



# Retail Policy Framework for Cobram and Yarrawonga: Options Report

Moira Shire Council

July 2017

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## Glossary

**Conventional Retail** – Retail activities that focus on the following ANZSIC subdivision categories: Food retailing; Store-based retail; Vacant retail buildings; and Food and beverage services.

**Estimated Retail Floor Space** – The estimated gross floor space used for retail purposes.

**Estimated Resident Population** – The estimated usual residents of a statistical area.

**Indicative Primary Retail Catchment Area** – The theoretical retail catchment area where the subject town centre is considered to be the preferred retail centre for the population, calculated by Euclidean buffers around key retail centres and estimated traveling times between centres.

**Retail** - Land use mainly engaged in the purchase and/or onselling of goods without significant transformation to the general public, as classified under Division G – Retail Trade under ANZSIC.

## Report statement

The Retail Policy Framework for Cobram and Yarrawonga: Options Report has been prepared specifically for Moira Shire Council as the client. The report builds on the findings of the Background Analysis Report prepared for the project.

The Retail Policy Framework for Cobram and Yarrawonga: Options Report and its contents are not to be referred to, quoted or used by any party in any statement or application, other than by Moira Shire Council without written approval from SED.

The information contained in this document has been gained from anecdotal evidence and research. It has been prepared in good faith and in conjunction with Moira Shire Council. Neither SED, nor its servants, consultants, agents or staff shall be responsible in any way whatsoever to any person in respect to the report, including errors or omission therein, however caused.

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## 1. Introduction

The Moira Shire Council is seeking policy direction to guide retail development in the towns of Cobram and Yarrawonga, with a specific focus on the town centres of these major towns within the municipality.

Key findings from the *Background Analysis Report* will inform the policy options and recommended strategic direction for retail development in Cobram and Yarrawonga.

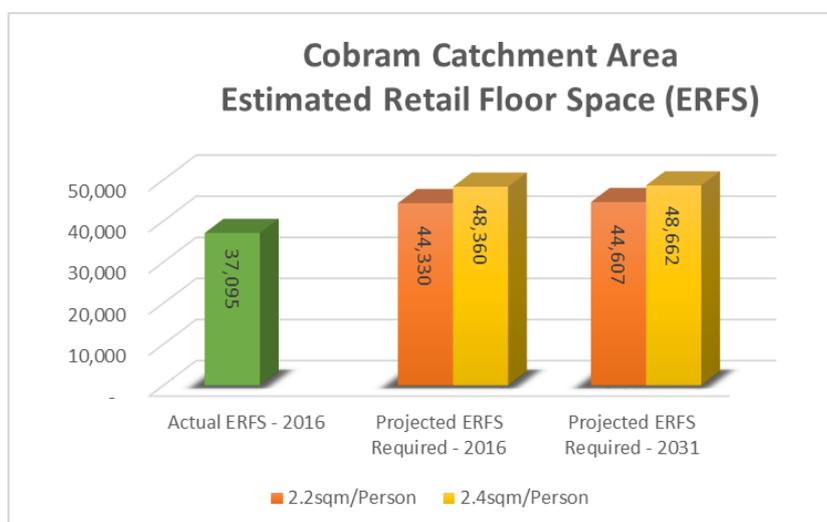
A summary of key findings are:

- The indicative combined Estimated Resident Population (ERP) for the Cobram and Yarrawonga town centres in 2015 is calculated at approximately 34,440.
- The ERP for the estimated catchment area for the Cobram town centre is approximately 20,150 and 16,290 for the Yarrawonga town centre.
- The Estimated Resident Population of the Moira Shire is projected to increase to 32,043 by 2031.
- The resident population for the indicative Primary Retail Catchment is estimated to grow by 2,105 to approximately 38,545 by 2031; Cobram's catchment growing by over 126 people and Yarrawonga's catchment by over 1,980. Note these figures do not include seasonal workers or tourists within the catchment.
- The retail offer in Cobram, in terms of range of goods and services, is considered good for the catchment size and vacancy rates are low (approximately 4% of total retail floor space). Revitalisation of some areas have occurred and a number of newer developments support the floor space supply and range of services/goods within the town centre.
- The retail offer in Yarrawonga in terms of range of goods and services is considered very good for the catchment size and vacancy rates are low (approximately 5% of total retail floor space). A number of new developments support the floor space supply and range of services/goods within the town centre, most notably in the southern end of the town centre.
- The combined conventional retail floor space for Cobram and Yarrawonga is estimated to be 77,277m<sup>2</sup>. With the estimated floor space of existing supermarkets in other centres located within the indicative primary catchment included, the total conventional retail floor space for the catchment is estimated at 84,432m<sup>2</sup>.
- Tourism represents around 30% of output, 27% of value added and 28% of employment within the retail and food and accommodation sectors of the Moira Shire. Of the total used retail and food and accommodation floor space of 80,023m<sup>2</sup> in Cobram and Yarrawonga town centres, an estimated 8,330m<sup>2</sup> (10.4%) is tourism related.
- The estimated existing retail floor space allocation for Cobram and Yarrawonga's catchment areas are summarised in Table 1.
- The indicative retail catchment for Yarrawonga has a per capita retail floor space allocation of 2.39m<sup>2</sup>, whilst Cobram's is significantly lower at 1.84m<sup>2</sup>.

	Cobram Catchment	Yarrawonga Catchment	Total Catchment
Estimated Retail Floor Space (town centre and developed commercial land)	34,457 m <sup>2</sup>	42,820 m <sup>2</sup>	77,277 m <sup>2</sup>
Other supermarkets in centres within the primary catchment area	5,935 m <sup>2</sup>	1,220 m <sup>2</sup>	7,155 m <sup>2</sup>
<b>Total Estimated Retail Floor Space</b>	<b>40,392 m<sup>2</sup></b>	<b>44,040 m<sup>2</sup></b>	<b>84,432 m<sup>2</sup></b>
Tourism retail floor space component	3,297 m <sup>2</sup>	5,033m <sup>2</sup>	8,330 m <sup>2</sup>
<b>Total Estimated Retail Floor Space without tourism component</b>	<b>37,095m<sup>2</sup></b>	<b>39,007 m<sup>2</sup></b>	<b>76,102 m<sup>2</sup></b>
Per Capita retail floor space allocation without tourism component	1.84	2.39	2.09

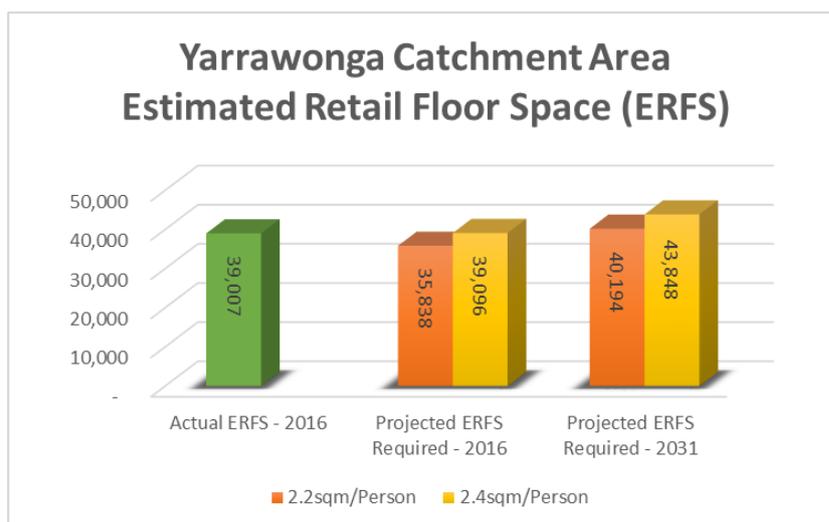
**Table 1: Estimated Existing Retail Floor Space Allocation for Cobram and Yarrawonga Catchment Areas**

- Should a ratio of 2.2m<sup>2</sup> be applied to the Cobram catchment area an additional 7,512m<sup>2</sup> retail floor space will be required by 2031. Should a ratio of 2.4m<sup>2</sup> be applied to the Cobram catchment area an additional 11,567m<sup>2</sup> retail floor space will be required by 2031. Note the tourism component are not included in these figures.



**Figure 1: Current and future Estimated Retail Floor Space for the Cobram catchment area**

- Should a ratio of 2.2m<sup>2</sup> be applied to the Yarrawonga catchment area an additional 1,187m<sup>2</sup> retail floor space will be required by 2031. Should a ratio of 2.4m<sup>2</sup> be applied to the Yarrawonga catchment area an additional 4,841m<sup>2</sup> retail floor space will be required by 2031. Note the tourism component are not included in these figures.



**Figure 2: Current and future Estimated Retail Floor Space for the Yarrawonga catchment area**

- Projections estimate additional demand by 2031 resulting from tourism in Yarrawonga will be around 810m<sup>2</sup> and in Cobram, 391m<sup>2</sup>.
- The analysis show that additional retail floor space is required to service the catchment's ERP to a theoretical per capita allocation of both 2.2m<sup>2</sup> and 2.4m<sup>2</sup>. Whilst this allocation does not include the demand generated by seasonal workers, it does provide support for additional floor space in the catchment that will in effect also service this market. The impact any potential leakage of retail trade to other centres have not been included as yet; this will be considered in the policy directives of the study. Yarrawonga's projected floor space shortfall is mainly attributed to projected population growth in the catchment area supported by tourism, whilst Cobram has an existing shortfall combined with modest population growth in the catchment area.

Component	Cobram Catchment	Yarrawonga Catchment	Combined Catchment
Retail floor space required to meet 2.2m <sup>2</sup> per capita ERP for 2016 (current vacant floor space included)	7,235m <sup>2</sup>	-3,169m <sup>2</sup>	11,354m <sup>2</sup>
Retail floor space required to meet 2.2m <sup>2</sup> per capita ERP by 2031	277m <sup>2</sup>	1,187m <sup>2</sup>	5,054m <sup>2</sup>
Retail floor space required to meet tourism growth to 2031	391m <sup>2</sup>	810m <sup>2</sup>	1,201m <sup>2</sup>
<b>TOTAL</b>	<b>7,903m<sup>2</sup></b>	<b>-1,172m<sup>2</sup></b>	<b>6,731m<sup>2</sup></b>
Retail floor space required to meet 2.4m <sup>2</sup> per capita ERP for 2016 (current vacant floor space included)	11,265m <sup>2</sup>	89m <sup>2</sup>	11,354m <sup>2</sup>
Retail floor space required to meet 2.4m <sup>2</sup> per capita ERP by 2031	302m <sup>2</sup>	4,752m <sup>2</sup>	5,054m <sup>2</sup>
Retail floor space required to meet tourism growth to 2031	391m <sup>2</sup>	810m <sup>2</sup>	1,201m <sup>2</sup>
<b>TOTAL</b>	<b>11,958m<sup>2</sup></b>	<b>5,651m<sup>2</sup></b>	<b>17,609m<sup>2</sup></b>

**Table 2: Projected Retail Floor Space Demand to 2031**

- The catchment size of both town centres benefit from having centralised town centres and retail development that generate economies of scale. The current development pattern and available commercial zoned land generally supports integrated development outcomes and can accommodate projected future demand.
- Specific sites may however require further consideration to ensure strategic developments can be facilitated in the catchment area to support both projected demand for local retail needs and potentially reduce higher order retail and comparison shopping currently accessed in larger centres.

## 2. Policy Statement and Guiding Principles

### 2.1 Policy Statement

A clear policy statement for retail development will support investment and development decision-making in Cobram and Yarrawonga. The following policy statement is proposed:

Retail use and development Cobram and Yarrawonga will provide choice and diversity for local residents, support local employment and tourism, and reduce escape expenditure to other centres.

### 2.2 Guiding Principles

A set of guiding principles will provide the strategic direction for retail development in Cobram and Yarrawonga. The guiding principles need to support current and future policy direction, and act as set of criteria to guide decision-making regarding retail development in both Cobram and Yarrawonga.

The following guiding principles are proposed to support future retail development, based on key directives from relevant policy and the findings of the background analysis:

- Facilitate the expansion and diversification of retail use and development to improve choice, range and diversity of offer.
- Encourage the provision of higher order goods in order to reduce travel requirements by residents and reduce potential expenditure leakage to other commercial centres.
- Focus retail floor space growth within town centres, existing zoned areas and planned nodes.
- Encourage retail activities to locate in town centres that have a market of an appropriate scale for viability to maximise demand.
- Discourage retail development outside town centres and planned retail nodes.
- Encourage restricted retail and bulky goods uses to locate outside core retail areas in locations with good access and exposure.
- Seek the relocation of inappropriate, non-core uses in the town centre to more suitable and appropriately zoned sites.
- Encourage the provision of adequate land supply to accommodate restricted retail and bulky goods developments that require large floor plates.
- Ensure appropriate public investment in town centres to support retail use and development.
- Encourage longer trading hours for retail premises to support tourism and town centre activation.
- Pursue the development of active shop fronts and high quality urban design.
- Facilitate renewal and consolidation of town centres by maintaining the compact nature of existing town centres to intensify retail and commercial uses and the redevelopment of vacant and underutilised sites.
- Encourage utilisation of existing infrastructure and effective provision car parking for new developments.
- Promote mixed use development and integration of tourism, retailing and residential uses at appropriate locations in town centres to support retail development.
- Support development in locations that contribute to making town centres vibrant and accessible by all means of transport and encourage walking and cycling.

### 3. Strategic Retail Floor Space Targets (Per Capita)

#### 3.1 Purpose

The theoretical average<sup>1</sup> of retail floor space provision for Australia is estimated at around 2.2m<sup>2</sup> to 2.4m<sup>2</sup> per person. This estimate generally includes floor space in all locations where the estimated catchment population have retail expenditure, thereby including potential escape expenditure between centres.

In a policy context, per capita retail floor space allocations can be used for:

- Analysing retail supply and demand - determining the amount of retail floor space provided per person and analysing potential export to other centres or import from other centres.
- Setting of strategic targets for retail provision in town centres to support planning and economic development. Specifically, strategic support for the growth of centres and/or reduction of escape expenditure can be provided. Targets can be tailored to acknowledge existing retail expenditure patterns, provide strategic direction for reduced leakage to other centres, and support increased expenditure from other catchment areas (net import).

A strategic decision for Council is deciding on the desired/appropriate per capita retail floor space allocation for each centre to inform policy direction and deliver the associated policy and economic development outcome sought.

The accepted standard of 2.2m<sup>2</sup> will generally ensure strategy and policy support for enough retail development to adequately service the catchment, and this is recommended as the minimum target ratio. A higher ratio (e.g. 2.4m<sup>2</sup>) will theoretically provide support for a larger amount of retail floor space to support development on a strategic level; the intent could be to support retail development that inter alia pro-actively cater for population growth, reduce potential leakage of expenditure in the catchment to other centres by increasing choice or product range, or include planning for tourism and seasonal workers.

The per capita retail floor space allocation for each centre does not have to be the same; the allocation could be tailored to support the specific function of the centre within the Moira Shire Council.

**Recommendation:**

*Utilise per capita retail floor space allocations for each catchment area to inform retail floor space targets and associated policy direction.*

#### 3.2 Cobram

The current per capita retail floor space estimate (without the tourism component) for Cobram is 1.85m<sup>2</sup>. Vacancies rates are low at approximately 4% of retail floor space. The 1.85m<sup>2</sup> ratio indicates:

- A potential under supply of retail floor space within the catchment area based on the estimated population the catchment serves.
- The population spread across a relatively large area with multiple larger centres potentially impacting on the catchment area.
- A potential leakage to other surrounding centres for higher order goods.

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<sup>1</sup> Various sources identify a range of 2.2m<sup>2</sup> to 2.4m<sup>2</sup> retail floor space per person in Australia.

The Cobram catchment is characterised by the main town centre in Cobram, a number of smaller supermarkets in surrounding towns, average population growth, with tourists and seasonal workers at certain times of the year.

When a per capita retail floor space ratio of 2.2m<sup>2</sup> is applied to the catchment and the projected demand from tourism is included, approximately 7,900m<sup>2</sup> additional retail floor space is required by 2031, noting that a significant proportion is due to a current projected shortfall. This could accommodate a full-line supermarket, a small discount department store (DDS), and additional retail and restricted-retail floor space in the catchment.

Should a ratio of 2.4m<sup>2</sup> be applied to the catchment and the projected demand from tourism is included,, approximately 11,950m<sup>2</sup> additional retail floor space is required by 2031; 4,050m<sup>2</sup> more than the 2.2m<sup>2</sup> estimate above. This could accommodate a full-line supermarket, a DDS, and additional retail and restricted-retail floor space (including bulky goods) in the catchment.

The potential negative impact of expanding the retail sector in Cobram on existing retailers is expected to be minimal given the estimated shortfall at present, however development should:

- be located so that it supports the overall functioning of the town centre and create economies of scale
- create additional retail floor space at a scale consistent with exiting demand
- increase choice and diversity of the retail offer.

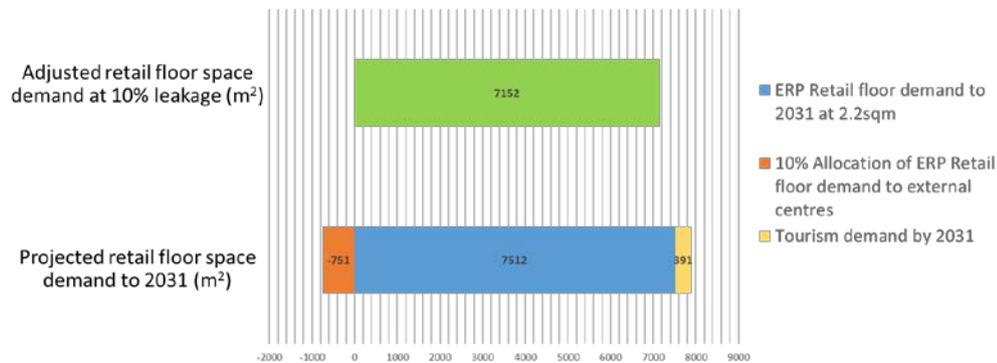
The positive impact will be increased trade due to reduced leakage to other centres, new investment and new anchor tenants (potentially national retailers) in the town centre.

The contribution of seasonal workers, moving into the primary catchment area to support harvesting and agricultural activities, to floor space demand has not been quantified given its fluctuating nature. The seasonal influx of workers will increase retail demand and support retail activities in the catchment area, specifically daily needs trading in Cobram. Theoretically a per capita floor space allocation of 2.4m<sup>2</sup> could applied (being the upper-limit of accepted standards) to make provision for seasonal workers and the associated retail floor space demand in planning for the town centre; however quantifying the demand from seasonal workers in this way is an imprecise approach and not evidence based, and therefore not recommended.

Informed by the Cobram catchment area's characteristics, projected population growth and estimated current shortfall of retail floor space, a per capita retail floor space ratio of 2.2m<sup>2</sup> is considered appropriate. This will provide a strong balanced policy directive for the growth, development and consolidation of the Cobram town centre. Increasing overall existing floor space to a per capita allocation of 2.2m<sup>2</sup> has the strategic benefit of encouraging retail supply (and associated choice and range) in the catchment to reduce potential existing leakage to other larger centres and strengthen the town centre by increasing economies of scale. Whilst this allocation does not include the demand generated by seasonal workers, it does provide support for additional floor space in the catchment that will in effect also service these markets.

Policy direction derived from a per capita retail floor space ratio of 2.2m<sup>2</sup> should make provision for leakage to other larger centres as not to overstate potential floor space demand in Cobram, noting that the policy directive proposed aimed at reducing leakage over time by increasing retail choice and diversity in Cobram. Reducing the projected floor space demand of 7,900m<sup>2</sup> with a percentage allocation for leakage will make provision for this potential impact on floor space demand. Should a 10% allocation be applied for leakage, the projected additional retail floor space for Cobram is reduced to approximately 7,150m<sup>2</sup>.

Although the projected additional retail floor space for Cobram has been calculated at 7,150m<sup>2</sup> by 2031 (including tourism and escape expenditure), it is worth noting that over 6,500m<sup>2</sup> of this projected demand is a projected current shortfall<sup>2</sup>.



**Figure 3: Projected Retail Floor Space Demand for Cobram Providing for Leakage to Other Centres**

## Recommendations

- Apply a retail floor space target of 2.2m<sup>2</sup> per capita for Cobram.
- Plan for approximately 7,150m<sup>2</sup> additional retail floor space in Cobram by 2031.
- Ensure new retail development in Cobram:
  - is located so that it supports the overall functioning of the town centre and create economies of scale
  - create additional retail floor space at a scale consistent with exiting demand; and
  - increase choice and diversity of the local retail offer.

### 3.3 Yarrawonga

The current per capita retail floor space allocation (without the tourism component) for Yarrawonga is estimated at 2.39m<sup>2</sup>. Vacancies rates are low at approximately 5% of retail floor space. The ratio indicates:

- A strong supply of food and beverage retailing that attract trade from both the local and surrounding catchment areas, also supported by the tourist market.
- New developments and recent re-developments that provide for the growing needs of the catchment and upgraded the town centre.
- Increase in the retention of trade within the catchment and reduced leakage to other surrounding centres for higher order goods (for example the new Bunnings store).

The Yarrawonga catchment is characterised by one main town centre in Yarrawonga and only one other centre with a smaller supermarket, strong population growth, and a strong tourism component.

<sup>2</sup> A figure of 6,500m<sup>2</sup> retail floor space is derived by applying a 10 percent leakage allocation to the projected 2016 floor space calculation of 7,235m<sup>2</sup> in Table 2.

When a ratio of 2.2m<sup>2</sup> is applied to the catchment and the projected demand from tourism is included, there is a projected over supply of 1,170m<sup>2</sup> retail floor space by 2031. This does not theoretically allow expansion of the retail offer in Yarrawonga.

Should a ratio of 2.4m<sup>2</sup> be applied to the catchment and the projected demand from tourism is included, approximately 5,650m<sup>2</sup> additional retail floor space is required by 2031. This can accommodate a supermarket, a small DDS and additional retail and restricted-retail floor space in the catchment.

Given the current balance between estimated supply and demand (with demand from projected population growth included), additional retail floor space should preferably support the strategic functioning of the Yarrawonga town centre by increasing choice and diversity, reducing potential leakage to other catchments, support tourism and ensure the potential negative impact on existing retailers is minimised.

Informed by the Yarrawonga catchment area’s characteristics, projected population and tourism growth, and the current supply of retail floor space, a per capita retail floor space ratio of 2.4m<sup>2</sup> is considered appropriate for Yarrawonga. This will provide a strong policy directive for the growth, development and consolidation of the Yarrawonga town centre into the future. Noting the current theoretical balanced supply and demand, the increase in floor space to 2031 should be commensurate to growth in demand to encourage retail supply (and associated choice and range) in the catchment. Future growth will be required to reduce potential existing leakage to other larger centres and strengthen the town centre by increasing economies of scale. Maintaining the per capita retail floor space allocation at 2.4m<sup>2</sup> has the strategic benefit of supporting retail supply (and associated choice and range) in the catchment to reduce potential existing leakage to other larger centres and embed Yarrawonga’s role a key centre in the region.

Policy direction derived from a per capita retail floor space ratio of 2.4m<sup>2</sup> should make provision for leakage to other larger centres as not to overstate potential floor space demand in Yarrawonga, noting that the policy directive proposed aims at keeping leakage to a minimum and encourage retail choice and diversity. Reducing the projected floor space demand of approximately 5,650m<sup>2</sup> with a percentage allocation for leakage will make provision for this potential impact on floor space demand. Should a 10% allocation be applied for leakage, the projected additional retail floor space for Yarrawonga is reduced to approximately 5,150m<sup>2</sup>.

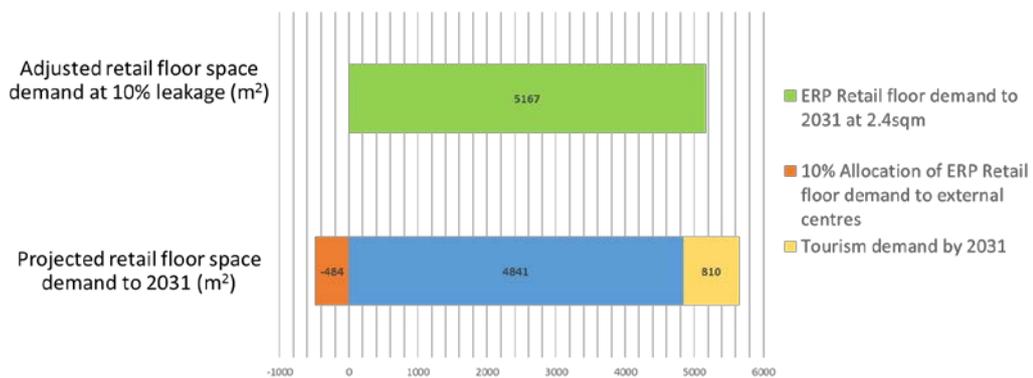


Figure 4: Projected Retail Floor Space Demand for Yarrawonga Providing for Leakage to Other Centres

## Recommendations

- Apply a retail floor space target of 2.4m<sup>2</sup> per capita for Yarrawonga.
- Plan for approximately 5,150m<sup>2</sup> additional retail floor space in Yarrawonga by 2031.
- Ensure new retail development in Yarrawonga:
  - is located so that it supports the overall functioning of the town centre and create economies of scale
  - supports projected population and tourism growth
  - create additional retail floor space at a scale consistent with exiting demand; and
  - increase choice and diversity of the local retail offer.

## 4. Strategic Locations for Retail Development and Available Land Supply

### 4.1 Yarrawonga

Yarrawonga currently has a projected per capita retail floor space allocation of 2.39m<sup>2</sup>. The projected retail floor space needs for Yarrawonga to maintain a 2.4m<sup>2</sup> ratio by 2031 are calculated at approximately 4,750m<sup>2</sup>. When growth in tourism is included and allocation is made for potential leakage, approximately 5,150m<sup>2</sup> new retail floor space is required by 2031.

This theoretical 2031 floor space demand estimate will require between 1.25 ha and 1.47 ha zoned commercial land when a coverage of 35-40% is applied.

Yarrawonga currently has approximately 2.6 ha of Commercial 1 Zone (C1Z) and 17.16 ha of Commercial 2 Zone (C2Z) vacant land. The location of the existing zoned land supply are indicated below. On a theoretical basis, Yarrawonga has ample zoned land supply to cater for the projected retail floor space needs to 2031 and beyond.

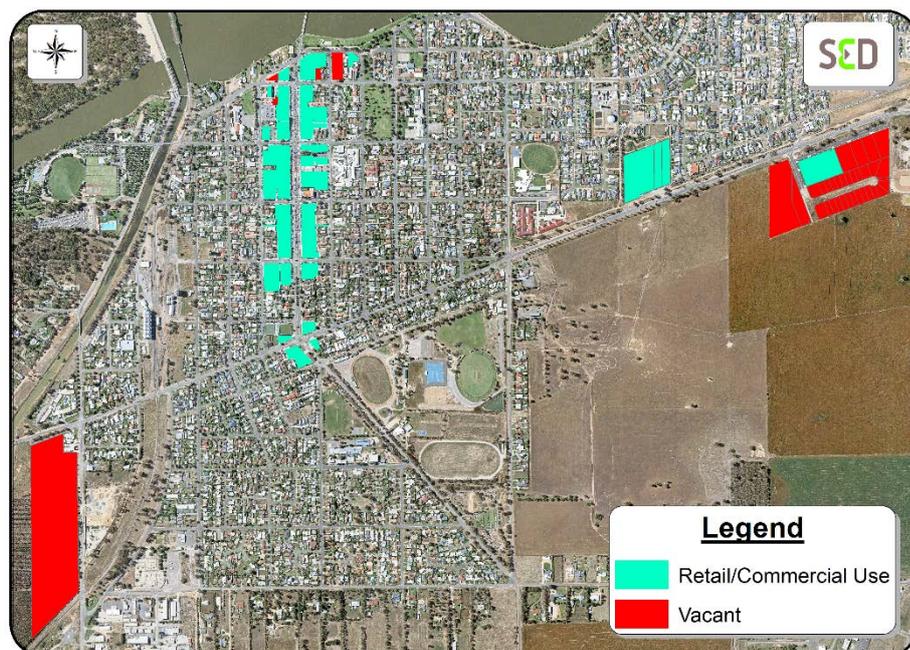


Figure 5: Vacant Zoned Commercial Land in Yarrawonga

#### 4.1.1 Key opportunities

The current spatial form of commercially zoned land in Yarrawonga supports:

- A compact centralised town centre functioning around Belmore Street.
- Restricted retail (hardware) developments in decentralised locations within the C2Z with frontage to the Murray Valley Highway.
- Limited retail development clustered around the Belmore Street/Murray Valley Highway intersection within the General Residential Zone, including convenience restaurants and a service station.

Yarrawonga has limited zoned land in the town centre to accommodate retail development or retail expansion. A limited number of properties used for residential purposes are available for conversion to retail use, however most of these do not have frontage to Belmore Street or main retail streets and will most likely be suitable for non-retail commercial development.

Based on current vacant zoned land and Planning Scheme provisions, retail expansion can occur in several locations (refer map below). These locations are further investigated to inform policy direction and include:

- Current vacant zoned land (both C1Z, C2Z and MUZ).
- Land along Belmore Street, south of the current town centre, identified in the Planning Scheme as suitable for 'complimentary business' development.
- Land along the proposed new alignment of the connection to the Murray Valley Highway (identified by the *Moira Shire Economic Analysis* as an investigation area).
- The old Yarrawonga Saleyards site (identified by Council as an investigation area).

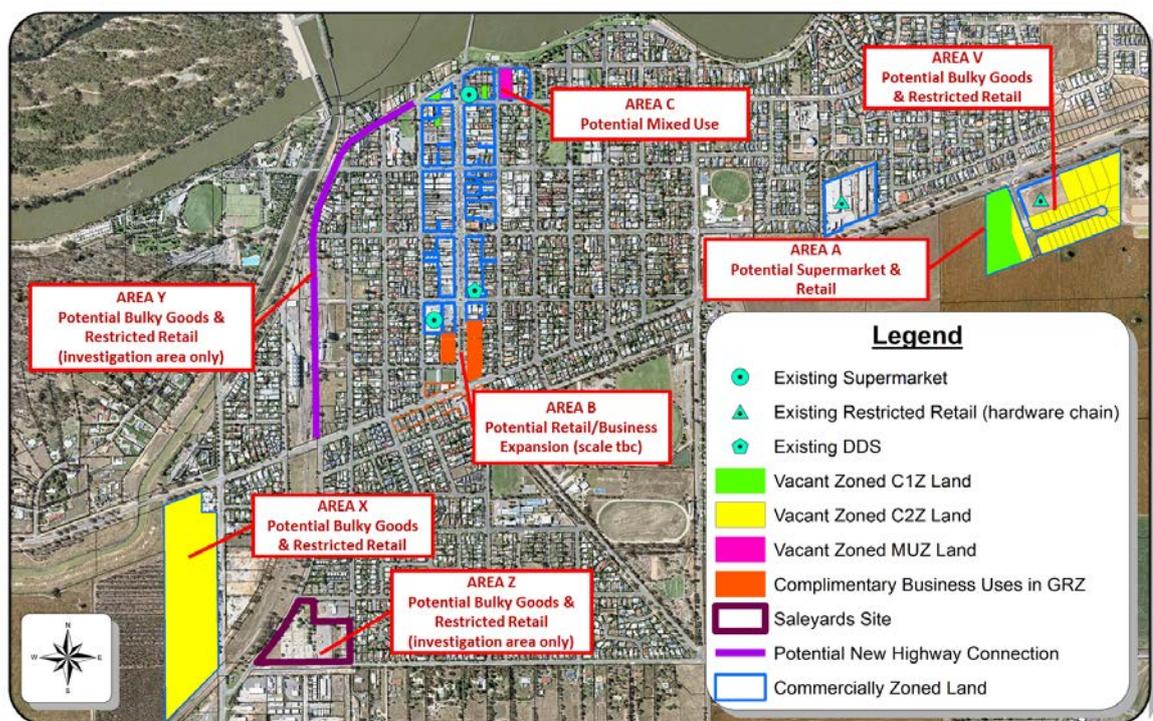


Figure 6: Potential Retail Expansion Areas - Yarrawonga

#### 4.1.1.1 Conventional Retail (C1Z)

##### AREA A - LAND ZONED C1Z AND LOCATED ALONG THE MURRAY VALLEY HIGHWAY, DIRECTLY WEST OF THE NEW BUNNINGS DEVELOPMENT.

This site forms part of a planned retail and commercial node along the Murray valley Highway. The site is adequately sized to accommodate a new full-line supermarket and additional retail development in a decentralised location to service the new residential developments to the east of the town centre. Should it be assumed 35-40% of this land is available for retail floor space once developed, this site alone can potentially accommodate 9,100-10,500m<sup>2</sup> of new retail floor space; double the projected amount of floor space required by 2031.



The land is subject to a Development Plan Overlay (DPO7) which requires an Economic Impact Assessment for the development of a supermarket to demonstrate the level of demand and the degree the development would impact the Yarrawonga town centre.

A planning permit for a supermarket was approved for this site, however the permit has now lapsed. Given the continued residential growth proximate to this site and the completion of the new Bunnings directly adjacent, the viability of retail development in the near future on the site is likely to increase. The land has already been subdivided and is development ready.

No further action is required for this area. The C1Z will facilitate retail development through a planning permit application, when the land owners are ready to develop the site. The extensive contribution this node makes to the zoned land supply for C1Z in Yarrawonga is noted.

##### AREA B - LAND LOCATED ALONG BELMORE STREET, SOUTH OF THE EXISTING TOWN CENTRE

The current Planning Scheme identifies the area between the town centre and the Murray Valley Highway as suitable for 'complimentary business uses', noting that a map with the dimensions of the area is not included. The land is not covered by a heritage overlay and the existing housing stock generally will enable redevelopment.



**Figure 7: Retail Uses at the Belmore Street / Murray Valley Highway Intersection**

For the purposes of this report and associated analysis, the area is divided into a *core area* ending at the Belmore Street / Murray Valley Highway, and a *secondary area* that extends west along the Murray Valley Highway up to Thorn Street.



**Figure 8: Potential Retail Development Area South of the Town Centre**

The *core area* is strategically located along Belmore Street between the existing town centre and the Murray Valley Highway. The *core area* is part of the area delineated in the revised Municipal Strategic Statement (MSS) for 'complimentary business uses'.



**Figure 9: Existing residential development along the southern section of Belmore Street**

The *core area* is discussed in the *Yarrawonga Futures Plan 2006* (section 8.3.2 Southern Mixed Use Precinct), and potential uses include 'retailers seeking larger floor areas'. It should be noted that the plan includes all the land along Belmore Street between McNally Street and Murray Valley Highway - a significant northern section of this land is currently zoned C1Z and developments include the new Woolworths which occurred since the preparation of the plan in 2006. The plan recommended that this area be rezoned to MUZ however this has not occurred. Limited retail and mixed use development (in the form of convenience restaurants, liquor retail and a service station) have however occurred on the land around the Belmore Street / Murray Valley Highway intersection since the adoption of the plan.

The *secondary area* is delineated in the revised Municipal Strategic Statement (MSS) and includes a significant amount of properties along the Murray Valley Highway (refer map below). 'Complimentary business uses' are supported in this location, noting that retail is not specifically included or excluded.

There is scope to refine and clarify the land use direction for this area, to facilitate appropriate development and provide certainty to land owners and developers. Given that the projected retail floor space demand for 2031 can be accommodated within existing C1Z zoned areas, any options considered should be informed by strategic outcomes sought; support for retail development in this location is not based on a lack of zoned land supply but rather the strategic extension of the town centre towards existing business uses (including the KCF and McDonalds) and providing additional commercial development opportunity in a centralised location.

The options are:

- a) Rezone the *core area* (land fronting on to Belmore Street, north of the Murray Valley Highway) to MUZ and retain the GRZ for the *secondary area* (remaining land).



Figure 10: Potential MUZ application south of the town centre

The implications under Planning Scheme zoning provisions are:

#### MUZ Area

- *Shop and food and drink premises* use with a floor area of less than 150m<sup>2</sup> will not require a permit, with any use larger than 150m<sup>2</sup> permissible through a planning permit.
- Other *retail premises* will require a planning permit.
- *Office, medical centre and place of assembly* uses with a floor area of less than 250m<sup>2</sup> will not require a permit, with any use larger than 250m<sup>2</sup> requiring a planning permit.
- Residential uses are permitted, with *accommodation* uses requiring a permit.
- *Industry* uses are permitted with a permit (excluding uses with adverse amenity potential).
- The land area could support an estimated 3,000-4,000m<sup>2</sup> of retail floor space, depending on the development proposal and land consolidation.

The MUZ is a more appropriate zone than the current GRZ, should complimentary business uses' be desired; specifically small food and drink premises, office, retail and medical centre development will be supported as of right. The MUZ will also support larger retail development through a planning permit process. Accommodation will also be supported through a planning permit.

#### GRZ Area

- *Car wash, convenience restaurant, service station and take away food premises* uses will require a permit. These sites must however adjoin a road in the Road Zone (e.g. Murray Valley Highway)
- Conventional *retail premises* and *industry* uses will not be allowed.
- *Medical centre* and *place of assembly* uses floor area will be limited to 250m<sup>2</sup>, with no permit required. These sites must however adjoin a road in the Road Zone (e.g. Murray Valley Highway)
- *Accommodation, food and drink premises, and place of assembly* uses will require a permit.

The GRZ will support complimentary business uses of a smaller scale, whilst not significantly extending the CBD or adding substantial retail floor space that could impact the town centre.

- b) Rezone the *core area* (land fronting on to Belmore Street, north of the Murray Valley Highway) to C1Z and retain the GRZ for the *secondary area* (remaining land).



**Figure 11: Potential extension of C1Z south of the town centre**

The implications are:

#### **C1Z Area**

- Retail development (including a *shop*) will not require a permit.
- *Office* development will not require a permit.
- *Accommodation* uses will not require a permit if integrated with commercial development with a frontage not exceeding 2m at ground floor.
- The land area could support an estimated 3,000-4,000m<sup>2</sup> of retail floor space, depending on the development proposal and land consolidation.

The C1Z is a more appropriate zone than the current GRZ or the MUZ, should retail development and complimentary business uses' be desired as of right without a permit, specifically shops and other retail uses. Stand-alone accommodation uses will however not be supported.

#### **GRZ Area**

- *Car wash, convenience restaurant, service station and take away food premises* uses will require a permit. These sites must however adjoin a road in the Road Zone (e.g. Murray Valley Highway)
- Conventional *retail premises* and *industry* uses will not be allowed.
- *Medical centre* and *place of assembly* uses floor area will be limited to 250m<sup>2</sup>, with no permit required. These sites must however adjoin a road in the Road Zone (e.g. Murray Valley Highway)
- *Accommodation, food and drink premises, and place of assembly* uses will require a permit.

The GRZ will support complimentary business uses of a smaller scale, whilst not significantly extending the CBD or adding substantial retail floor space that could impact the town centre.

It should be noted that the inclusion of land fronting onto Hovel Street and Hume Street have been excluded to retain the residential character of these streets; development is only proposed for land fronting Belmore Street (consistent with the revised MSS demarcation). This is consistent with the current development pattern of the Yarrowonga town centre south of Orr Street. However, the ultimate boundary

of the C1Z area will be confirmed through a rezoning application and associated supporting documentation provided by the proponent, determining the actual development area boundary and extent of the C1Z area. Any new retail development should include urban design outcomes that ensure appropriate interface treatments and development outcomes with surrounding residential development.

A combination of the C1Z and GRZ will:

- Support the extension of the town centre to the Murray Valley Highway interface for commercial and/or retail development by adding a limited amount of C1Z to the zoned land supply of the town centre, to primarily support the strategic extension of the town centre with retail and commercial development up to existing development at the intersection of Belmore Street and Murray Valley Highway. The C1Z could support the development of a new DDS or small supermarket in this location in the medium to long term.
- Enable complimentary business uses to occur along the Murray Valley Highway proximate to the town centre entrance at the southern end of Belmore Street, capitalizing on the exposure provided for complimentary business uses in this location.

The Moira Planning Scheme should be amended to provide more direction for the future development of this area. The options are:

- Rezoning to land to C1Z; or
- Updating the MSS to specifically support retail and commercial uses in the *core area* and complimentary business uses in the *secondary area*. This will provide strategic justification for future rezoning of specific properties as development is proposed.

#### AREA C – LAND ZONED MUZ WITH FRONTAGE TO THE LAKE FORESHORE AND TOWN CENTRE

This site is already zoned MUZ and are adequately sized to accommodate limited commercial and retail development (of a scale commensurate the MUZ provisions), and accommodation uses. The strategic location and interface with the lake foreshore will enable development to compliment this tourism and recreation zone.



**Figure 12: Vacant MUZ land with frontage to the lake foreshore**

The revised MSS supports and promotes mixed uses and development in this location. No further action is required for this area. The MUZ will facilitate development (either as-of-right or through a planning permit application), when the land owners are ready to develop the site.

#### 4.1.1.2 Restricted Retail (C2Z)

##### AREA V - LAND ZONED C2Z AND LOCATED ALONG THE MURRAY VALLEY HIGHWAY, ADJACENT TO THE NEW BUNNINGS DEVELOPMENT.

This site is zoned C2Z and adequately sized with a range of lot sizes to accommodate a large amount of restricted retail and bulky goods development. The land is located in a decentralised location from the town centre within a planned retail and commercial node. The newly constructed Bunnings will serve as an anchor to support further development in this location. The land has already been subdivided and is development ready.

No further action is required for this area and land development will occur based on demand, noting the extensive contribution this node makes to the zoned land supply for C2Z in Yarrawonga.

##### AREA X - LAND ZONED C2Z AND LOCATED ALONG THE MURRAY VALLEY HIGHWAY, ADJACENT TO THE NEW EMERGENCY SERVICES HUB.

This site is zoned C2Z and has not been developed or subdivided. The land is subject to the Development Plan Overlay (DPO6). The land can theoretically accommodate a large amount of restricted retail and bulky goods development. The land is located in a decentralised location from the town centre, strategically located at the western entrance to Cobram, and relatively close to the town centre and the industrial area. The development potential of this land may be reviewed in the future should other C2Z nodes show substantial development that may reduce the viable development of restricted retail in this location, or other C2Z nodes demonstrate a higher net community benefit.

No further action is required for this area and land development will occur based on demand, subject to a planning permit.

##### AREA Y - LAND LOCATED ALONG THE PROPOSED NEW MURRAY VALLEY HIGHWAY CONNECTION.

The proposed alignment for the new Murray Valley Highway connection to the Mulwala Bridge will deviate through traffic away from Belmore Street and the town centre along a new north-south alignment. The former railway precinct is bisected by the alignment. The *Moirā Shire Economic Analysis* identified the land along this alignment as an investigation area for commercial (restricted retail) development.

It is acknowledged that this new road connection will have exposure to a higher order road and land fronting this connection therefore may have development potential for retail uses. From a strategic planning perspective, allowing retail development (either conventional or restricted) in this location will likely have an impact on existing retail development, both in the town centre and developed/planned decentralised locations. The projected demand for retail floor space is already well catered for in terms of zoned C1Z and C2Z land, with over 17 Ha zoned C2Z land currently vacant in two different locations. The new connection is also separated from the existing town centre along Belmore Street by residential development, making effective integration and synergy with the town centre unlikely.

Limited retail development, such as service stations and tourism accommodation, may be viable long the route at key locations without having a substantial effect on existing zoned land and developments.

Substantial retail development is therefore not recommended in this location unless the overall C2Z zoned land supply is reviewed, or alternatively the aim is to stimulate competition by introducing additional land supply to 'bring forward' development on a first-in best-dressed basis.

##### AREA Z - THE OLD YARRAWONGA SALEYARDS SITE

The saleyards have been closed since 2013 and the site is currently under-utilised. The site is strategically located adjacent to the industrial area and potential re-aligned southern extension of the Murray Valley Highway

connection. The site is currently zoned Industrial 3 (IN3Z) and will require rezoning for retail use. The site at present does not have direct exposure to a major road.

Substantial retail development is not recommended in this location in the short term unless the overall C2Z zoned land supply is reviewed and improved road access/exposure is provided. Once the alignment of the proposed new Murray Valley Highway connector has been finalised, the suitability of this site for C2Z could be re-evaluated as part of a C2Z land review.

## 4.2 Cobram

Cobram currently has a projected per capita retail floor space allocation of 1.85m<sup>2</sup>. The projected retail floor space needs for Cobram to provide a 2.2m<sup>2</sup> ratio by 2031, with allocation made for potential leakage and tourism growth, are calculated at approximately 7,150m<sup>2</sup>.

This theoretical 2031 floor space demand estimate will require between 1.75 ha and 2 ha zoned commercial land when a coverage of 35-40% is applied to a 2.2m<sup>2</sup> ratio. Cobram currently has approximately 2 ha of C1Z and 11 ha of C2Z vacant zoned land.

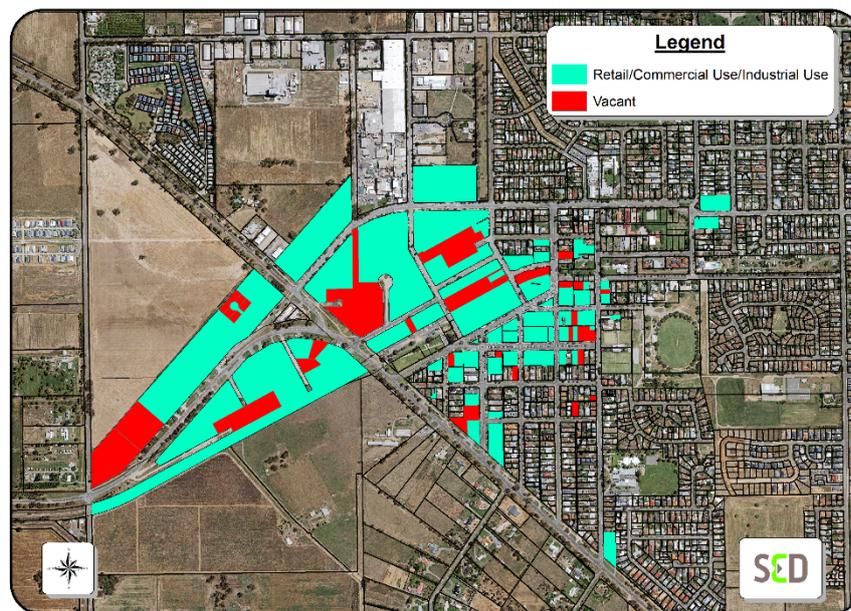


Figure 13: Vacant Zoned Commercial Land - Cobram

### 4.2.1 Key opportunities

The current spatial form of commercially zoned land in Cobram supports:

- A compact centralised town centre functioning around Punt Road, William Street, Bank Street and Main Street.
- Bulky goods (hardware) and other retail developments within a centralised C2Z area with frontage to the Murray Valley Highway and Broadway Street.
- A small retail node clustered around Mookarii Street within the C1Z.

Cobram has over 8 Ha of C1Z zoned land that is either vacant or used for residential purposes, and over 11ha of vacant zoned C2Z land. This is theoretically adequate supply to accommodate the projected current and future retail development needs of Cobram. The majority of this land is not covered by planning overlays that will inhibit

a change in land use. The zoned land supply is generally located adjacent to developed commercial land, have good road access, and will support integrated development with the existing town centre.

It is acknowledged that, given the lack of large vacant C1Z sites, redevelopment (and potentially consolidation) of existing properties will be required for larger floor plate developments such as a new full-line supermarket or DDS; this may inhibit development. Integrated development within the current C1Z zoned area is preferred to support the centralised town centre, however the lack of larger sites within the retail core may require development to be considered in close proximity to the retail core to provide the required projected retail floor space. A number of vacant parcels are located within the C2Z in close proximity to the core retail area of the town centre, which could make them highly suitable for future conventional retail development or restricted retail development; noting that these sites have varying suitability to accommodate a large restricted retail floor plate development (such as a Bunnings).

Based on current C1Z zoned land and vacant parcels in both the C1Z and C2Z, retail expansion can occur in several locations (refer map below). These locations are further investigated to inform policy direction and include:

- Current C1Z zoned land with residential development.
- Current vacant zoned land (both C1Z and C2Z).
- The proposed Cobram Business Park located along the Cobram-Koonoomoo Road.

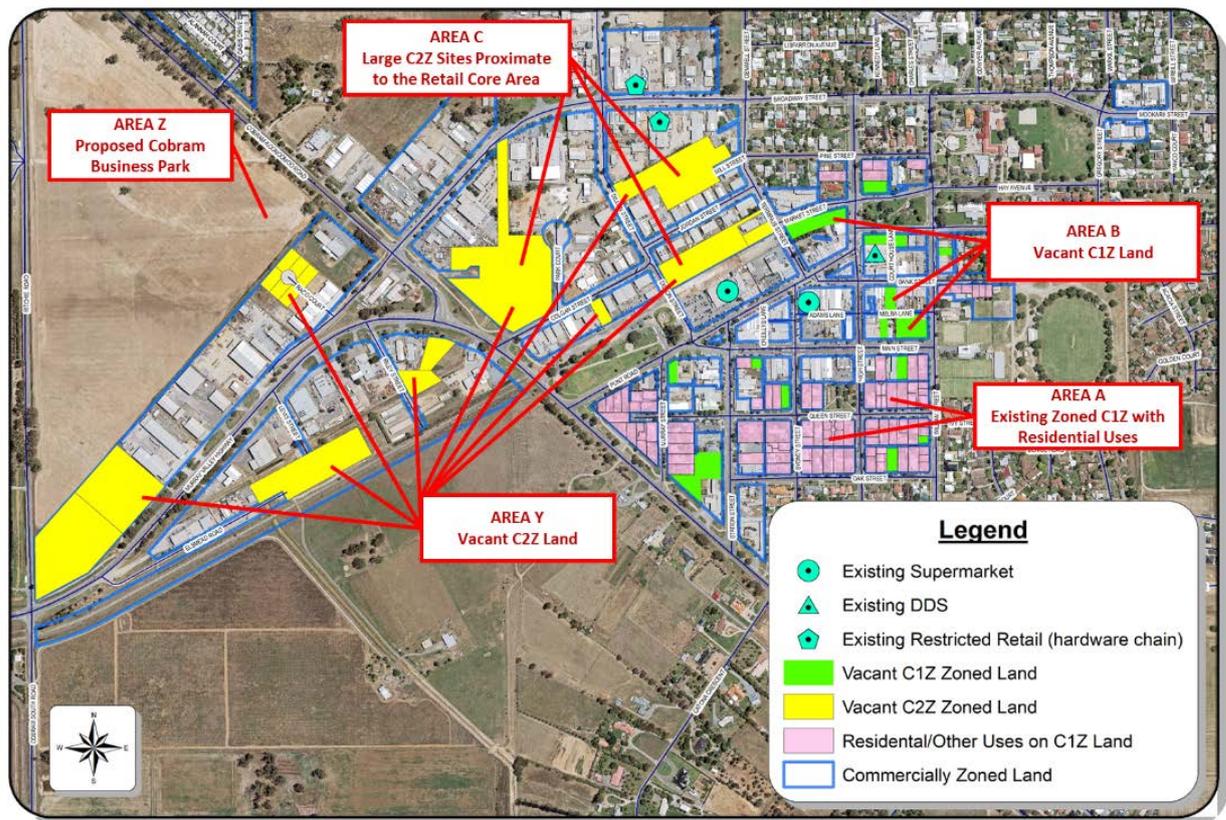


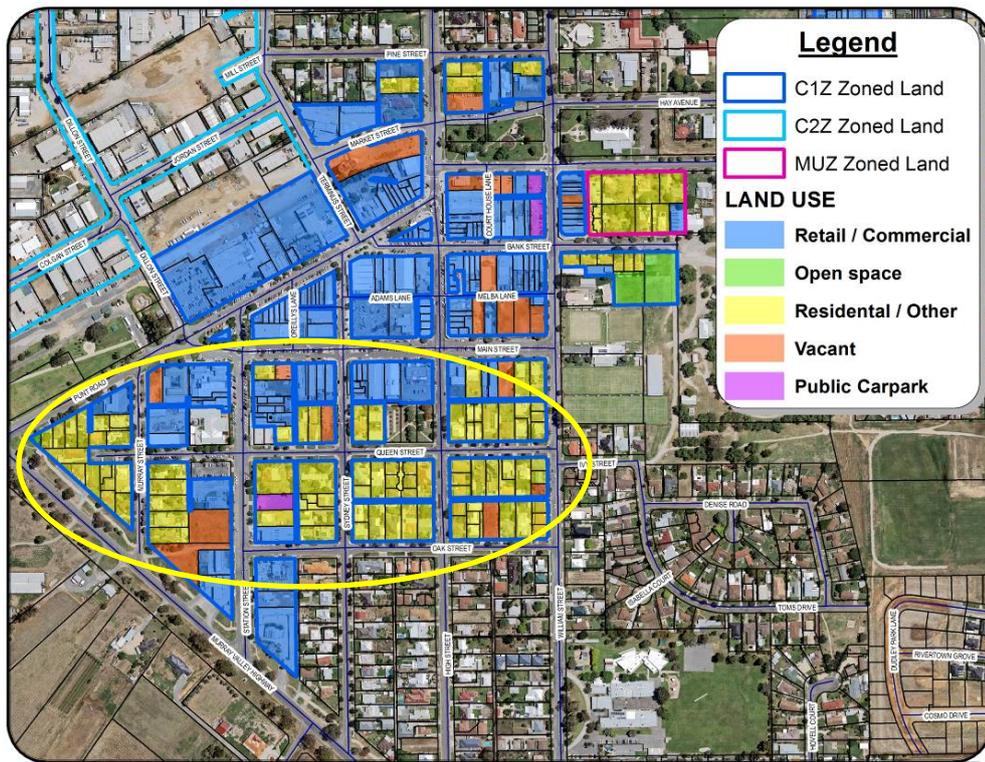
Figure 14: Potential Retail Expansion Areas - Cobram

4.2.1.1 Conventional Retail (C1Z)

**AREA A – EXISTING ZONED C1Z LAND AROUND THE TOWN CENTRE DEVELOPED AS RESIDENTIAL**

Cobram has over 6.05 Ha (30.53%) of C1Z land occupied by residential or other uses. This land is primarily fronts onto Queen Street, Oak Street and the Murray Valley Highway (refer map below).

This is considered adequate supply to accommodate the projected current and future retail development needs of Cobram. The majority of this land is not covered by planning overlays that will inhibit a change in land use. The zoned land supply is generally located adjacent to developed commercial land, have good road access, and will support integrated development with the existing town centre.



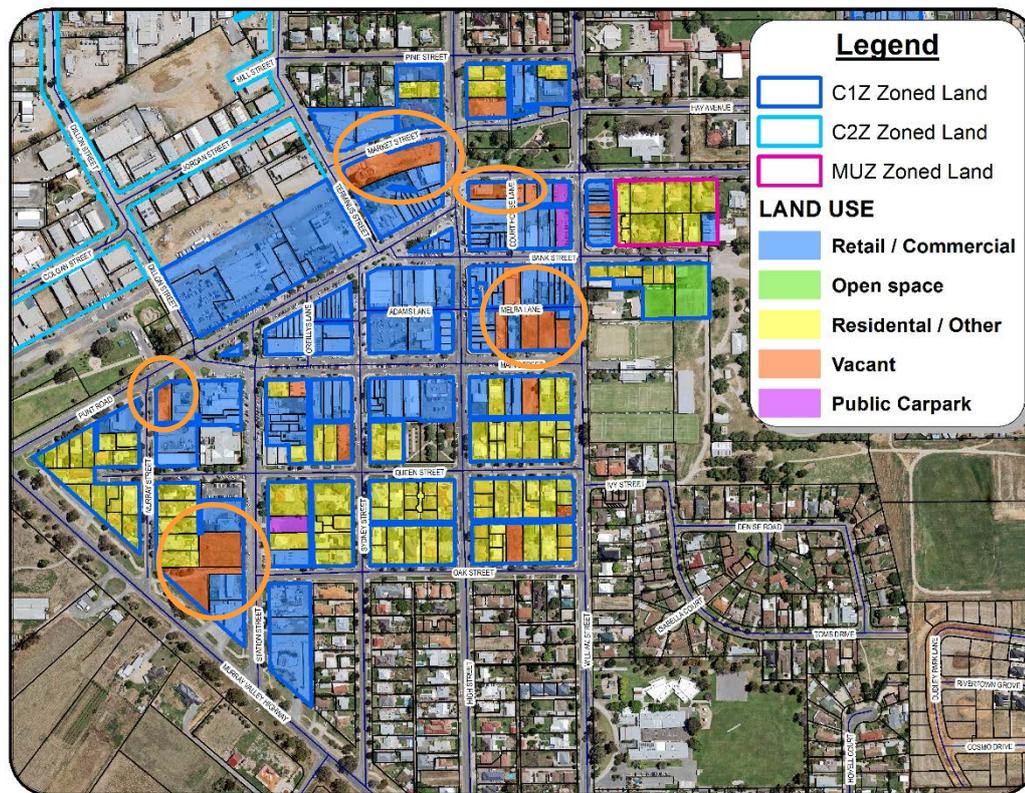
**Figure 15: C1Z Land in Cobram occupied by residential uses**

It is acknowledged that redevelopment (and potentially consolidation) of existing properties will be required for larger floor plate developments such as a new full-line supermarket or DDS; this may inhibit development. The cost and related complications of having to consolidate land will very likely discourage larger floor plate developments in this area, and smaller retail and commercial developments are most likely to develop in this area over time. Integrated development within the current C1Z zoned area is preferred to support the centralised town centre and the expansion of retail into this area should be supported. The sentiments of existing residents in this area may however be to retain the residential character of the area, irrespective of the current C1Z zoning, and the transition of land use may be slow or not occur at all. The implication is that the actual zoned C1Z land supply in the short and medium term may be overstated by the inclusion of all this land, specifically for larger floor plate developments.

No further action is required for this area given the land is already zoned C1Z, and development will occur commensurate with demand, land prices, owner sentiment and commercial development opportunities in the town centre.

**AREA B – VACANT C1Z ZONED LAND**

A number of vacant C1Z properties are located in the town centre (refer map below).



**Figure 16: Vacant C1Z Land in Cobram**

The majority of these sites will support infill and redevelopment in the retail core and the development of these sites should be encouraged to strengthen the town centre. The vacant zoned land supply is generally located adjacent to developed commercial land, have good road access, and will support integrated development with the existing town centre. Some of the vacant parcels in the retail core are affected by the Heritage Overlay, however the majority of this land is not covered by planning overlays that will inhibit their development and activation.

The size of these parcels will generally not support the development of larger floor plate development such as a full-line supermarket or DDS and associated on-site parking. These properties directly contribute to the zoned C1Z land supply in the short and medium term, specifically for small to medium floor plate developments. It should be noted that a planning permit for residential development has been approved for the vacant site located in Station Street, and this land may likely not be developed for retail or commercial purposes, but rather other permissible uses within the C1Z.

No further action is required for this area given the land is already zoned C1Z, and development will occur commensurate with demand, land prices and commercial development opportunities in the town centre.

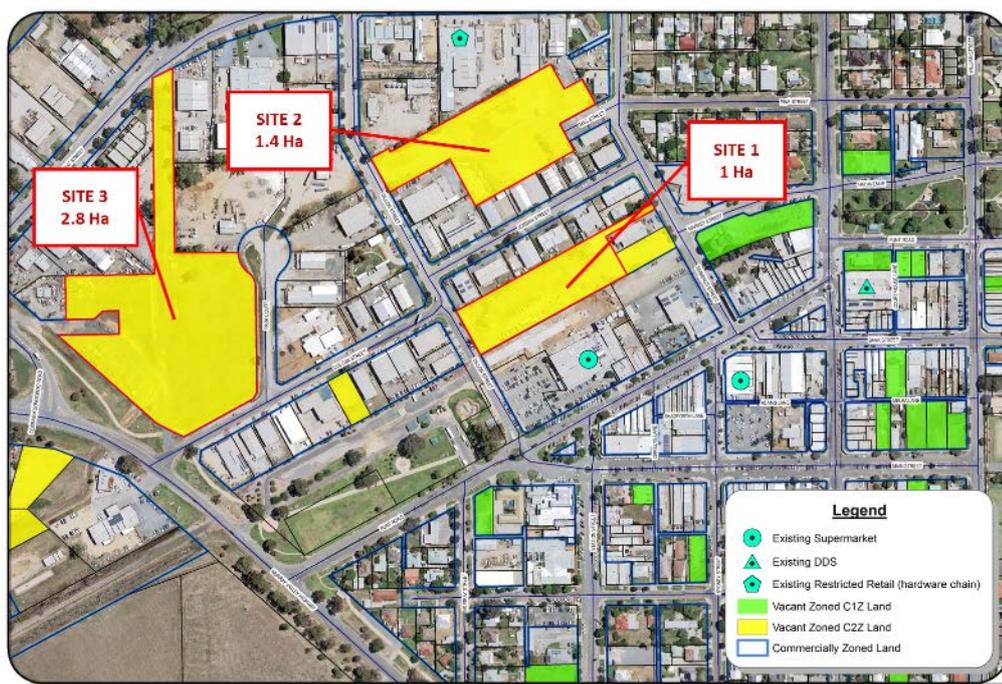
**AREA C – LARGE VACANT C2Z SITES PROXIMATE TO THE RETAIL CORE AREA**

Given the identified lack of large vacant C1Z land parcels, large vacant C2Z sites that are proximate to the retail core area of the town centre have been investigated for their suitability for a large floor plate conventional retail development (such as a full-line supermarket of 3,200-3,500m<sup>2</sup> and/or DDS). A full-line supermarket with some ancillary shops generally require a site of 0.75 Ha to 1.4 Ha with appropriate dimensions for a functional building

envelope, parking and loading facilities (depending on the scale of development). Should restricted retail uses not be proposed for these identified sites and Council supports the rezoning of one of these sites to C1Z to strategically increase land supply, this could be the mechanism to provide retail floor space growth in the town centre for a new format supermarket and/or DDS and ancillary retail. A rezoning from C2Z to C1Z will be required given the restriction on floor space for supermarkets within the C2Z provisions, requiring a supermarket to be less than 1,800m<sup>2</sup> and have frontage to a road in the Road Zone.

It should be noted that 'land banking' is not the intended outcome but rather development with demonstrated demand that increase choice and diversity.

The following three sites have been analysed:



**Figure 17: Investigation Sites for Large Floor Plate Conventional Retail in Cobram**

#### *Site 1:*

The land is approximately 1 Ha in size and have frontage to both Dillon Street and Terminus Street, with Dillon Street providing good access and exposure to the site. The site fronts directly onto the C1Z boundary and is located very close to the retail core of the town centre. The dimensions of the site is approximately 50m wide by 165m long; a supermarket (or DDS) and limited speciality shops could be designed to fit onto the site although the dimensions are likely not the width for the building envelopes usually preferred by national chains. The site is directly adjacent to a current supermarket (Woolworths).

#### *Site 2:*

The land is approximately 1.4 Ha in size and have frontage to both Dillon Street and Mill Street (the former saleyards site). The street frontages are relatively narrow and does not provide good exposure to the centre/core area of the site. The site is located approximately 185m from the from the C1Z boundary and retail core of the town centre. The dimensions of the site is approximately 40m wide by 200m long and 85m at its widest point; a supermarket with speciality shops and a small DDS could be designed to fit onto the site. The site is surrounded by a mixture of light industrial and retail developments.

*Site 3:*

The land is approximately 2.8 Ha in size and have good frontage and exposure to the Murray Valley Highway, Colgan Street, Park Court and Broadway Street. The site is located approximately 200m from the from the C1Z boundary and retail core of the town centre. The dimensions of the site is approximately 100m wide by 140m long at its shortest boundaries; a supermarket, DDS and speciality shops could be designed to fit onto the site. The site is surrounded by a mixture of retail and commercial developments.

*Summary of high level site analysis:*

Consideration	Site 1	Site 2	Site 3
Adjacent to C1Z / retail core	Yes	No	No
Proximate to C1Z / retail core	Yes	Yes	Yes
Road access	Good	Good	Good
Road frontage and exposure	Fair	Fair	Good
Ability to accommodate new format supermarket building envelope	Fair	Good	Very Good

All three sites are generally suitable for a supermarket or DDS depending on the development outcome sought, noting that building size and design is less limited on Sites 2 and 3 than Site 1.

## 4.2.1.2 Restricted Retail (C2Z)

**AREA Y – VACANT C2Z ZONED LAND**

A number of vacant C2Z sites are available totalling 11 Ha. These vacant sites are scattered across the C2Z area and range in lot size, providing for various types and scale of restricted retail development in Cobram.

The land supply is considered adequate to meet projected demand for restricted retail. Should Council support the rezoning of a larger site to C1Z to strategically increase land supply, the subsequent impact on zoned C2Z land supply should be reviewed at that time.

**AREA Z – PROPOSED COBRAM BUSINESS PARK**

Although the C2Z land supply is considered adequate to meet projected demand, there are limited sites capable of accommodating a larger floor plate development (such as Bunnings) with exposure to the highway. Should a development of this scale be required and not accommodated by utilising vacant land or redevelopment of properties in the C2Z, the proposed Cobram Business Park could be a viable alternative in the future to expand the C2Z area.

This opportunity was first identified in the *Cobram Strategy Plan 2025 (2006)* as follows:

*Subject to the outcomes of the floorspace analysis, establish a 'Business Park' to be zoned Business 4 in the triangle defined by The Murray Valley Highway, Cobram Koonoomoo Road and Ritchie Road. Apply an appropriate overlay to the site to control aspects such as built form, design, landscaping and the like.*

The MSS also encourage the establishment of the Cobram Business Park on land between the Murray Valley Highway, Cobram-Koonoomoo Road and Ritchie Road.

The findings of this analysis does not support the development of additional C2Z in the short term due to adequate zoned land supply. However, should Council wish to expand C2Z floor space and provide a development opportunity in Cobram for large scale restricted retail to reduce potential loss of expenditure to other larger centres this location, or wish to ensure adequate long term C2Z land availability integrated with existing C2Z land, a section of this land could be reserved for C2Z use. It must be noted however that:

- the additional C2Z land supply should be of scale commensurate the development need or long term land supply requirements
- there is already two national chain hardware stores in Cobram and an economic impact assessment should accompany any development application for this type of use to ensure the development will complement the town centre offer
- the design and layout of the area should integrate with the existing zoned area and not create a stand-alone development node.

## 5. Decision-making Framework for Retail Development

Generally speaking the guiding principles proposed in section 2 will direct retail use and development to existing zoned areas within Cobram and Yarrawonga. All development is strongly encouraged to locate within zoned and planned retail nodes, it is recognised that Council needs a decision-making framework to consider both exceptions and large scale developments.

The decision-making framework will assist Council to apply the guiding principles in the assessment of the merit of each application to the benefit of the retail sector and the community.

Significant developments should provide Council with a submission that address the proposals compliance with the Moira Planning Scheme and relevant Council policy, and an Economic Impact Statement outlining:

- Trade area and catchment details
- Economic impacts on existing retail within the town centre
- Net community benefit
- Response to the guiding principles for retail development.

## 6. Recommendations

### 6.1 General

- Adopt a vision and set of guiding principles for retail development in Cobram and Yarrawonga.
- Utilise strategic retail floor space targets to guide retail policy directives for both Cobram and Yarrawonga.
- Implement a decision-making framework for the assessment of the merit of each application to the benefit of the retail sector and the community.
- Amend the Moira Planning Scheme by:
  - Incorporating the vision and guiding principles for retail development in Cobram and Yarrawonga in *Clause 21.06 Economic Development*
  - Updating *Clause 21.07 Local Areas* to reflect the specific land use directives for Cobram and Yarrawonga.

### 6.2 Cobram

- Adopt the strategic per capita retail floor space allocation of 2.2m<sup>2</sup> for Cobram to guide retail floor space provision and development.
- Discourage retail development outside zoned C1Z and C2Z areas.
- Facilitate the expansion and diversification of retail use and development to improve choice, range and diversity of offer consistent with existing demand, guided by the adopted decision-making framework for retail development.
- Encourage the use of vacant sites and the re-development of existing sites in the C1Z area for retail uses to support the compact town centre structure.
- Seek the relocation of inappropriate, non-core uses in the town centre to more suitable and appropriately zoned sites to intensify retail and commercial uses.
- Consider the conversion of a suitable strategically located vacant C2Z site to C1Z that can accommodate a large floor plate conventional retail development to support retail floor space supply and diversity in the town centre, and encourage development proposals that conform to the guiding principles and comply to the requirements of the decision-making framework for retail development.
- Encourage longer trading hours for retail premises to support tourism and town centre activation.
- Earmark the land directly north of the existing C2Z and west of the Cobram-Koonoomoo Road (referred to as the Cobram Business Park) as a medium to long term C2Z expansion area.

### 6.3 Yarrawonga

- Adopt the strategic per capita retail floor space allocation of 2.4m<sup>2</sup> for Yarrawonga to guide retail floor space provision and development.
- Discourage retail development outside town centre and planned retail nodes zoned C1Z and C2Z.
- Promote development in the MUZ that support integration of tourism, retailing, residential uses and the activation of the lake foreshore.

- Extend (or indicate in-principle support for the extension of) the C1Z to the northern boundary of the Murray Valley Highway for land with frontage to Belmore Street and ensure appropriate urban design outcomes with residential interface areas.
- Facilitate the expansion and diversification of retail use and development to improve choice, range and diversity of offer consistent with existing demand, guided by the adopted decision-making framework for retail development.
- Seek the relocation of inappropriate, non-core uses in the town centre to more suitable and appropriately zoned sites to intensify retail and commercial uses and the redevelopment of underutilised sites.
- Encourage longer trading hours for retail premises to support tourism and town centre activation.
- Review the C2Z zoned land supply and development opportunities in the medium term to ensure net community benefit from future development sites.

## Reference Documents

Retail Policy Framework for Cobram and Yarrawonga: Background Analysis Report

Moira Planning Scheme

Planning Scheme Amendment C77



SED