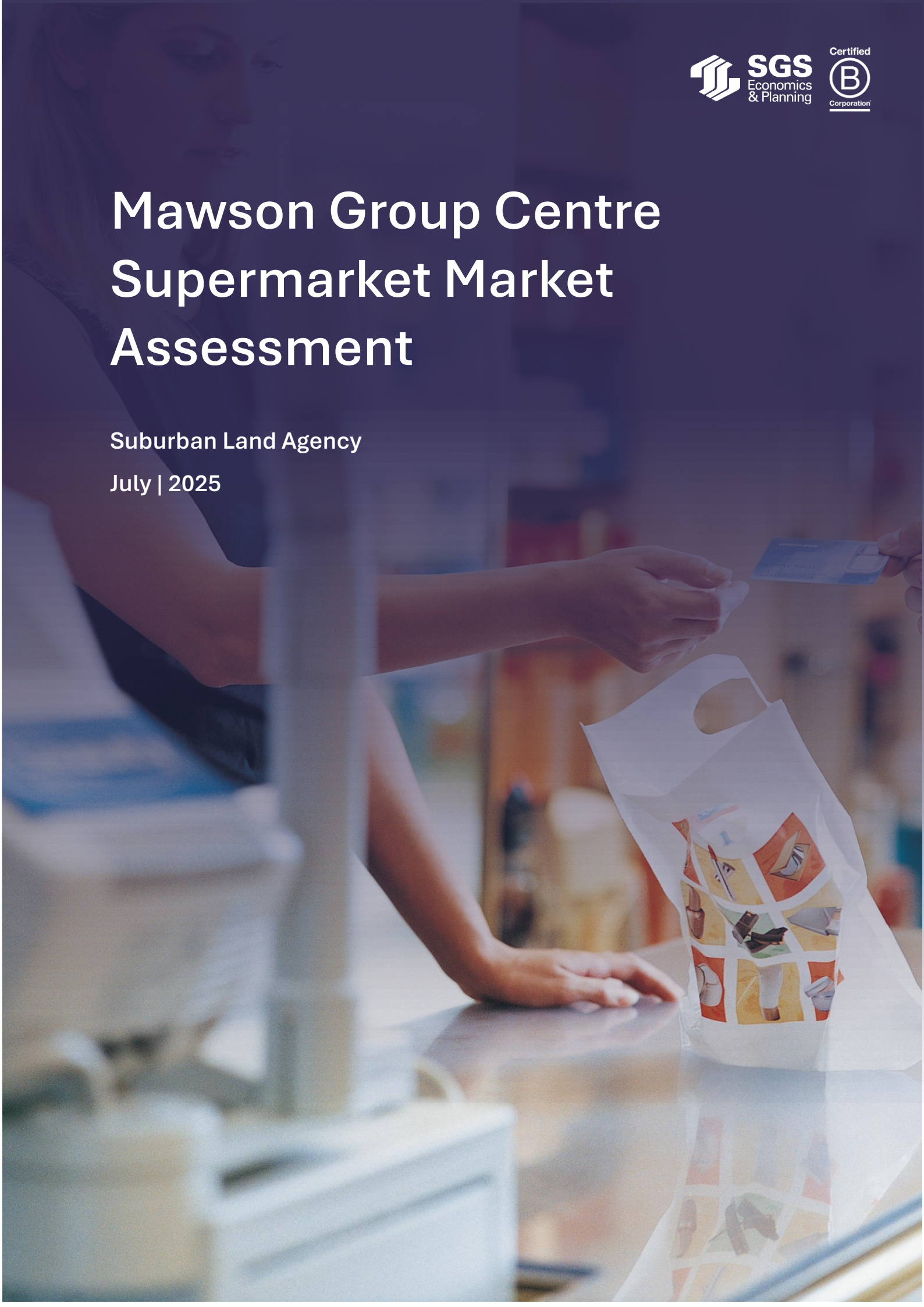
Mawson Group Centre Supermarket Market Assessment

Suburban Land Agency

July | 2025



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1. Introduction

To inform the Suburban Land Agency's (SLA) planning for the Mawson Group Centre master plan, this report explores the potential market demand for additional supermarket floor space in the Group Centre.

1.1 This report

The ACT Government has previously identified an intention for there to be a second supermarket located in the Mawson Group Centre, which sits in the Woden district, south of the Woden Town Centre. The SLA is currently undertaking planning for the Group Centre, including master planning which anticipates significant residential uplift in future.

This report has been prepared for the SLA to understand the current and potential future demand for commercial floorspace – specifically supermarket floorspace – in the Mawson Group centre, in light of the anticipated population increase generated by the master plan. This will in turn inform the release of sites by the SLA. A key question for this report is to understand whether the future population in and around the Group Centre is likely to justify the inclusion of a second supermarket in the master plan.

1.2 Planning and strategic context

Strategies and policies

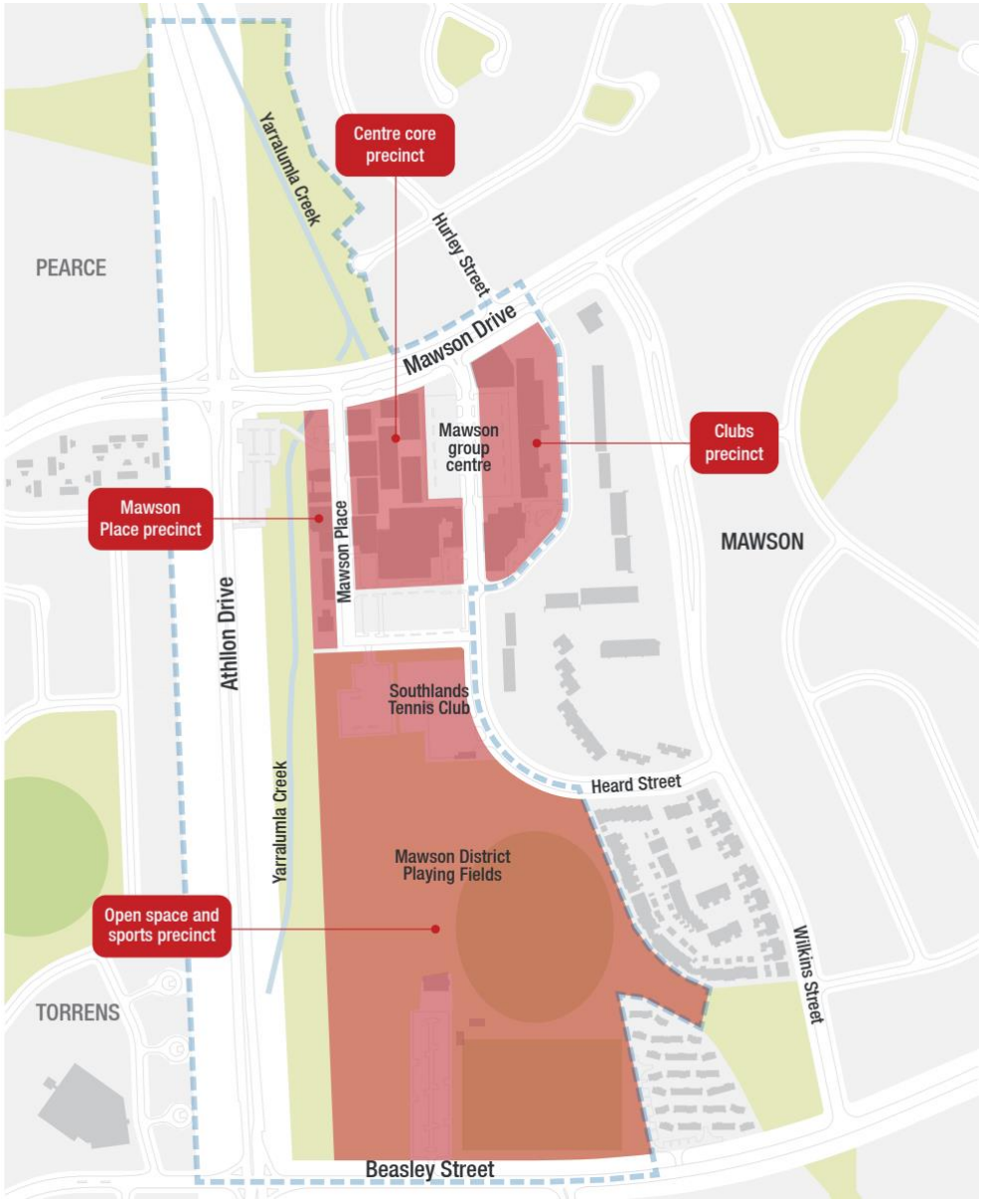
Planning for the Mawson Group Centre has been undertaken over a number of years, including a previous Group Centre master plan prepared in 2015, and more recently with the 2018 ACT Planning Strategy and 2023 ACT District Strategies. The potential for light rail to be extended to Mawson is also an important strategic factor in considering the Centre's future growth.

The Group Centre is currently serviced by the rapid and local bus network. A key recommendation of the 2015 Group Centre master plan was to establish the centre as a public transport hub, supportive of extending light rail from the Woden Town Centre to the Mawson Group Centre.

Despite no final alignment decisions, the Woden District Strategy 'Sustainable Neighbourhoods' driver flags urban transformation and new sustainable communities to be explored linked to possible future light rail corridor between the Curtin and Mawson Group Centres. These centres are intended in the Strategy to continue to have a primarily population servicing role while also supporting new employment opportunities and mixed uses. The Strategy identifies Mawson Group Centre as 'key site', positioning it as a 'high amenity centre, with street life and new mixed-use blocks replacing inefficient surface carparks.' It identifies Mawson as a priority centre for initiatives to support centre viability and enhance its functions to support future residential growth. The need to concentrate new housing in areas close to city, town and group centres, to ensure residential growth is supported by access to services and transport, is also a key theme of the 'Compact and Efficient City strategic direction in the 2018 Planning Strategy.

Reservation of land for an additional supermarket was recognised as a key action in the 2015 Mawson Group Centre master plan. The preferred siting at the time was identified as Block 6 Section 57, which is currently a large open air carpark in the Clubs Precinct portion of the centre, (see Figure 1 below).

Figure 1: Mawson Group Centre – Character Precincts



Source: Mawson Group Centre Master Plan, 2015.

The Woden District Policy, however, retains portions of Section 57 as long-term parking supply. Other District Policy considerations for future development relate to building height, ensuring active frontages that generate activity in the centre core and ensuring pedestrian links to and through the centre.

Retail environment

A range of macroeconomic factors impact on retail spending – in recent years this has included the COVID-19 and increased online retail, conflicts in different parts of the world, and the overall challenging cost of living environment. In the post-COVID era, the trend in Supermarket and Grocery Store turnover has seen 9.9% growth between July 2022 and April 2025 (see Figure 2), resuming the upward trajectory that was seen pre-COVID.

Figure 2: Supermarket turnover trend, July 2022 – April 2025



Source: ABS Retail Trade: Retail Turnover, State by Industry Subgroup, Trend - Supermarket and Grocery Store subgroup.

Household spending on food increased 0.6% in the ACT between March and April 2025, despite an average decrease in household spend of -0.3% across all spending categories in the same time period.[1]

Retail trends from CBRE for the final quarter of 2024 reported a 3% year-on-year increase in retail trade.[2] CBRE retail figures report that the future outlooks for major retail completions will remain heavily focused on neighbourhood development through to 2027 (70%), with regional and sub-regional centres expected to account for about 30% of shopping centre supply to 2027.[3] This suggests development will emphasise growth within the ACT's local and group centre contexts, supportive of convenience retail close to where people live and in centres with a focus on meeting daily needs and less on non-discretionary spending.[4] This is in line with wider retail trends post-COVID and changes to working conditions, specifically work-from-home policies, increasing expectations of local centres to

[1] ABS Monthly Household Spending Indicator April 2025 Key Statistics, https://www.abs.gov.au/statistics/economy/finance/monthly-household-spending-indicator/latest-release
[2] CBRE Australian Retail Figures Q4 2024, https://mktgdocs.cbre.com/2299/05504668-9d72-45a8-b881-83d1dfb2a787-679734291/Australia_Retail_Figures_Q4_20.pdf
[3] CBRE Australian Retail Figures Q4 2024.
[4] Colliers Australian Retail Snapshot Q3 2024 Key Findings, https://www.colliers.com.au/-/media/files/anz/australia/research/2024/quarterly-snapshots/q3/colliers-australian-retail-research-snapshot-q3-2024.ashx

provide more depth of services and diversity of experiences.[5] Destination and experiential retail, including for food and groceries, is identified as examples of how retail in suburban settings can provide alternative demand to the large format model in higher order centres.[6]

1.3 Indicative master plan yield

In progressing the delivery of the Mawson Group Centre master plan to align with the Woden District Strategy drivers, and to assist in the delivery of the Government's commitment of 30,000 new homes by 2030, development scenarios are being considered by Suburban Land Agency. The proposed development scenarios are within/ immediately adjacent the current group centre. The proposed dwelling yields for the respective scenarios are shown in Table 1.

Table 1: Development scenario proposed dwelling yield

Development scenario	Dwelling yield
Option A	1,693
Option B	2,193

Source: Suburban Land Agency (SLA), March 2025.

1.4 Retail catchment

The Woden District has one town centre, two group centres and nine local centres. As one of the two Group Centres, Mawson has a total floorspace (as of 2024) of 21,300 square metres with largely population serving uses including a mix of retail, hospitality, services and commercial premises.[7] The centre currently has one existing full line supermarket, approximately 3,510 square metres in size.[8]

Being immediately south of the Woden Town Centre along Athllon Drive, the centre serves a complementary role to the higher order functions of the Town Centre. The Woden Town Centre is the major hub for employment, community facilities and transport for the southside of Canberra, including residents of the Inner South and Weston Creek districts who do not have their own town centre.

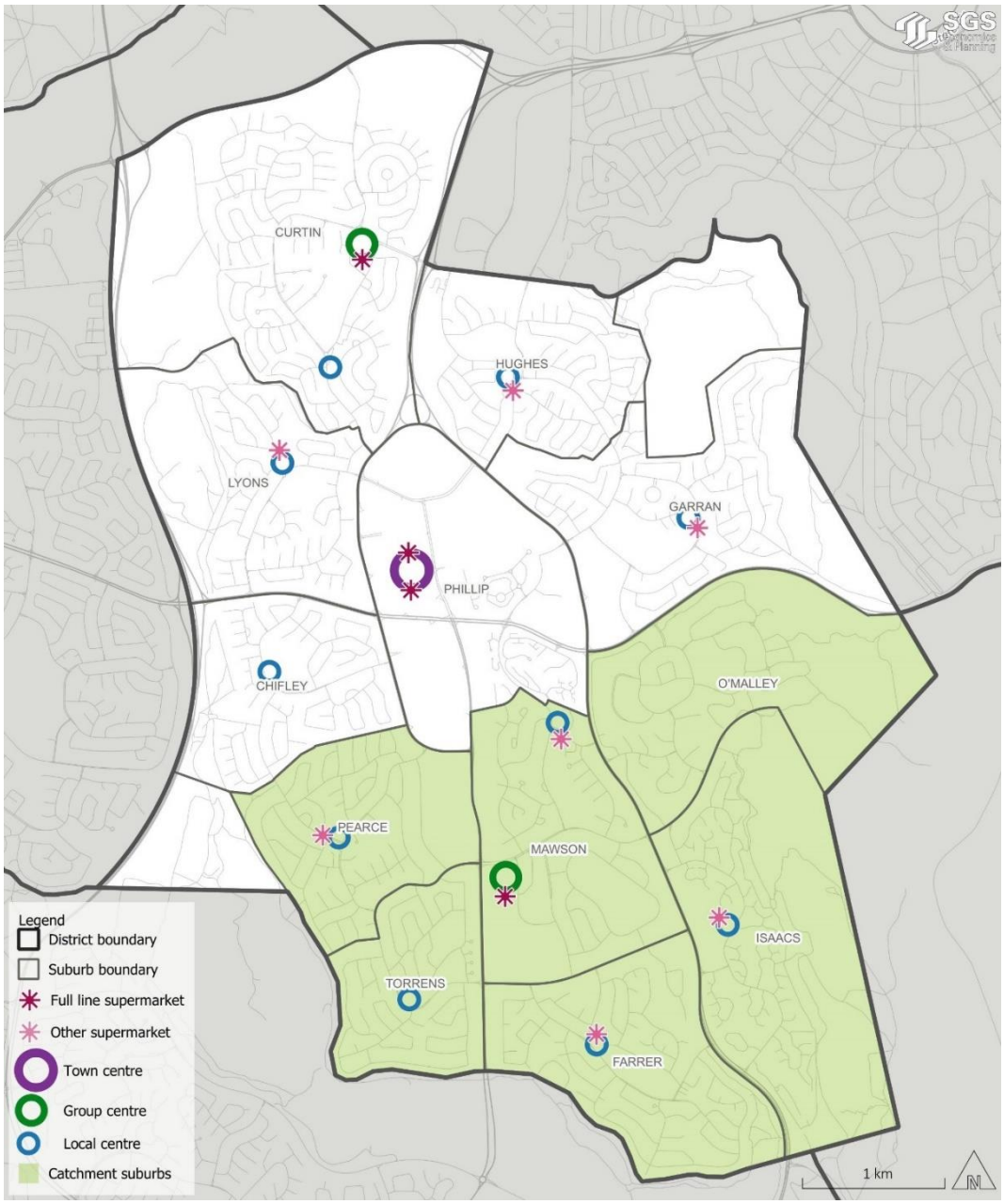
Direction 2.2 of the 2018 Planning Strategy, around enhancing the diversity and resilience of centres, recognises that the focus for group centre should be on providing access to services, retailing and other commercial and community uses that meet the weekly needs of its surrounding suburbs. The 2015

[5] Shopping Centre News, 13 October 2023, The elevated retail and experiences transforming our neighbourhoods, https://www.shoppingcentrenews.com.au/shopping-centre-news/trends/the-elevated-retail-and-experiences-transforming-our-neighbourhoods/
[6] Shopping Centre News, 13 October 2023, The elevated retail and experiences transforming our neighbourhoods.
[7] Sourced from most recent (2024) ACT Commercial and Industrial Floorspace Inventory, provided by EPSDD for this report.
[8] Sourced from most recent (2024) ACT Commercial and Industrial Floorspace Inventory, provided by EPSDD for this report.

Mawson Group Centre masterplan identifies the centres catchment to include the suburbs of Mawson, Farrer, Isaacs, O'Malley, Pearce and Torrens, illustrated in Figure 3.

This catchment of suburbs has been adopted in the market assessment as the trade catchment for the Group Centre. Mawson is the only group centre servicing this catchment, supported by the local centres of Farrer, Issacs, Pearce and Torrens which cater to lower order and local retail needs, with higher order needs serviced by the Woden Town Centre.

Figure 3: Mawson Catchment



Source: SGS Economics and Planning, 2025.

2. Demand and supply of supermarket floorspace

The following section outlines key demand and supply metrics for supermarket floorspace in the Mawson Group Centre, leading to an assessment of whether there is sufficient demand for a second supermarket in the Group Centre.

A combination of population projections, retail metrics, and benchmark floorspace requirements have been used to estimate supportable supermarket floorspace in the Group Centre based on the current and expected population growth generated from the master plan. In summary, the process is as follows:

- The estimated population of the development and/ or catchment in future years is identified.
- Population is multiplied by per capita retail expenditure estimates, generating overall spending for the catchment.
- Typical retail turnover densities (RTDs) for supermarket floorspace – i.e. the amount of money generated by a square metre of floorspace – are applied to the identified total spending for the incoming population, to determine the potential supermarket floorspace supportable by that population.

This analysis is further detailed below.

2.1 Current supermarket provision – potential under/ over-supply

An estimate has been prepared for the current demand for supermarket floorspace driven by the existing catchment population, to understand how this compares with the current provision in the Group Centre.

Expenditure

Expenditure in the Group Centre is likely to be drawn from the suburbs in the immediate catchment around Mawson. For the purposes of understanding the potential demand for the current resident population, expenditure data for the Mawson catchment (as detailed above) has been identified.

MarketInfo data has been used as the source for expenditure data (this is based on the ABS Household Expenditure Survey and is adjusted for local demographics). This data is identified as per capita expenditure rates across a range of commodities – in this case, the focus being on the 'Food and Groceries' category – and is available as detailed spatial geographies, allowing for per capita spending in the Mawson suburb to be identified.

The base MarketInfo data from 2016 has been adjusted to current dollar amounts, inflated using the change in retail turnover observed in the ACT over this time from the ABS,[9] which equates to around a 40% increase between 2016 and 2025. Also noting that not all household spending on food and groceries is done at supermarkets, a capture rate was applied to the per capita expenditure, of 77%, derived from the ABS's data on monthly household spending in Australia.[10]

This per capita rate is then applied to the estimated population to generate total expenditure, with the total population of the catchment suburbs in 2025 estimated to be around 15,000, shown in Table 2.[11]

Table 2: Assumed expenditure for current Mawson catchment

Geography	Assumed population 2025	Adjusted per capita supermarket expenditure	Assumed total supermarket expenditure
Mawson catchment	15,333	$6,448	$98,862,230

Source: SGS Economics and Planning, 2025.

Floorspace demand

The total supermarket expenditure for catchment is then converted to floorspace demand through the use of retail turnover densities (RTDs). SGS standard RTD benchmarks have been based on previous Urbis retail benchmarks,[12] which are derived for typical retail categories and adjusted by the scale of the centre – i.e. how significant the centre is in its wider centre/ retail network. The RTD benchmarks are illustrated in Table 3.

SGS has used the 'sub-regional' categorisation for Mawson, as an approximation to the centres hierarchy (e.g. a Local Centre would be equivalent to the 'Neighbourhood' centre type; a Town Centre would be 'Regional'; Civic would be a 'Major Regional'). The total supermarket expenditure identified for the catchment is then divided by the RTD to identify the potential future demand for supermarket floorspace.

[9] ABS Retail Trade, Australia, released 30/05/2025, https://www.abs.gov.au/statistics/industry/retail-and-wholesale-trade/retail-trade-australia/latest-release
[10] ABS Monthly Household Spending Indicator, January 2025.
[11] ACT Government Population Projections, 2022-2060, accessed 6 May 2025.
[12] See https://urbis.com.au/sector/retail/

Table 3: Retail Turn Over Densities (RTDs) by centre type

	SGS adopted RTD Benchmarks					
Centre type	Supermarket	Other Food	Hospitality	Clothing	Household Goods	Other Retail
Major Regional	$12,082	$19,335	$14,331	$19,335	$19,335	$19,335
Regional	$13,207	$14,760	$13,156	$14,760	$14,760	$14,760
Sub-Regional	$13,298	$10,617	$9,417	$10,617	$10,617	$10,617
Neighbourhood	$13,094	$9,857	$7,798	$9,857	$9,857	$9,857

Source: SGS Economics and Planning, 2024, derived from previous Urbis Retail Benchmarks.

Applying the RTD to the identified expenditure for the population, this results in demand for approximately 7,400 square metres of supermarket floorspace in the existing catchment, as illustrated in Table 4.

Table 4: Current supply and demand for Mawson catchment

Est. Mawson catchment population 2025	Adjusted per capita supermarket expenditure	Assumed total supermarket expenditure	Assumed RTD	Supermarket floorspace demand
15,333	$6,448	$98,862,230	$13,298	7,434 sqm

Source: SGS Economics and Planning, 2025.

The existing supermarket in the Group Centre has a floorspace of 3,150 square metres. Comparing this to the identified demand from the catchment population suggests a potential existing deficit of around 3,900 square metres.

It is important to acknowledge that not everyone who lives in the catchment will necessarily undertake their supermarket shopping in the Group Centre – e.g. some will likely go to the smaller local centres or the Woden Town Centre. As such, Table 5 below compares different rates of supermarket spending leakage to other centres as sensitivity test for the current catchment demand.

Table 5: Sensitivity test – supermarket spending leakage to other centres

Assumed share of spending goes elsewhere	Assumed total expenditure	Assumed RTD	Supermarket floorspace demand	Potential existing gap
0% (as above)	$98,862,230	$13,298	7,434 sqm	3,924 sqm
10%	$88,976,007	$13,298	6,691 sqm	3,181 sqm
25%	$74,146,673	$13,298	5,576 sqm	2,066 sqm
50%	$49,431,115	$13,298	3,717 sqm	207 sqm

Source: SGS Economics and Planning, 2025.

This illustrates that even if 50% of the catchment's supermarket spending goes outside of the Group Centre, there is still potentially a small gap in existing provision without the additional demand from the uplift that may be generated from the master plan.

2.2 Supermarket demand – incoming population

Estimated development population

The two development scenarios (A and B, shown above in Table 1) have a mix of townhouse and apartment dwelling types. To derive the potential future population generated by Option A and Option B respectively, an average persons per household figure has been identified and applied from the 2021 Census for each of the proposed dwelling types. The average figures have been determined based on the Woden district.[13]

For semi-detached townhouses the average is 2.0 people per household, and for flats or apartments 1.8 people per household. This results in a population generated by the future development in the range of 3,124 – 4,050 people, illustrated in Table 6.

[13] This is adapted from ABS Census 2021 Dwelling Structure data from the Woden Valley (SA3) Community Profile, averaging people per household by broad categories ('Semi-detached, row or terrace house, townhouse etc' and Flat or apartment'), see https://www.abs.gov.au/census/find-census-data/community-profiles/2021/80109.

Table 6: Assumed incoming population, Option A and Option B scenarios

Masterplan option	Apartment yield	Avg. persons per household	Townhouse yield	Avg. persons per household	Additional population from Group Centre uplift
Option A	1,693	1.8	0	2.0	**3,124**
Option B	2,171	1.8	22	2.0	**4,050**

Source: SLA, 2025, ABS 2021 Census.

Floorspace demand

The data sources described above have been used to estimate the demand for supermarket floorspace from the potential incoming population in the two development scenarios. Table 7 shows the assumed expenditure for each.

Table 7: Assumed expenditure by development scenario

Scenario	Assumed population	Adjusted per capita supermarket expenditure	Assumed total supermarket expenditure
Option A	3,124	$6,448	$20,139,833
Option B	4,050	$6,448	$26,113,092

Source: SGS Economics and Planning, 2025, based on SLA, 2025, MarketInfo 2016, and ABS Retail Trade, 2025.

Based on the calculated 2025 per capita spending and RTD, this results in projected supermarket floorspace demand generated by the incoming population of 1,515 square metres and 1,964 square metres for the options respectively, as shown in Table 8.

Table 8: Supermarket Floorspace demand generated by development scenarios

Scenario	Total expenditure	Assumed RTD	Supermarket floorspace demand
Option A	$20,139,833	$13,298	1,515 sqm
Option B	$26,113,092	$13,298	1,964 sqm

Source: SGS Economics and Planning, 2025.

This suggests that, on its own, the incoming population generated by the development in the Group Centre under either scenario is likely to be sufficient to support an additional supermarket. Though the identified demand is less than the size of the current full-line supermarket in Mawson (3,150 square metres), across the ACT there have been supermarkets with floorspace in the range of 1,300 to 1,700

square metres as anchors in Group Centres (such as Curtin, Hawker, Charnwood, Kambah, and Calwell).[14]

However, the resulting demand can be highly sensitive to the assumptions used, particularly around the RTDs, which have the potential to fluctuate with different local market factors and higher-level economic conditions, and as such a range of different estimates exist for supermarket performance. As a sensitivity test, Table 9 below summarises the potential demand generated by the development scenarios if different RTDs are applied – indicating that even with much higher RTDs, there is still likely to be demand for, at minimum, a small additional supermarket in the Group Centre. At the extreme low end of the scale the supermarket would likely be a metro-style supermarket rather than a more traditional full line format.

Table 9: Sensitivity test – increased RTDs

Scenario	Total expenditure	Assumed RTD	Supermarket floorspace demand
Option A	$20,139,833	$13,298	1,515 sqm
Option B	$26,113,092	$13,298	1,964 sqm
Option A	$20,139,833	$15,000	1,343 sqm
Option B	$26,113,092	$15,000	1,741 sqm
Option A	$20,139,833	$20,000	1,007 sqm
Option B	$26,113,092	$20,000	1,306 sqm

Source: SGS Economics and Planning, 2025.

When combined with the potential existing gap in provision for the current population, this suggests another supermarket is likely to be supportable in the Group Centre.

2.3 Future needs of the catchment

It is important to note that this calculated demand also does not take into account that there will be population growth in the surrounding catchment that the Group Centre services which will add further to the demand. To understand this, SGS has considered the projected population of the trade catchment suburbs, alongside the future population generated by the reference case development scenarios.

[14] Supermarket floorspace identified in 2018 ACT Commercial and Industrial Areas Floorspace Survey, undertaken by SGS for EPSDD.

Catchment population

Table 10 provides a summary of the projected population in the catchment, Woden district, and the ACT overall from ACT Treasury's current population forecasts.[15]

The Woden District currently accounts for 8.3% of the total ACT population, however the ACT Treasury projections suggest this may decline over the next 20 years. Similarly, the projections currently show a decrease of roughly 770 people within the Mawson Group Centre catchment suburbs over 20 years, likely attributable to demographic factors which inform these projections, including the ageing of the population.

Table 10: ACT Treasury projected populations, 2025-2045

Geography	2025	2035	2045	Change 25-45	% change 25-45
Mawson Group Centre Catchment	15,333	14,725	14,562	-771	-5%
Woden Valley district	40,075	41,570	44,121	4,046	10%
ACT total	483,455	571,260	653,064	169,609	35%

Source: ACT Treasury, ACT Population Projections: 2022-2060.

However, these projections do not necessarily factor in the potential ambition for growth currently being considered in the Stage 2B light rail corridor, nor more recent policy changes such as reforms around 'Missing Middle' housing and 30,000 new homes by 2030 commitment. SGS is aware that ACT Treasury is in the process of updating the ACT's population projections, which may reflect more of this context, including potential additional growth in and around Mawson itself.

For the purposes of this analysis, the current ACT Treasury forecasts have been used, assuming that the uplift envisioned for the Group Centre is likely to be realised within the next 5 to 10 years. The resulting catchment populations for the two scenarios is shown in Table 11.

Table 11: Assumed future catchment populations

Scenario	Projected catchment population 2030	Assumed catchment population including Group Centre uplift 2030	Projected catchment population 2035	Assumed catchment population including Group Centre uplift 2035
Option A	15,141	18,265	14,725	17,849
Option B	15,141	19,191	14,725	18,775

Source: SGS Economics and Planning, 2025, ACT Treasury, ACT Population Projections.

[15] ACT Government Population Projections, 2022-2060, accessed 6 May 2025, https://www.treasury.act.gov.au/snapshot/demography/act

Expenditure and RTDs

Alongside the projected future population, the expenditure and RTD variables have been inflated for future years. The observed change rate in retail turnover in Canberra for food retailing between 2023 and 2025 has been applied – of growth of 3.2% per annum – with the assumed figures for 2030 and 2035 identified in Table 12. Note – this rate of growth has been applied as a broad assumption for the purposes of the analysis, as retail spending and these variables will be subject to a range of factors and potential fluctuations over time.

Table 12: Assumed inputs for 2030 and 2035

Variable	2030	2035
Expenditure per capita	$7,563	$8,875
RTD	$15,597	$18,304

Source: SGS Economics and Planning, 2025.

Demand for supermarket floorspace

Table 13 shows the resulting potential demand in the future years for the catchment, including the future development in the Group Centre. When compared to the existing provision in Mawson, this indicates a substantial gap in supermarket floorspace.

Table 13: Potential supermarket floorspace demand, 2030 and 2035

Scenario	2030	2035	Potential gap 2030	Potential gap 2035
Catchment with Option A	8,856	8,654	-5,346	-5,144
Catchment with Option B	10,819	10,618	-7,309	-7,108

Source: SGS Economics and Planning, 2025.

However, as noted above, this doesn't reflect that some supermarket spending from the catchment will be captured elsewhere. Table 14 below applies the spending leakages from Table 5 above to the respective scenarios and identifies the resulting gap. This indicates that unless more than 50% of catchment's supermarket expenditure is captured elsewhere in future, there is likely to be a sufficient gap to justify at least an additional small supermarket in the Group Centre.

Table 14: Sensitivity test – supermarket spending leakage to other centres and gap

Assumed share of spending goes elsewhere	Potential gap 2030	Potential gap 2035
Catchment with Option A		
0% (as above)	-5,346	-5,144
10%	-4,460	-4,279
25%	-3,132	-2,981
50%	-918	-817
Catchment with Option B		
0% (as above)	-7,309	-7,108
10%	-6,228	-6,046
25%	-4,605	-4,453
50%	-1,900	-1,799

Source: SGS Economics and Planning, 2025.

3. Conclusions

3.1 Typical supermarket floorspace

The typical size of a full line supermarket has grown over time as in-store offerings have changed. Recent examples in the Canberra context include 3,000 square metres for the recently opened Harris Farm in Majura Park,[16] and 4,900 square metres for the newly delivered full line Coles supermarket at Dickson Village.[17] More established stores in other Group Centres in the ACT have been as small as 1,300 square metres.

As noted in the analysis, the existing Woolworths supermarket in Mawson is just over **3,500 square metres in size.**

3.2 Demand from Group Centre development

The proposed development identified in the reference case for the Master Plan is estimated to generate a population of between 3,100 and 4,000 people on completion. Based on the assumptions detailed in this analysis, this will potentially generate demand for between approximately 1,500 and 1,900 square metres of supermarket floorspace.

This suggests that there is likely to be sufficient demand from the incoming population alone to support an additional supermarket in the Group Centre.

3.3 Additional factors potentially increasing demand

The analysis of current provision against potential demand from the current population also suggests that there may be **an existing gap in provision of supermarket floorspace for the overall catchment, depending on how much of the spending of the retail trade catchment is captured locally**.

While the analysis is subject to sensitivities in the assumptions, **considering the future population in the wider retail catchment surrounding Mawson also indicates a potential gap in provision.**

Also important to note is that the population that the Group Centre is serving in future could also be higher than that currently projected – as a result of planning for light rail to Woden and associated uplift,[18] as well as the recently announced missing middle changes[19] – and therefore the demand for supermarket floorspace could in fact be higher.

[16] I2C Architects, Harris Farm Majura Park August 2024, https://i2c.com.au/harris-farm-majura-park/
[17] Dan Jervis-Bardy, Coles' $69m plan for Dickson housing and shopping complex unveiled, The Canberra Times, January 22 2019, https://www.canberratimes.com.au/story/5996542/coles-69m-plan-for-dickson-housing-and-shopping-complex-unveiled/
[18] ACT Built for CBR Infrastructure Update, Light Rail to Woden.
[19] ACT Missing Middle Housing Reforms, May 2025.

3.4 Caveats

There are some caveats to note with the analysis:

- This market analysis has been undertaken at a high level, and changes in the assumptions used may change the results. Changes in retail expenditure patterns and inflation fluctuations will impact on the future pool of retail expenditure available to be captured by the proposed supermarket
- SGS has utilised industry standard datasets which are able to reflect spatial differences in retail spending patterns – i.e. so it is able to reflect that spending in the catchment is different to other locations – however some of this data is older. More recent and/ or detailed estimates of spending could be used as they become available.[20].
- This assessment has not included modelling of the retail system. The analysis has not considered the potential impact of a second supermarket on the wider retail network and whether the impact would be of sufficient scale to affect the role and function of existing centres. This kind of impact assessment would need to be considered in planning strategically for the centre and the wider district.

[20] Packaged credit card expenditure data is available for purchase through various business. This is up to date and detailed but only covers some credit card users. Local shopper surveys could be conducted to provide full coverage – this would offer the most accurate and up to date information but is relatively costly and time consuming.

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