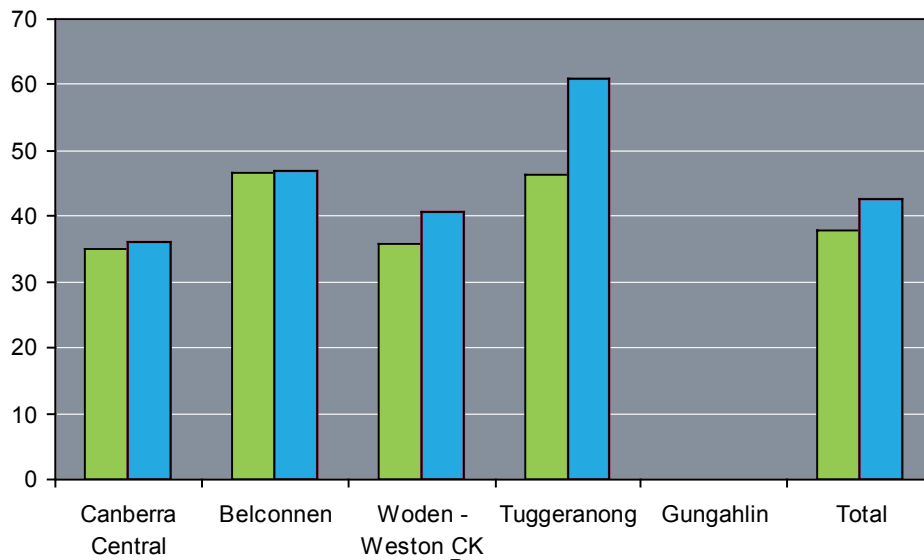
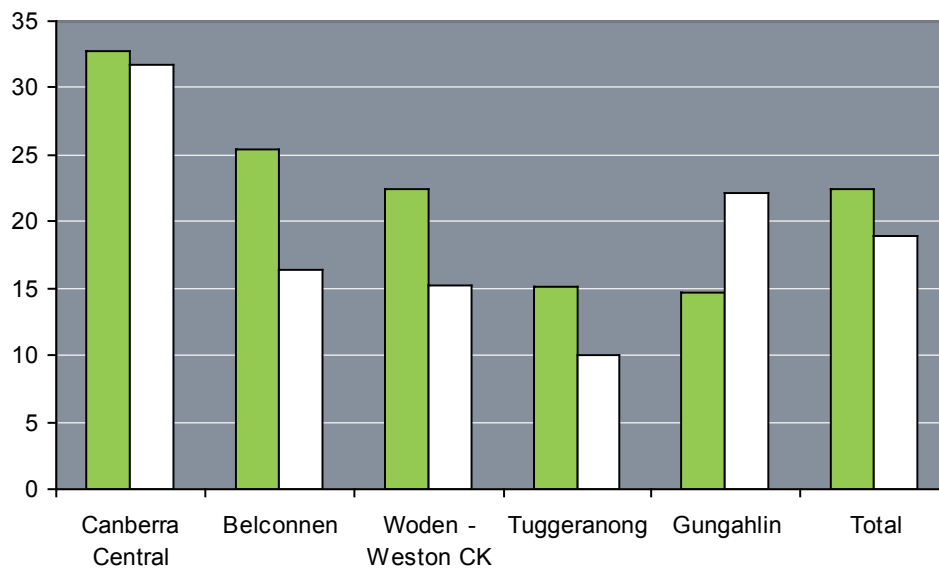


Figure 10: Local centre share of floorspace and share of sales



## Attachment 1 – 2007 Supermarket retailing in the ACT

Town centres core		m2 GFA	
North Canberra	Civic	1,400	Aldi
Tuggeranong	Tuggeranong	1,100	Aldi
Gungahlin	Gungahlin	1,326	Aldi
Belconnen	Belconnen	86	Asian Groceries
North Canberra	Civic	200	Asian Groceries
North Canberra	Civic	44	Asian Groceries
Tuggeranong	Tuggeranong	180	Asian Groceries
Belconnen	Belconnen	3,460	Coles
Tuggeranong	Tuggeranong	3,846	Coles
Gungahlin	Gungahlin	3,706	Coles
Woden	Phillip	3,400	Coles
Tuggeranong	Tuggeranong	270	Hub
Gungahlin	Gungahlin	354	Hub
Gungahlin	Gungahlin	140	Hub
North Canberra	Civic	401	IGA
North Canberra	Civic	837	IGA
Tuggeranong	Tuggeranong	1,303	Mother Nature's
North Canberra	Civic	3,700	Supabarn
North Canberra	Civic	176	Unspecified
North Canberra	Civic	472	Unspecified
North Canberra	Civic	50	Unspecified
Belconnen	Belconnen	4,820	Woolworths
Tuggeranong	Tuggeranong	5,674	Woolworths
Gungahlin	Gungahlin	4,583	Woolworths
Woden	Phillip Core	4,100	Woolworths
Total Space		45,628	
<b>Town centre business area</b>			
Belconnen	Belconnen STA	230	Asian Groceries
Belconnen	Belconnen STA	102	Asian Groceries
Belconnen	Belconnen STA	111	Asian Groceries
Belconnen	Belconnen STA	60	Asian Groceries
Woden	Phillip STA	60	Asian Groceries
North Canberra	Braddon STA	130	Indian Foods
Woden	Phillip STA	70	Indian Foods
Woden	Phillip STA	53	Unspecified
Total Space		816	
<b>Group centres cores</b>			
Tuggeranong	Conder	1,720	Aldi
Belconnen	Kippax	1,700	Aldi
Belconnen	Jamison	1,360	Aldi
Belconnen	Kippax	62	Asian Groceries
Woden	Mawson	168	Asian Groceries
Tuggeranong	Chisholm	1,551	Coles

Woden	Curtin	1,444	Coles
South Canberra	Manuka	3,479	Coles
Belconnen	Jamison	4,350	Coles
Woden	Mawson	90	Continental Groceries
Belconnen	Hawker	742	IGA
South Canberra	Kingston	1,136	IGA
South Canberra	Manuka	178	Jones the Grocer
Belconnen	Kaleen	1,709	Supabarn
Tuggeranong	Wanniassa	1,546	Supabarn
Tuggeranong	Calwell	1,722	Woolworths
Belconnen	Charnwood	1,530	Woolworths
Tuggeranong	Conder	3,497	Woolworths
North Canberra	Dickson	3,055	Woolworths
Tuggeranong	Kambah	1,611	Woolworths
Belconnen	Kippax	3,430	Woolworths
Woden	Mawson	2,095	Woolworths
Tuggeranong	Erindale	2,972	Woolworths
Weston Creek	Weston	2,778	Woolworths
Total GC Core		43,925	
Group centre business areas			
North Canberra	Dickson STA	40	Asian Groceries
North Canberra	Dickson STA	75	Asian Groceries
Tuggeranong	Erindale STA	132	Asian Groceries
Belconnen	Kippax STA	80	Mini Market
North Canberra	Dickson STA	170	Unspecified
North Canberra	Dickson STA	94	Unspecified
Total		591	
Local centres			
Belconnen	Charnwood Local	308	4 Seven Day Food
North Canberra	Braddon Local	130	5 Star
Weston Creek	Duffy Local	185	5 Star
Belconnen	Scullin Local	319	5 Star
Belconnen	Spence SE Local	354	5 Star
Tuggeranong	Theodore Local	270	5 Star
Woden	Farrer Local	264	Cut Price
Tuggeranong	Gordon Local	450	Foodworks
Belconnen	Higgins Local	395	Foodworks
Weston Creek	Holder Local	180	Foodworks
Belconnen	McKellar Local	480	Foodworks
Woden	Pearce Local	413	Foodworks
North Canberra	Campbell Local	280	Friendly
Belconnen	Cook Local	577	Friendly
Woden	Garran Local	223	Friendly
Tuggeranong	Gowrie Local	572	Friendly
Tuggeranong	Kambah Local - Castley	594	Friendly
South Canberra	Red Hill Local	441	Friendly
Belconnen	Spence NW Local	474	Friendly
Belconnen	Latham Local	175	Handymart
North Canberra	Ainslie Local	1,200	IGA
Tuggeranong	Banks Local	404	IGA

Weston Creek	Chapman Local	392	IGA
South Canberra	Deakin Local	1,029	IGA
Belconnen	Evatt Local	724	IGA
Belconnen	Florey Local	860	IGA
Belconnen	Fraser Local	293	IGA
North Canberra	Hackett Local	887	IGA
Belconnen	Holt Local	422	IGA
Woden	Hughes Local	768	IGA
Tuggeranong	Isabella Plains Local	385	IGA
Belconnen	Kaleen Sth Local	530	IGA
North Canberra	Lyneham Local	559	IGA
Woden	Lyons Local	566	IGA
Belconnen	Melba Local	263	IGA
Tuggeranong	Monash Local	450	IGA
South Canberra	Narrabundah Local	960	IGA
Gungahlin	Ngunnawal Platypus Centre	388	IGA
Gungahlin	Nicholls Local	630	IGA
North Canberra	O'Connor Local	385	IGA
Gungahlin	Palmerston Local	426	IGA
Tuggeranong	Richardson Local	606	IGA
Weston Creek	Rivett Local	273	IGA
Weston Creek	Waramanga Local	255	IGA
North Canberra	Watson Local	338	IGA
South Canberra	Yarralumla Local	600	IGA
Tuggeranong	Isabella Plains Local	100	Indian Foods
Woden	Mawson Local	40	Mini Market
North Canberra	Nth Lyneham Local	73	Mini Market
Weston Creek	Rivett Local	234	Mini Market
Gungahlin	Ngunnawal Local	180	Quik
South Canberra	Griffith Local	807	Shoprite
Tuggeranong	Mannheim	330	Sunshine
Tuggeranong	Bonython	172	Bonython Store
Woden	Chifley Local	221	Unspecified
Gungahlin	Hall Local	170	Unspecified
Woden	Isaacs Local	100	Unspecified
Tuggeranong	Tharwa Local	500	Unspecified
Total		24,604	
<b>Industrial areas</b>			
Other Fyshwick	Fyshwick Industrial	55	Asian Groceries
Other Mitchell	Mitchell Industrial	288	Friendly
Total Industry		343	
<b>Other</b>			
South Canberra	Oaks Estate	460	Foodland
North Canberra	ANU	56	Unspecified
Belconnen	University of Canberra	196	Unspecified
Total Other		712	
<b>Total supermarket space</b>			
		116,276	

