



TALLOWOOD & HART

Location Report · 186 Church Street

186 Church Street · 5 and 10 min by car

14 Oct 2026

Contents

01	Location and catchment	2
02	Who lives there	4
03	Spending power	7
04	Competition	9
05	The sector market	13
06	Neighbouring categories	14
07	Estimate	15
08	Property	17
09	Conclusions	18
10	Sources and method	20

WHERE

Location and catchment

The site and the area its customers come from, within a 10-minute drive of 186 Church Street.

272,556 people live within a 10-minute drive of 186 Church Street; 21.4% of them in the first band, 0–5 min.

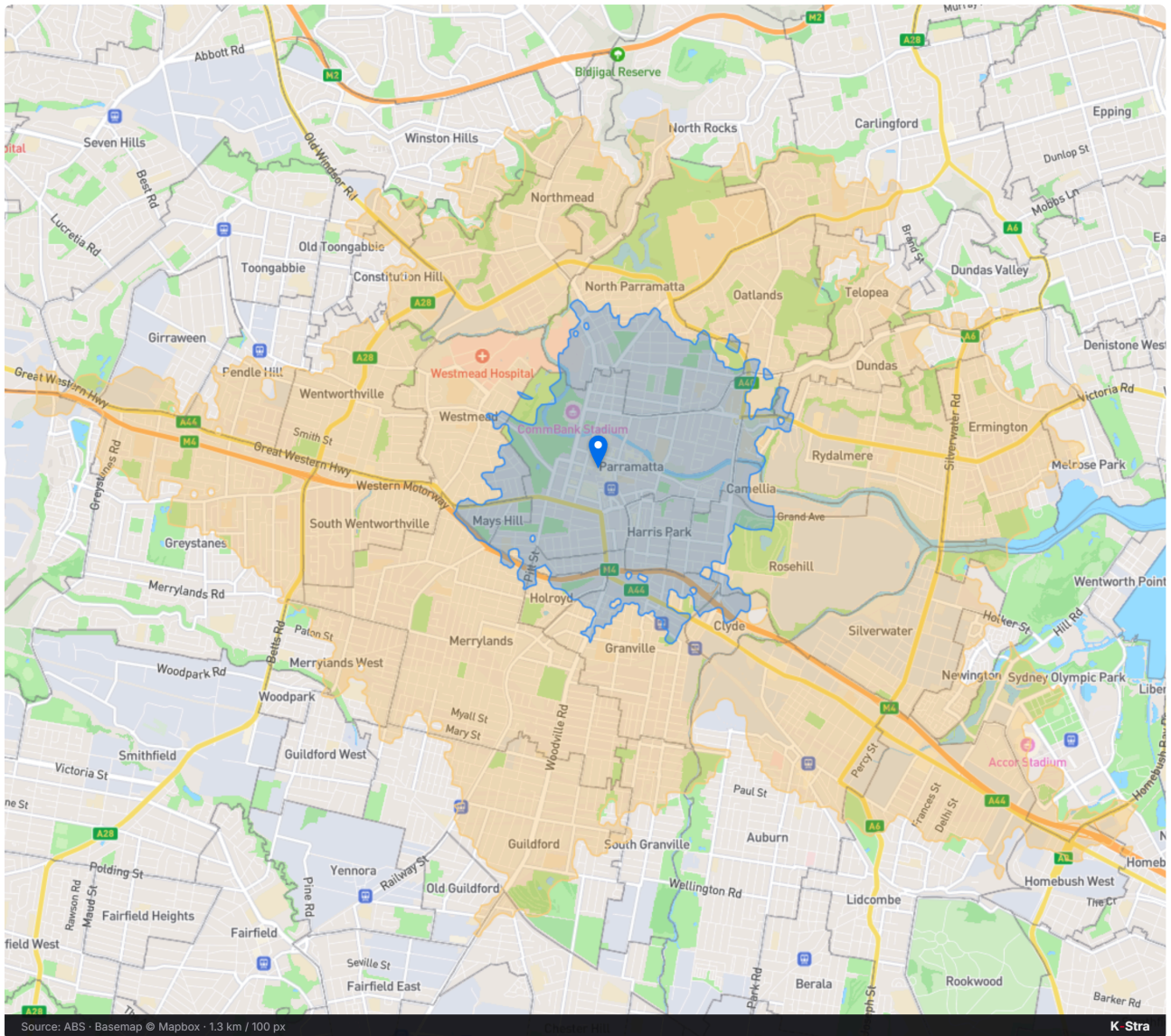
Residents by band 2024 · ABS

Band	Pop	Pop (%)	Dwellings	Area (km²)
0–5 min	58,279	21.4	23,897	10.65
5–10 min	214,277	78.6	71,750	63.77
Catchment	272,556	100	95,647	74.42

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra

Data as of 14 Oct 2026

Catchment



Travel-time bands

Residents in each band

● 5 min	58,279
● 10 min	214,277

Data as of 14 Oct 2026

Who lives there

The residents of the catchment next to the suburb, the local government area, the state and Australia.

The catchment has a younger, more working-age population than Australia, with 71.3% aged 15–64 versus 65.1% nationally, though the consumption index is 96.5 compared to the national 100.

Compared with the areas around 2024 · ABS

Indicator	Catchment	Parramatta	Parramatta LGA	New South Wales	Australia
Population	272,556	32,471	274,956	8,479,314	27,194,369
Area (km²)	74.4	5.2	83.8	800,797.7	7,688,095
Population density (per km²)	3,662.4	6,203.3	3,279.9	10.6	3.5
Population change, avg yearly (%)	1.19	1.36	1.36	1.08	1.47
Families	62,937	7,667	69,127	2,135,968	6,730,182
Residents per family	4.33	4.24	3.98	3.97	4.04
Males (%)	52	53	50.6	49.7	49.6
Females (%)	48	47	49.4	50.3	50.4
Born overseas (%)	51	64.8	49.8	27.9	25.9
Average age (years)	36.1	33.6	37.5	39.9	39.8
Old-age index	65	45.2	76	100.7	98.1
Participation rate (%)	42.7	53.4	47.5	45.7	46.6
Not in labour force (%)	57.3	46.6	52.5	54.3	53.4
Unemployment rate (%)	7.4	7.3	5.7	4.9	5.1
Income index (NIR)	96.2	108.3	104.6	101	100
Consumption index (NIC)	96.5	107.8	104.3	100.9	100

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra Area: the surface of the catchment as drawn on the map. Population change: the average yearly change over the last eight years; for the catchment and the suburb, that of their LGAs, weighted by their residents. Old-age index: people aged 65 and over for every 100 aged 0-14. Compared with the suburb, local government area and state where the location is, and Australia.

Data as of 14 Oct 2026

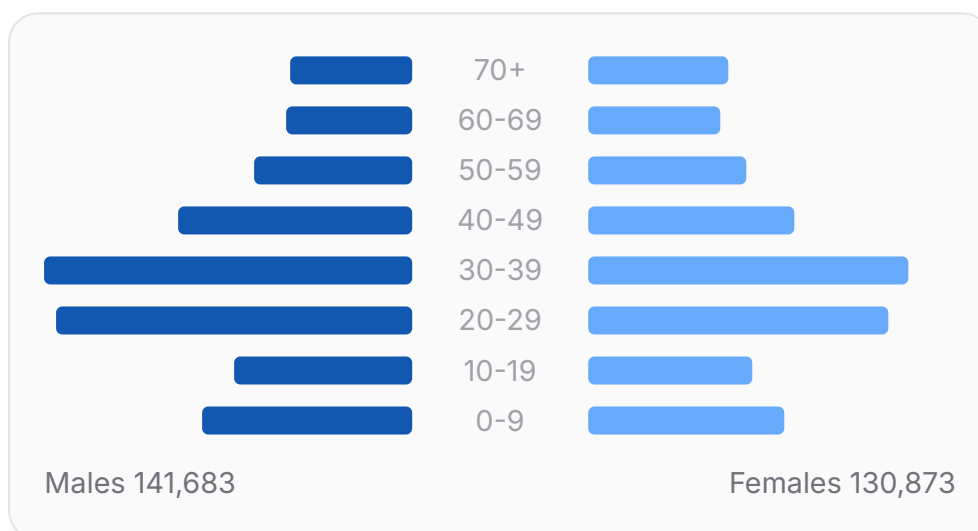
Age groups 2024 · ABS

Age group	Share of residents (%)	Parramatta (%)	Parramatta LGA (%)	New South Wales (%)	Australia (%)
Under 5 (0-4)	6.2	6.3	5.4	5.6	5.5
Children (0-14)	17.4	14.4	16.7	17.6	17.6
Working age (15-64)	71.3	79.1	70.5	64.7	65.1
65 and over	11.3	6.5	12.7	17.7	17.3
70 and over	7.8	4.3	8.9	12.6	12.3

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra Groups overlap (0-4 is inside 0-14), so they do not add up. Compared with the suburb, local government area and state where the location is, and Australia.

Data as of 14 Oct 2026

Age and sex



Age and sex of the catchment: males left, females right (8 cohorts).

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra Compared with the suburb, local government area and state where the location is, and Australia. Shares (%) are of all residents.

Data as of 14 Oct 2026

Education 2024 · ABS

Education	Catchment (%)	Parramatta (%)	Parramatta LGA (%)	New South Wales (%)	Australia (%)
No qualification	2	0.7	0.8	1	0.8
Secondary	13.2	5.4	9.9	23	21.1
Upper secondary	56.1	56.2	56.5	52.3	55.3
Degree	28.7	37.7	32.8	23.8	22.7

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra Compared with the suburb, local government area and state where the location is, and Australia. Shares (%) are of the residents counted in the four levels.

Data as of 14 Oct 2026

Employment 2024 · ABS

Rate	Total	Parramatta	Parramatta LGA	New South Wales	Australia
Participation rate (% of residents)	42.7	53.4	47.5	45.7	46.6
Employment rate (% of labour force)	92.6	92.7	94.3	95.1	94.9
Unemployment rate (% of labour force)	7.4	7.3	5.7	4.9	5.1
Employed per 100 residents	39.5	49.5	44.7	43.4	44.3

Source: ABS — population, sex and age 2024 (annual estimates); the other figures Census 2021, shared out over the addresses so that each LGA keeps its official total · K-Stra Compared with the suburb, local government area and state where the location is, and Australia.

Data as of 14 Oct 2026

Spending power

Income and consumption indices of the residents, with Australia = 100.

Per capita consumption is A\$50,717 a year, below Australia's A\$52,583 a year, yet residents generate A\$1,352M a year in total household spending on food and non-alcoholic beverages (a minimum, excluding Parramatta workers and visitors).

Wealth indices 2023 · ABS

Indicator	Catchment	Australia	Difference
Income index (NIR)	96.2	100	-3.8
Consumption index (NIC)	96.5	100	-3.5
Consumption per capita (AUD/year)	50,717	52,583	-1,865

Source: income index from ABS Personal Income 2023 (tax data) where measured, a K-Stra estimate elsewhere; Australia = 100 · K-Stra
Data as of 14 Oct 2026

Spending by category 2025 · ABS

Category	Per capita (A\$/year)	Total (A\$ M/year)	Share (%)
Food and non-alcoholic beverages	4,961	1,352	9.8
Alcoholic beverages, tobacco and narcotics	1,480	403.4	2.9
Clothing and footwear	1,835	500.1	3.6
Housing, water, electricity, gas and other fuels	12,420	3,385.1	24.5
Furnishings, household equipment and routine household maintenance	2,124	578.9	4.2
Health	3,670	1,000.3	7.2
Transport	5,354	1,459.3	10.6
Information and communication	924	252	1.8
Recreation, sport and culture	5,121	1,395.7	10.1
Education services	1,747	476.3	3.4
Restaurants and accommodation services	4,212	1,148.1	8.3

Spending by category (continued)

Category	Per capita (A\$/year)	Total (A\$ M/year)	Share (%)
Insurance and financial services	3,990	1,087.6	7.9
Personal care, social protection and miscellaneous goods and services	2,879	784.8	5.7
Total consumption	50,717	13,823.3	100

Source: ABS national accounts 2025: the average spending per resident on each category, raised or lowered by the area's consumption index · K-Stra

Data as of 14 Oct 2026

Where the spending goes



Where the spending goes: share by category (13 categories).

Source: ABS national accounts 2025: the average spending per resident on each category, raised or lowered by the area's consumption index · K-Stra

Data as of 14 Oct 2026

Competition

The supermarkets of the catchment: how many for every 10,000 residents next to the local government area, the state and Australia, and the nearest ones with their minutes by road from the site.

Supermarket supply in the catchment is above state and national levels at 4.84 stores per 10,000 residents (132 stores total), compared to 2.97 in New South Wales and 3.01 across Australia.

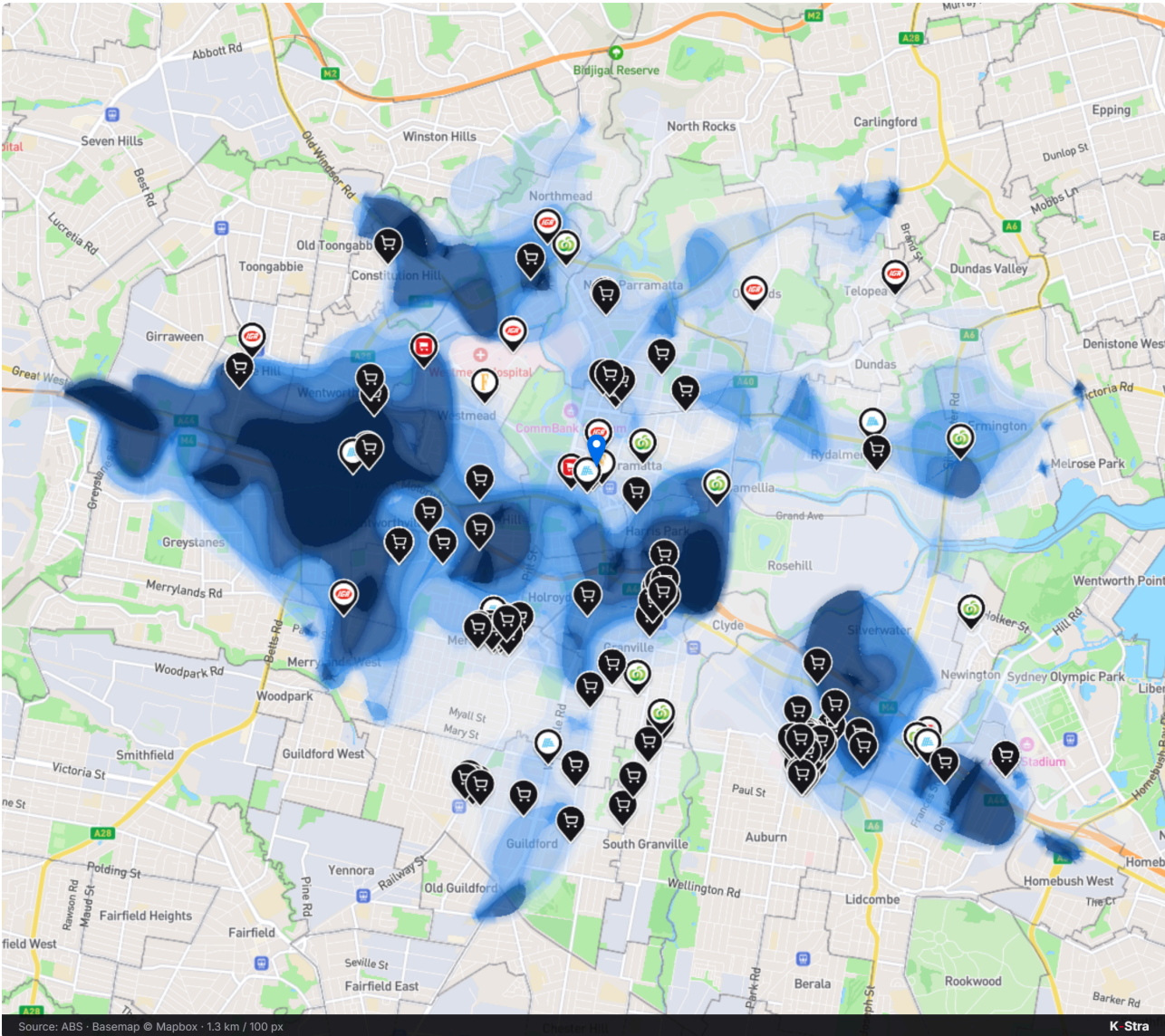
Stores for every 10,000 residents

Area	Stores	Residents	Per 10,000 residents
Catchment	132	272,556	4.84
Parramatta LGA	70	274,956	2.55
New South Wales	2,516	8,479,314	2.97
Australia	8,181	27,194,369	3.01

Source: K-Stra gravity model · ABS spending 2025 and population 2024 · third-party places data 2026 — stores counted where they stand; the local government area and the state are those where most of the residents live

Data as of 14 Oct 2026

Supermarkets · competition



Opportunity

Supermarkets · 10 shades



Data as of 14 Oct 2026

Competitors

 Stores of the sector

132

The nearest stores

Store	Address	Time (min)	Rating	Reviews
Romeo's IGA Food Hall Parramatta	37/39 George St, Parramatta NSW 2150	1.4	3.5	119
Woolworths Metro George St Parramatta	Shop 4/180 George St, Parramatta NSW 2150	1.6	4.3	142
X Grocer Parramatta	Westfield Shopping Centre, 159-175 Church St, Parramatta NSW 2150	2	3.3	141
Woolworths Parramatta	159-175 Church St, Parramatta NSW 2150	2.1	4.1	2,711
Pathan Supermarket	Unit 3/96-98 Wigram St, Harris Park NSW 2150	2.5	4.6	111
Coles Parramatta North	20 Victoria Rd (Cnr, Parramatta Entrada, Church St, Parramatta NSW 2150	2.6	4	1,687
Coles Parramatta	Campbell St, Parramatta NSW 2150	2.9	3.9	1,537
Hyperstar Market	32/34 Ross St, North Parramatta NSW 2151	2.9	4.6	129
Star Grocery	397 Church St, Parramatta NSW 2150	2.9	3.5	111
ALDI	175 Church St, Parramatta NSW 2150	3	3.5	62
Seng Seng Mart	Suite 6, 21-23 Grose St & 4, Villiers St, Parramatta NSW 2150	3.1	4.5	164
SPAR Supermarket North Parramatta	51-53 Albert St, North Parramatta NSW 2151	3.7	4.3	326
Groceries & Spices - COI	95 Victoria Rd, Parramatta NSW 2150	4	3.8	450
Woolworths Rosehill	26 Oak St, Rosehill NSW 2142	4.2	4	1,904
Tresbien Fresh Nuts And Coffee	113 Good St, Granville NSW 2142	4.5	3.9	38
North Parramatta Supermarket	9 Iron St, North Parramatta NSW 2151	4.9	4.1	28
Hiva Supermarket	21 Iron St, North Parramatta NSW 2151	5	4.8	46
Dharan Bazaar	39 Good St, Granville NSW 2142	5	4.4	31

The nearest stores (continued)

Store	Address	Time (min)	Rating	Reviews
Moonlight Bazaar Granville	21 Good St, Granville NSW 2142	5.1	3.2	85
Thai Pantry Parking	107 Parramatta Rd, Granville NSW 2142	5.2	—	—

Source: K-Stra gravity model · ABS spending 2025 and population 2024 · third-party places data 2026 — ordered by the weight the model gives each store, then by reviews. Time: minutes from the starting point along the road network

Data as of 14 Oct 2026

The sector market

Demand, competition and opportunity from the K-Stra gravity model, the best addresses for a new store and the commercial properties on the market near them.

Resident demand for supermarkets in the catchment is A\$564.07M (a minimum, as city centre workers and visitors are excluded), with A\$26.52M in opportunity open to competition across the area.

Market summary

Measure	Value (A\$ M)
Opportunity	26.52
Demand	564.07

Source: K-Stra gravity model · ABS spending 2025 and population 2024 · third-party places data 2026

Data as of 14 Oct 2026

Best addresses by opportunity

#	Address	Site	Opportunity (A\$)
1	near 179 Station Street, Wentworthville NSW 2145	Vacant land · area 18% built · largest nearby 2,435 m2	7,436,595
2	near 122 James Ruse Drive, Rosehill NSW 2142	Vacant land · area 6% built · largest nearby 2,378 m2	7,091,537
3	near 585 Great Western Highway, Greystanes NSW 2145	Vacant land · area 9% built · largest nearby 7,369 m2	6,844,829
4	near 118 Adderton Road, Carlingford NSW 2118	Vacant land · area 12% built · largest nearby 2,402 m2	6,770,079
5	near 10 Coleman Street, South Wentworthville NSW 2145	Vacant land · area 7% built · largest nearby 2,819 m2	6,579,223

Source: K-Stra gravity model · ABS spending 2025 and population 2024 · third-party places data 2026 — locations at least 500 m apart

Data as of 14 Oct 2026

Properties on the market near the best addresses

No commercial property for lease or sale was seen on realcommercial.com.au in the last 60 days within 500 m of the best locations by opportunity. This does not mean there is none: ask local agencies

Data as of 14 Oct 2026

Neighbouring categories

The businesses that share the customers of supermarkets: how many there are in the catchment, and how many for every 10,000 residents next to the local government area, the state and Australia.

Surrounding retail density is 30.75 stores per 10,000 residents, below the 33.48 national average, though minimarkets and convenience stores are above average at 4.15 per 10,000 residents versus 2.41 across Australia.

Neighbouring categories

Category	0-5 min	5-10 min	Stores	Per 10,000 residents	Parramatta LGA	New South Wales	Australia
Discount stores	1	7	8	0.29	0.15	0.27	0.35
Hypermarkets	0	0	0	0	0.04	0.01	0.01
Minimarkets & convenience stores	37	76	113	4.15	2.98	2.36	2.41
Cash & carry and wholesale clubs	4	34	38	1.39	0.87	1.45	1.44
Pharmacies	15	63	78	2.86	2.36	2.67	2.68
Bars & cafés	118	172	290	10.64	10.4	12.51	12.13
Fast food	32	87	119	4.37	2.95	3.48	3.62
Take-away	4	25	29	1.06	0.76	1.5	1.69
Fuel stations	6	51	57	2.09	1.35	3.45	3.77
Postal services	4	20	24	0.88	0.76	1.67	1.9
Bank branches	21	25	46	1.69	1.24	1.63	1.6
Shopping centers	7	29	36	1.32	1.16	1.69	1.88
All categories	249	589	838	30.75	25.02	32.7	33.48

Source: third-party places data 2026 · ABS · K-Stra — stores counted where they stand; per 10,000 residents of the territory and of the areas around it; the local government area and the state are those where most of the residents live

Data as of 14 Oct 2026

Estimate

How much of the residents' spending on supermarkets a new store at 186 Church Street would capture from the stores already there, and from which suburbs.

A new supermarket at this address is estimated to capture A\$3.5M a year in resident spending (ranging from A\$1.66M to A\$7.35M a year), a minimum given uncounted Parramatta workers and visitors.

Spend a new store would capture

Measure	Low	Central	High
Spend captured (AUD m/yr)	1.66	3.5	7.35
Share of the residents' spend within reach (%)	0.3	0.6	1.3

Low, central and high: a new store as attractive as the weakest quarter, a typical one and the strongest quarter of the 8,189 stores of the sector. It is the yearly spending of the residents of the catchment that the store would take from the stores already there (K-Stra gravity model of the sector), not its turnover: visitors and people who work in the area are not counted, so in city centres and tourist areas it is a minimum. No own stores given: nothing is taken from them, the net new spend equals the spend captured. Source: ABS population 2024, third-party places data 2026 · K-Stra

Data as of 14 Oct 2026

Assumptions. The estimate is the yearly spending of the residents of the catchment that a new store would take from the supermarkets already there (K-Stra gravity model of the sector), not its turnover. Low and high: a new store as attractive as the weakest and the strongest quarter of the supermarkets today. Visitors and people who work in the area are not counted: in city centres and tourist areas it is a minimum.

Where the spend comes from

Suburb	Captured (A\$ M/yr)	Share of the capture (%)
Parramatta	0.7	19.9
Merrylands	0.33	9.3
Westmead	0.26	7.3
North Parramatta	0.25	7.2
Wentworthville	0.16	4.7
Granville (NSW)	0.16	4.7
Northmead	0.16	4.6
Greystanes	0.13	3.8
Guildford (NSW)	0.13	3.6

Where the spend comes from (continued)

Suburb	Captured (A\$ M/yr)	Share of the capture (%)
Ermington	0.12	3.3
35 other suburbs	1.11	31.6
Total	3.5	100

The spend each site would capture (central estimate), by the suburb where the residents live: the suburbs that give the most first, the others together. Source: ABS population 2024, third-party places data 2026 · K-Stra

Data as of 14 Oct 2026

Property

Asking prices and rents of the listings in the catchment.

Values by postcode

Postcode	Median price	Per sqm	Listings
2115	1,850,000	9,028	95
2116	1,475,000	7,003	76
2117	1,600,000	5,438	118
2118	659,000	5,461	46
2127	1,600,000	6,195	14
2128	1,000,000	5,679	50
2140	599,950	4,077	10
2141	780,000	6,928	208
2142	580,000	5,384	291
2144	585,000	5,864	195
Median	671,000	5,595	3,360

Values are medians of the listings active in the period, not of sales. Yield: a year of rent as a share of the median price. Listings: the ads counted, leaving out those with implausible figures. Source: portal listings Q3 2026 – Q3 2026. Rows with an orange dot rest on fewer than 10 listings: read them as indicative. 14 listings with an implausible price or floor area are left out of the figures.

Data as of 14 Oct 2026

Price trend

Period	Price per sqm	Median price	Rent	Listing count
Q3 2026	5,595	671,000	700	3,360

Data as of 14 Oct 2026

What it means

A 10-minute drive around 186 Church Street holds 272,556 residents generating A\$564.07M in yearly supermarket demand, a minimum as city centre workers and visitors are not counted. Competition is above the 3.01 national average at 4.84 supermarkets per 10,000 residents. A typical new supermarket at this site is estimated to capture A\$3.5M a year from residents.

Strengths

- The 10-minute catchment contains 272,556 residents, with 58,279 living within the 0–5 minute drive band.
- Working-age residents aged 15–64 make up 71.3% of the catchment, above the 65.1% national average.
- Total household spending on food and non-alcoholic beverages reaches A\$1,352M a year across all retail channels.
- The suburb of Parramatta alone has a consumption index of 107.8, above the national 100, and contributes A\$0.695M a year to the estimated store capture.

Risks

- Catchment supermarket supply is 4.84 stores per 10,000 residents (132 stores), above the New South Wales average of 2.97 and the national 3.01.
- Three major supermarkets operate within a 3-minute drive: Woolworths Parramatta (2.1 minutes), Coles Parramatta North (2.6 minutes), and Coles Parramatta (2.9 minutes).
- The catchment consumption index is 96.5, below the national base of 100, with per capita consumption at A\$50,717 a year versus A\$52,583 nationally.
- Minimarkets and convenience stores are also above the 2.41 national average at 4.15 per 10,000 residents.

To check on site

- Measure pedestrian footfall and commuter flows along Church Street, as non-resident workers and visitors are excluded from the spending figures.
- Inspect loading dock access, delivery vehicle turning circles, and customer parking availability at 186 Church Street.
- Verify the floor plate configuration and zoning at 186 Church Street to confirm what supermarket format the premises can accommodate.
- Visit the nearby competitors within 3 minutes to assess their format, pricing, and customer queues.

Opening a supermarket at 186 Church Street places the store in a dense urban catchment of 3,662.4 residents per km², but directly alongside established major chains within a 2.1 to 2.9 minute drive. Out of the A\$26.52M in catchment opportunity open to competition, a typical store at this address is estimated to capture A\$3.5M a year from residents (ranging from A\$1.66M to A\$7.35M).

Because the model counts only resident spending, the A\$3.5M central estimate is a baseline in a centre like Parramatta. Viability for a new entrant here will depend on the floor space, rent, and how much additional trade can be drawn from daily workers and visitors on Church Street.

Glossary and notes

Travel-time bands: The areas that can be reached from a place within a given number of minutes (or kilometres) along the roads, by car, on foot or by bike: one band for each time or distance chosen.

Catchment: The people and the spending a store or a place can reach: everyone who lives within its travel-time bands.

Population: Residents from the official population estimate, spread over every address and added up inside each area: the figure of an area is the sum of its addresses.

Demand: The yearly spending in the sector that can be reached from a place within its catchment. It describes the catchment, not the people living at that address: catchments overlap, so the demand of different places does not add up. It is the part of the residents' spending that goes to the sector's stores, so it is smaller than their spending on the whole category of goods (Spending by category).

Supply: How much pull the existing stores of the sector already exert on a place. It is an index, not a share: 0 means that no store reaches it.

Opportunity: The part of the spending that a new opening could take from the stores already there. From one place, it is what an opening there could capture of the spending it reaches; added up over a catchment, it is the spending still open to competition, what new openings close to every resident could take: much more than one store captures (that is the Estimate).

Estimate: What one new store at the site would capture in a year of the residents' spending in its catchment, from the gravity model of the sector: low, central and high for a store as attractive as the weakest quarter, a typical one and the strongest quarter of the stores of the sector. Spending, not turnover: visitors and workers are not counted, so in city centres it is a minimum.

Gravity model: Each store attracts spending in proportion to its pull and less the farther away it is: a new opening captures the share its own pull represents against the pull of every store within reach.

Spending by category: What the residents spend in a year on a kind of goods or services, from the national accounts categories, wherever they buy it: shops of every kind, online, travelling. The demand of a sector is the part of it that goes to that sector's stores, so it is smaller.

Consumption per capita: The average yearly spending of one resident on that product or sector.

Per 10,000 residents: How many stores there are for every 10,000 residents: a density, to compare areas of different size.

Per km²: The figure divided by the surface of the area in square kilometres.

Income and consumption indices: How the income and the spending of the residents compare with the national average, set at 100: 120 means 20% above it, 80 means 20% below.

Listings: Properties advertised for sale or for rent, collected every month from public listings. Prices are the ones in the listing.

Price per sqm: The price divided by the floor area of the property, in square metres.

Dynamic: The figures are worked out again with the latest data every time the report is issued.

Sources

- Residents by band: ABS, 2024
- Compared with the areas around: ABS, 2024
- Age groups: ABS, 2024
- Education: ABS, 2024
- Employment: ABS, 2024
- Wealth indices: ABS, 2023
- Spending by category: ABS, 2025

Thank you

Tallowood & Hart