SITE SELECTION REPORT

23 SERANGOON CENTRAL NEX SINGAPORE 556083

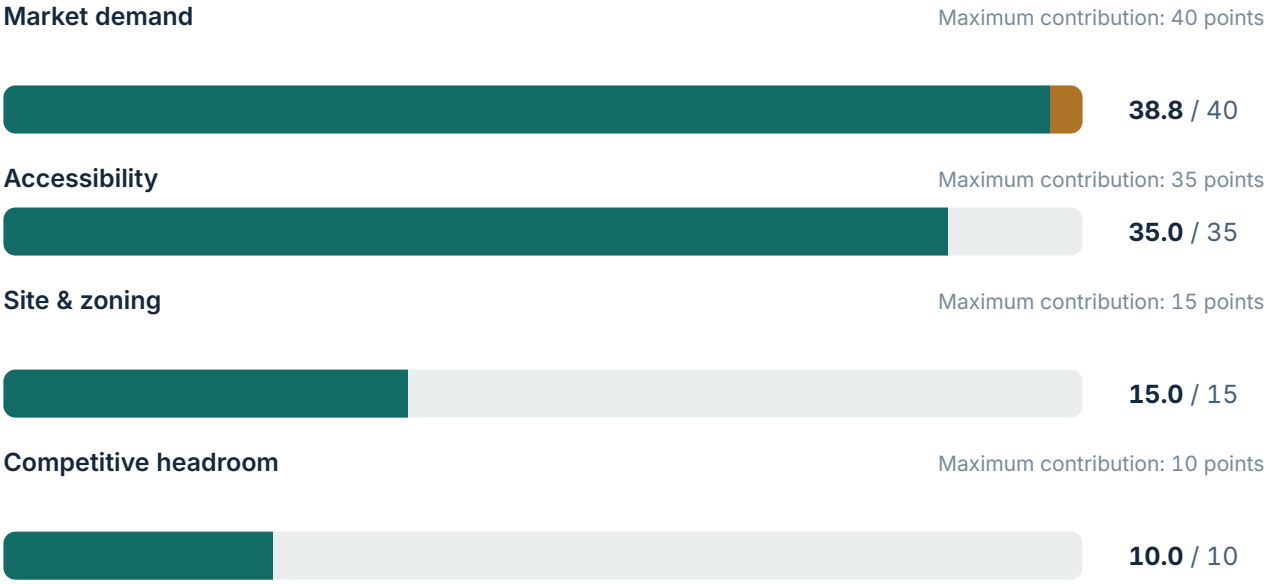
23 SERANGOON CENTRAL NEX SINGAPORE 556083

SERANGOON CENTRAL · best-fit concept: Community Supermarket (2 evaluated) · data coverage: High — 18 of 18 signals computed · generated 2026-09-06

Executive overview

98.8 /100 **Strong fit**

Community Supermarket



Every track shares one 0-40-point axis, so bar length is directly comparable across categories -- a smaller-maximum category always draws a shorter track. Teal = points earned, amber = headroom left, red = no points earned, grey = not assessed for this profile.

Strong fit

Showing the best-fit concept for this site (Community Supermarket) out of 2 supermarket formats evaluated — no concept was pre-selected.

Strong fit for a community supermarket. Resident Population Density is the strongest driver.

NEX Serangoon is a strong-fit community supermarket site because dense resident rings and exceptional transit access combine to support a frequent, mixed-basket grocery mission; the principal condition is whether the store can differentiate against the 9 existing direct supermarkets already inside the mall.

The primary demand mechanism the data supports is resident-driven grocery replenishment, with strong resident population density and full-fit zoning suitability as the core signals; exceptional transit connectivity is a likely secondary fill-in convenience. The data does not support a destination-visitor or student-driven pattern because no such signal is present.

Concept differentiation: Community Supermarket outranks Premium Supermarket by 1.7 points, a gap too small to be commercially decisive; both formats rely on the same dense residential and transit base, so the site is format-flexible.

WHY IT COULD WORK

- Resident population density and transit connectivity are both strong signals, combining a dense nearby household base with high interchange exposure; this supports a community supermarket's repeated small/medium-basket mission rather than a one-off destination trip.
- Zoning suitability and car access both fit the concept profile, which reduces two common operational frictions: permission risk and customer vehicle access; the data does not, however, measure actual loading docks or parking capacity on site.

WHAT COULD PREVENT IT

- Moderate supermarket-category pressure: Google detects 9 nearby supermarket-category businesses within the measured radius; among the 9 named results, 9 directly comparable.
- Catchment affluence is at the 76.7 percentile but contributes only a small point share; this suggests the model is not betting on an affluent premium spend, and if the dense resident base shops elsewhere or trades down on basket size, the high match score would not guarantee performance.

Next action: Shortlist this site — proceed to a site visit and lease/rent diligence.

Decision insights are generated automatically from the report's measured signals and model rules. They are not individually reviewed by a human consultant.

Data coverage — how many of the engine's signals could be computed for this site — is a measure of data completeness, not a judgement on whether to proceed.

PRIMARY CATCHMENT MODELLED

17,370 residents

Density ~79th pct of 269 commercial peers · population signal 77.3/100 among all subzones

within 500m · modelled

TRANSIT

Exceptional score

15 bus stops within 400m · SERANGOON INTERCHANGE · 32m

COMPETITIVE PRESSURE LIVE

Moderate score

9 supermarket-category listings within 300m

competition score 40 / 100 · live

SITE & ZONING

Moderately suitable score

WHITE

zoning score 52.7 / 100

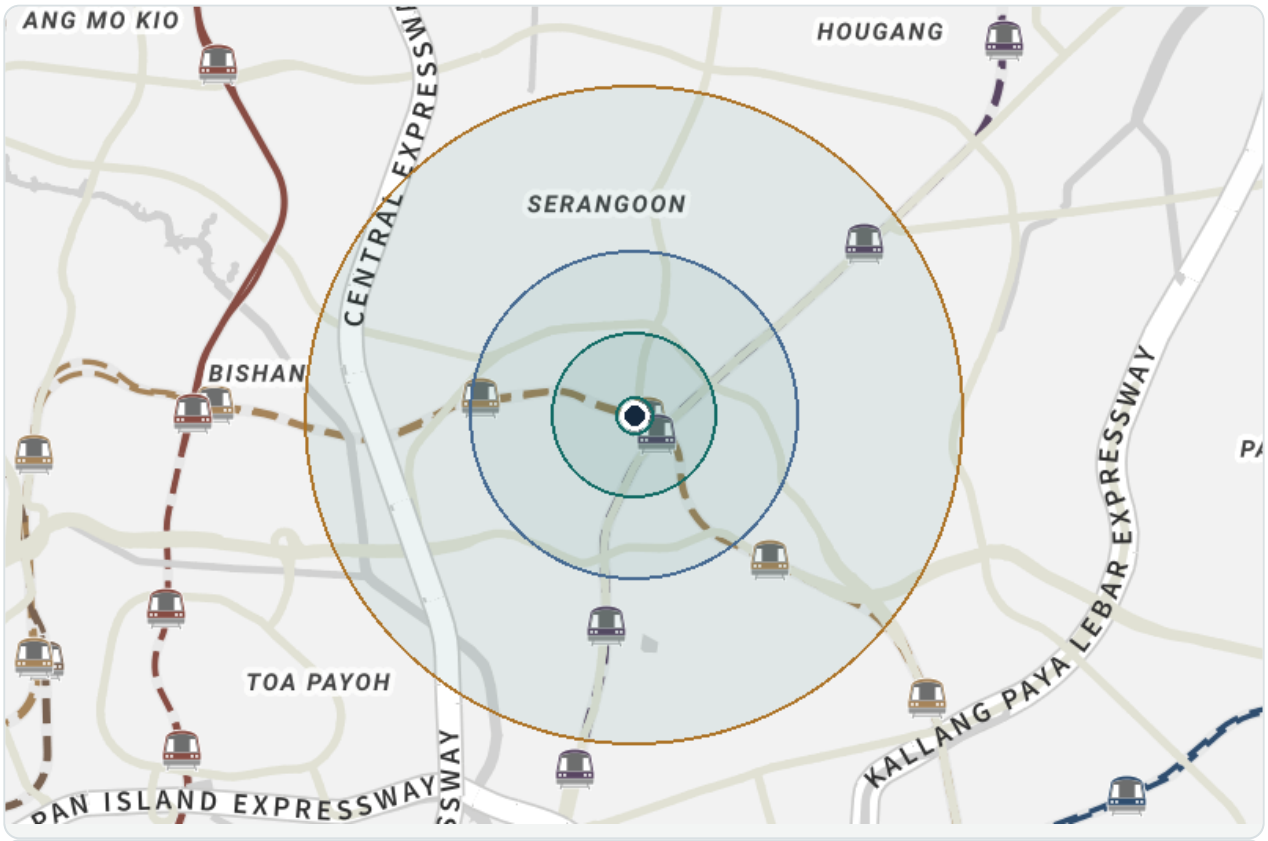
PRINCIPAL OPPORTUNITY

Resident Population Density is the strongest driver toward the community supermarket concept — contributing 35.0 of a possible 35.0 points.

This is a data-driven pattern observation based on the signals the engine measures, not investment advice. It does not consider your brand, operations, financing, or market knowledge — verify against a real site visit and your own numbers.

Location & accessibility

High accessibility — SERANGOON INTERCHANGE is reachable within a 0-5-min walk from the site, but actual interchange capture is unverified.



IMMEDIATE CATCHMENT

Residents (0-500m)	**17,370**
Residents (500m-1km)	**34,253**
Residents / km² (0-500m)	**22,116**

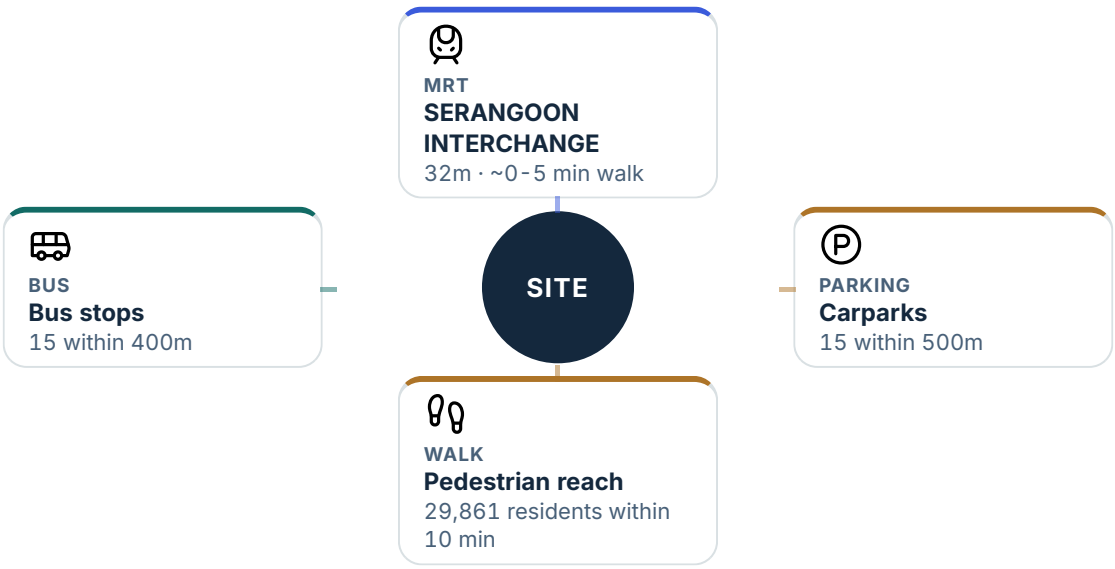
A dense immediate catchment — about 17,370 residents within the primary ring.

Residents are area-weighted estimates assuming uniform density within each subzone (Census 2020).

Verify on site: Walk the primary ring and confirm footfall at the site's main access points.

Site · Primary (0-500m) · Secondary (500m-1km) · Fringe (1-2km)

How people reach the site



Powered by OneMap · © Singapore Land Authority

Subzone **SERANGOON CENTRAL** Zone **WHITE**

Source: Map: OpenStreetMap contributors (ODbL) · Subzone boundaries: URA/SingStat

Trade-area catchment

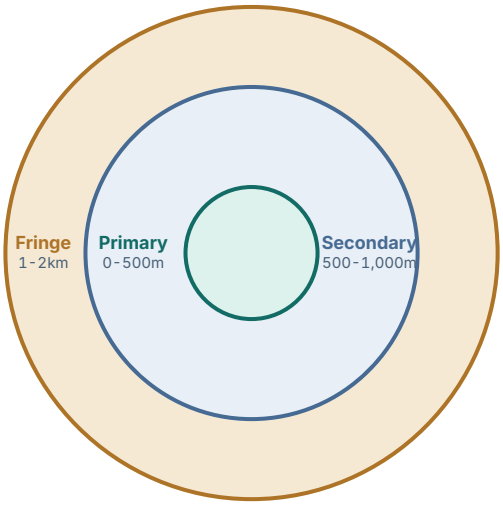
A dense residential catchment — about 17,370 residents within 500m.

Incremental values per ring — what lives in each band, not cumulative totals. Residents are an area-weighted estimate from subzone totals (estimated from subzone population totals assuming uniform density within each subzone).

Access anchor — SERANGOON INTERCHANGE, 32m

1 · RESIDENT CATCHMENT

Trade-area catchment at a glance



Primary · 0-500m

17,370
residents added

22,116/km²
density

Dense immediate catchment — most relevant to repeat and convenience visits.

Secondary · 500-1,000m

34,253
residents added

14,537/km²
density

Adds population plus schools and childcare — relevant to family and after-school demand.

Fringe · 1-2km

104,066
residents added

11,042/km²
density

Adds a large population base, but density and walk-in probability decline.

Schematic — rings not drawn to geographic scale (the outer ring spans 1-2km). Residents are incremental per band, area-weighted from Census 2020 subzone totals.

Per-ring detail — transport, schools, land use

PRIMARY RING
0-500m

17,370 residents

modelled

20 bus stops · 1 rail stations — SERANGOON INTERCHANGE (32m) · 3,909 carpark lots

22,116 residents/km² · 25.5 bus stops/km²

Dense immediate catchment — most relevant to repeat and convenience visits.
Primary local-access catchment (0-500m straight-line); actual walk-in origins and pedestrian volumes are not measured.

SECONDARY RING
500-1000m

34,253 residents

modelled

42 bus stops · 1 rail stations — LORONG CHUAN (912m) · 4,661 carpark lots

14,537 residents/km² · 17.8 bus stops/km²

Adds population plus schools and childcare — relevant to family and after-school demand.
Secondary surrounding catchment (500m–1km straight-line).

FRINGE RING
1000-2000m

104,066

residents modelled

103 bus stops · 3 rail stations — nearest 2 of 3: BARTLEY (1,205m), WOODLEIGH (1,289m) · 13,685 carpark lots

11,042 residents/km² · 10.9 bus stops/km²

Adds a large population base, but density and walk-in probability decline.
Potential destination catchment (1–2km) — customer origins are not measured.

How the catchment changes: a circular residential catchment understates non-residential accessibility near a major interchange — transit riders can reach the site from beyond these rings.

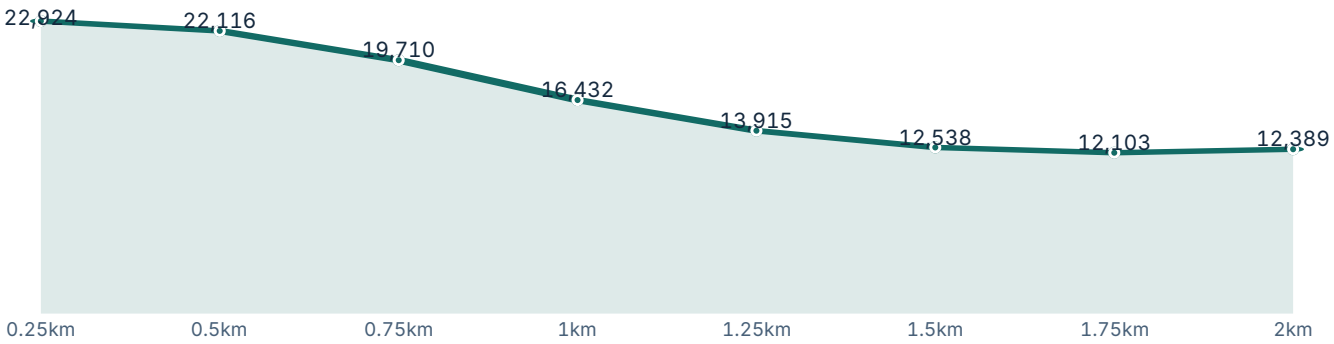
Resident density: 77.3/100 against all published Singapore subzones, and ~79th percentile among the 269 commercially zoned peer sites — the catchment is not among Singapore's very densest residential subzones, but it is unusually resident-dense for a commercially zoned peer site.

DECISION INSIGHT

The immediate catchment is resident-heavy: 17,370 people in the 0–500m band and 34,253 in the 500m–1km band, for 51,623 cumulative within 1km. The 76.7 percentile affluence is above mid-range but not an elite trade area. Demand character is therefore dense nearby households suited to frequent, value-anchored community supermarket trips, not a premium-only destination.

155,689 total residents within 2km across all three rings · 165 bus stops · 22,255 carpark lots

Resident density by distance from the site (residents per km², cumulative within each radius) — demand concentrates near the site and falls outward.



2 · WALKING REACH

Walk-time zones from the site's geocoded coordinate via OpenRouteService's pedestrian network — the summary is CUMULATIVE (within N minutes); the cards below are incremental bands (what lives in each zone).

Walkable reach is broadly efficient

29,861 cumulative residents within 10 min

33 transit nodes · 16 schools/childcare

Within a 10-minute walk the modelled pedestrian network reaches 29,861 residents — 101% of what an equal-area circle would hold. At this scale the network does not produce an unusually constrained catchment relative to that circle; actual entrance routes, crossings and indoor mall circulation remain unverified.

Reach percentage compares modelled walk reach against an equal-area circle; it is not capped at 100% (the modelled catchment can exceed the benchmark) and displayed values round to whole percentages.

0-5 MINUTES

mapped street network

7,700 residents

modelled

12 transit nodes · 2 schools/childcare · 1,255 carpark lots

22,972 residents/km² · 6 carparks · 1 anchors

Land use: other 22% · commercial 36% · residential 38% · institutional 4%

5-10 MINUTES

mapped street network

22,161

residents modelled

21 transit nodes · 14 schools/childcare · 5,567 carpark lots

19,988 residents/km² · 20 carparks · 0 anchors

Land use: other 29% · business 0% · commercial 1% · residential 58% · institutional 12%

10-15 MINUTES

mapped street network

24,161

residents modelled

34 transit nodes · 14 schools/childcare · 572 carpark lots

13,246 residents/km² · 6 carparks · 0 anchors

Land use: other 28% · business 0% · commercial 1% · residential 66% · institutional 5%

Method and limitations: Computed from the site's geocoded coordinate on the OpenStreetMap path network. Does not account for building entrances, indoor mall circulation, escalators/lifts, or covered/elevated walkways — actual walk times inside large complexes may differ from what is shown here.

Cumulative walking reach

Walkable reach — 101% of an equal-area circle

Within 5 minutes	Within 10 minutes	Within 15 minutes
7,700 residents	**29,861** residents	**54,022** residents
12 transit · 2 schools	21 transit · 14 schools	34 transit · 14 schools

3 · LAND USE AND DEMAND CONTEXT

Share of land area by use within each ring — from URA zoning data (see Source below).

Residential use remains dominant from the primary ring through the fringe; commercial land is a minority share even at the site.

SITE PARCEL
WHITE
The site's own parcel zoning is the anchor of its planning context.

→

PRIMARY · 0-500M
Residential-led
Res 54% · Com 16%
Mixed-use character — repeat local demand with a commercial draw present.

→

SECONDARY · 500-1000M
Residential-led
Res 62% · Com 1%
commercial ▮ 15pts, residential ▮ 8pts vs inner
Residential-led — repeat neighbourhood demand is the plausible primary driver.

→

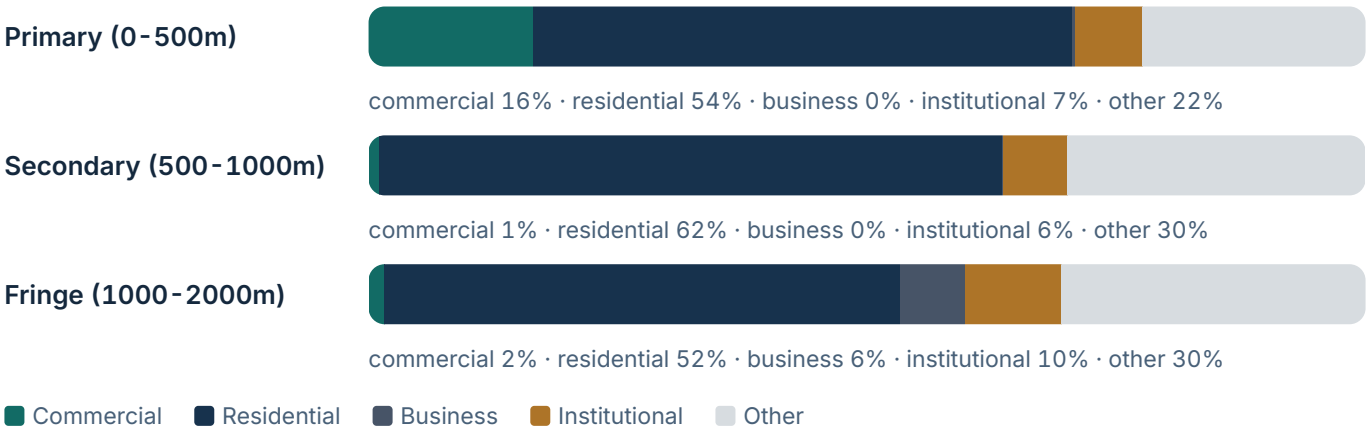
FRINGE · 1000-2000M
Residential-led
Res 52% · Com 2%
commercial ▮ 0pts, residential ▮ 11pts vs inner
Residential-led — repeat neighbourhood demand is the plausible primary driver.

Commercial-vs-residential balance: residential use leads throughout (54% vs 16% commercial in the primary ring) — demand here is neighbourhood-led.

Decomposed 'Other': at 0-500m the 'Other' share (22%) is mostly water (0%), reserve & other (0%), roads & transport (20%); at 500-1000m the 'Other' share (30%) is mostly water (1%), reserve & other (0%), roads & transport (24%); at 1000-2000m the 'Other' share (30%) is mostly water (2%), reserve & other (4%), roads & transport (20%). 'Other' is non-building land in the URA Master Plan 2025 — roads, transport infrastructure, water, open space, reserve sites and uncategorised land. It occupies real area but is not 'land-use character'.

Daypart hypothesis — an inference, not a measured fact. The residential-led mix points to repeat neighbourhood activity across daytime and evening hours; destination demand is more likely to depend on the transit connection than on the immediate land-use mix alone.

A peer land-use benchmark (comparable commercial sites) is not available from the current datasets — this section compares the site against its own surrounding rings instead.



4 · AFFLUENCE AND HOUSING

Affluence and housing profile

SERANGOON CENTRAL · Census 2020 dwelling type by subzone

Key conclusion: a higher-income resident base — planning-area household income is 22% above the median planning area, while HDB resale values sit around the middle of HDB towns.

SPENDING-POWER EVIDENCE — HOUSEHOLD INCOME

Median monthly household income — planning area vs median planning area

SERANGOON

$11,318 /month

planning-area median household income

22% above

$2,054 above

MEDIAN PLANNING AREA

$9,264 /month

median of 30 published planning areas

PLANNING-AREA INCOME RANK



23rd-lowest among 30 published planning areas

76.7 percentile · Census 2020 employed-household income

HOW TO READ THIS COMPARISON

- Census 2020 — a 6-year-old vintage; it does not move with the current economy.
- Planning-area geography (the whole planning area), not subzone and not the catchment.
- Employed households — the published distribution is based on households with at least one employed person.
- This benchmarks the planning area's residents; it is not a direct measurement of the 500m/1km catchment, or of the site's visitors.

CUSTOMER & HOUSING COMPOSITION

Housing composition — share of residents



HDB 78.1%
Condo 16.4%
Landed 5.0%
Other 0.5%

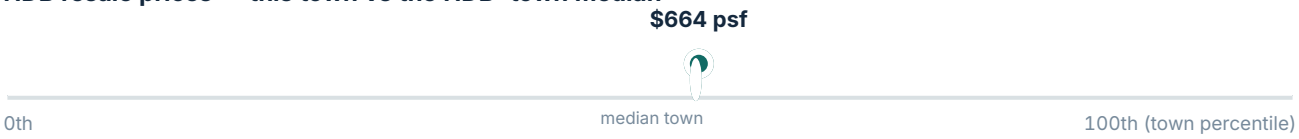
HDB room-type mix — % of HDB residents



3-room 19.8%
4-room 54.5%
5-room/exec 25.6%

PROPERTY-MARKET EVIDENCE — HDB RESALE

HDB resale prices — this town vs the HDB-town median

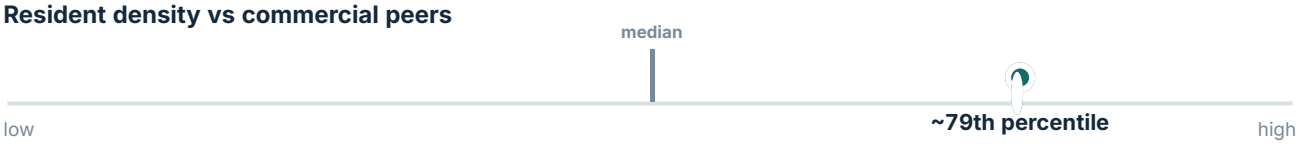


54th percentile — $5 psf (0.8%) above the median town's $659 psf.

Measurement: trailing-12-month transaction average; the town figure is Serangoon's average psf over 325 transactions; the benchmark is the median of the 26 HDB towns' average psf, towns equal-weighted.

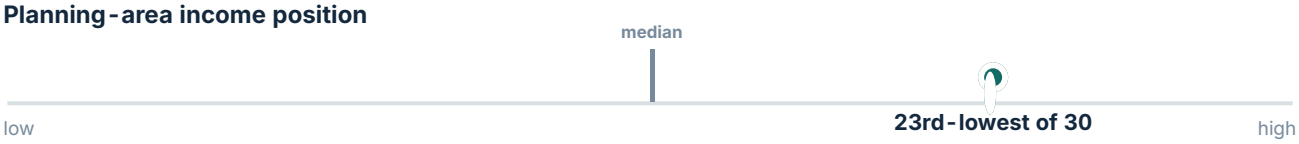
Commercial read

Resident density vs commercial peers



the site's 0-500m resident density among 269 commercially zoned peer sites

Planning-area income position



median employed-household income among 30 published planning areas (Census 2020)

The site has a substantial absolute residential catchment — 17,370 residents within 500m and 51,623 within 1km — although its modelled density sits at the 79th percentile of the 269-site commercial benchmark, with 78% of residents in HDB flats. Combined with higher relative affluence (76.7 percentile), this is a dense premium market that supports premium formats and higher tickets.

DECISION INSIGHT

The resident base skews higher-income: planning-area income is 22% above the median planning area, so a premium-led format is more viable than a value-led one -- with HDB resale values mid-range relative to other towns ($664 psf, 54th percentile of the 26 HDB towns), signalling strong locational demand rather than private housing stock.

- Don't treat the catchment as uniformly low-income — 16% of residents live in condos.
- Interchange traffic introduces demand not represented by resident-income data alone.

Source: Residents: SingStat Census 2020 (modelled allocation) · Transit: LTA · Carparks: HDB/URA · Anchors: curated/MOE/ECDA

Concept-fit assessment

Community Supermarket fits this site with a 98.8/100 match — the gap to the next concept is 1.7 points.

Five weighted categories sum to the 98.8/100 fit score. Expand a category to see its underlying signals.

How scoring works

The match is grouped into decision-facing categories; each bar shows points earned out of that category's possible weight, and they sum to 98.8/100. Fit % is how well the observed value matches this concept's ideal range — not the raw value itself; a low value can still earn full credit if the concept prefers it low. Points = Fit % × Weight, normalised so each category's rows sum to its bar.

Market demand — **38.8 / 40.0** — 97% of available — The size and spending power of the resident catchment

Signals behind market demand

Signal	Value (0-100)	Weight	Fit %	Direction	Points
resident population density (among all published Singapore subzones)	77.3	0.35	100%	strong	+35.0
	Resident population density is the heaviest-weighted demand signal and returns a strong fit; for a community supermarket this means the core everyday customer base is present in the immediate rings. Operationally, the store should lead with fresh staples and everyday value rather than destination or specialty lines.				
catchment affluence (among 30 published planning areas)	76.7	0.05	77%	strong	+3.8
	Catchment affluence sits at the 76.7 percentile of the modelled distribution, above mid-range but with the smallest point contribution among the signals. The store should avoid premium-only positioning and maintain a value-anchored community range.				

Accessibility — **35.0 / 35.0** — 100% of available — How easily customers can reach the site without a car

Signals behind accessibility

Signal	Value (0-100)	Weight	Fit %	Direction	Points
transit connectivity	100.0	0.20	100%	strong	+20.0
	Transit connectivity is at the top of its range and the site sits 32m from Serangoon Interchange with 2 rail stations within 1km. The store may need fast-basket entry/exit and clear sightlines from interchange approaches; this commuter fill-in is a hypothesis, not measured footfall.				
car access	76.5	0.15	100%	strong	+15.0
	Car access is strong but not maximal, implying drive-up trips are possible but not the site's sole support. A mixed basket strategy—convenient walk-up plus targeted car pick-up—better matches the data than a big-box, car-only format.				

Site & zoning **15.0 / 15.0** 100% of available — Whether the site itself is retail-viable

Signals behind site & zoning

Signal	Value (0-100)	Weight	Fit %	Direction	Points
zoning suitability	52.7	0.15	100%	moderate	+15.0
	Zoning suitability is a full fit, though the underlying value is moderate; this suggests the site clears the necessary permission threshold but is not an exceptional zoning story. The operator should still confirm specific permitted retail uses, loading, and back-of-house constraints inside NEX.				

Competitive headroom **10.0 / 10.0** 100% of available — Room to enter given nearby competitors

Signals behind competitive headroom

Signal	Value (0-100)	Weight	Fit %	Direction	Points
competition level	40.0	0.10	100%	moderate competition	+10.0
	Competition measured 40/100 (Moderate band). This profile grants full fit once competition is at or above its acceptability floor, so the signal carries its full (small) weight here — the live count behind this score is in the Competition section.				
	Competition level is measured as moderate, with 9 direct supermarkets and no close-substitute entries recorded. This means the entry cannot rely on being the only supermarket; assortment, price, or speed within the community segment must differentiate it from the incumbents already within metres.				

Total fit score — 98.8/100

Source: SingStat Census 2020 · LTA transit · URA Master Plan 2025 land use · MOE/ECDA · curated lists · Competition: Google Places Aggregate (count only, live)

Full signal coverage — which of the 18 signals influence this score

Every signal is computed for every site; only the ones this concept's profile weights actually move the match score. "Used" means weighted in the Community Supermarket profile; a computed-but-unweighted signal is diagnostic context, not a drag or a driver.

Signals used for this concept

Signal	Computed	Concept weight	Reason
resident population density (among all published Singapore subzones)	Yes		no format was pre-selected — every format in the category was evaluated and ranked
catchment affluence (among 30 published planning areas)	Yes		no format was pre-selected — every format in the category was evaluated and ranked
zoning suitability	Yes		no format was pre-selected — every format in the category was evaluated and ranked
transit connectivity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
competition level	Yes		no format was pre-selected — every format in the category was evaluated and ranked
car access	Yes		no format was pre-selected — every format in the category was evaluated and ranked

Additional diagnostic signals

Signal	Computed	Concept weight	Reason
tourist/heritage precinct	Yes		no format was pre-selected — every format in the category was evaluated and ranked
school proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
tertiary-institution proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
hospital proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
park proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
office (daytime-worker) density	Yes		no format was pre-selected — every format in the category was evaluated and ranked

Signal	Computed	Concept weight	Reason
childcare proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
mall proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
hotel proximity	Yes		no format was pre-selected — every format in the category was evaluated and ranked
family-flat share	Yes		no format was pre-selected — every format in the category was evaluated and ranked
multi-generation household share	Yes		no format was pre-selected — every format in the category was evaluated and ranked
age-band mix (elderly / children / young-adult)	Yes		no format was pre-selected — every format in the category was evaluated and ranked

Peer comparison unavailable — at least 30 comparable sites are required for a reference distribution; 0 stored for this concept. A single point without a reference set would be misleading, so it is not shown.

Concept comparison

Concept fit — ranked tiers

PRIMARY FIT

1	**Community Supermarket** Driven by Resident Population Density · Catchment Affluence the biggest drag	98.8
2	Premium Supermarket Driven by Catchment Affluence · Resident Population Density the biggest drag	97.1

Field observations

1

Observe flows

Entrance routes, queues and dayparts

> Observe entrance routes, queues and footfall at the unit across weekday and weekend dayparts.

2

Test competitors

Speed, offers, seating and unmet occasions

> Observe how the 9 direct supermarkets, especially the leading direct competitor and a direct competitor within 109m, price and assort everyday fresh/staples; this will reveal whether differentiation can come from price or must come from range/service.

3

Validate economics

Rent, ticket, throughput and margin

> Measure the actual trip mission and basket size of nearby residents in Serangoon Central versus mall visitors, because population density is strong but spending per trip is unobserved.

> Confirm physical loading, storage and delivery access inside NEX, since zoning suitability and car access are model-fit signals but site-specific operational constraints are not in the data.

DECISION INSIGHT

Community Supermarket leads with 98.8 against Premium Supermarket's 97.1, a 1.7-point gap. That is too narrow to be commercially decisive; both formats score from the same dense residential and transit signals. The requested concept's edge is one of mission—frequent community baskets—rather than a structural site advantage.

Takeaway: The site supports community and premium formats about equally; the final call should be made on merchandising and tenant-mix fit, not the ...

Competitive landscape

Moderate pressure — 9 nearby supermarket-category businesses within 300m.

Moderate (40/100) 9 nearby supermarket-category listings within 300m



Moderate pressure — differentiation matters, but entry is not blocked.

The aggregate count measures broad supermarket-category pressure. Of 9 nearby businesses identified within 300 m when this report was generated (6 Sep 2026), 9 are direct competitors. Business names appear only on the hosted web report, for 30 days after it is generated.

Data and classification notes

This report shows competitor intensity as a score plus a count. Named competitor listings — including category, rating, and price level — are available on the hosted web view only, where they are sourced live from Google Places and expire 30 days after generation; they are never included in the PDF or a saved copy, because Google's terms restrict using named Places data in retained documents.

Source: Competition count: Google Places Aggregate (300m), live at report generation — counts only, no named competitors shown

Methodology

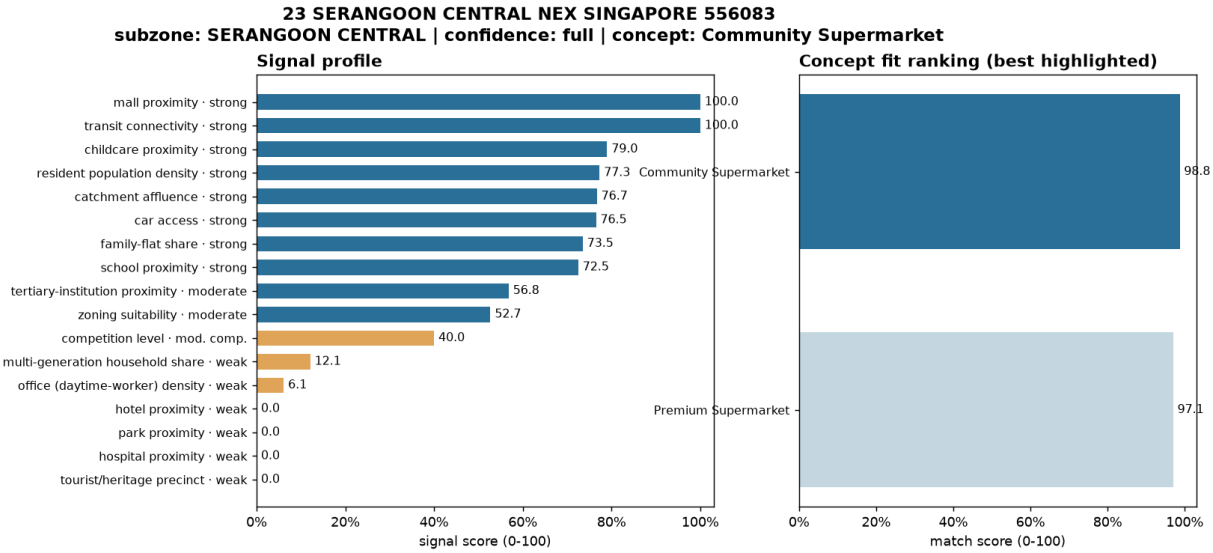
Signal observations and scores (0-100)

These are the underlying signal observations behind the contribution-chart categories above. Most are 0-100 percentiles or suitability measures against official Singapore statistics (SingStat Census 2020, URA Master Plan 2025 land use, gazetted 1 Dec 2025) — a fixed government-sourced reference, not a growing pool of past reports; a few are raw share observations (the age-band row shows subzone age shares as percentages). The overall match score is separately benchmarked against a frozen, dated sample of comparable sites where one exists (see the benchmark line in the executive overview) — not against this report or the sites that have been scored before. The Direction column explains what a score means for the decision (for example, competition is inverted: a low score means heavy competition). This section is the full audit trail — most readers only need the category chart above.

Signal	Score	Direction
resident population density	77.3	strong
tourist/heritage precinct	0.0	weak
catchment affluence	76.7	strong
zoning suitability	52.7	moderate
transit connectivity	100.0	strong
school proximity	72.5	strong
tertiary-institution proximity	56.8	moderate
hospital proximity	0.0	weak
park proximity	0.0	weak
office (daytime-worker) density	6.1	weak
competition level	40.0	moderate competition
childcare proximity	79.0	strong
mall proximity	100.0	strong
car access	76.5	strong

Signal	Score	Direction
hotel proximity	0.0	weak
family-flat share	73.5	strong
multi-generation household share	12.1	weak
age-band mix (elderly / children / young-adult)	elderly 20.6% · children 9.5% · young-adult 21.5%	age-band shares (Census 2020)

Full signal-profile and concept-comparison chart (as computed by the engine):



Concept fit ranking

Concept	Match score
Community Supermarket	98.8
Premium Supermarket	97.1

Trade-area catchment (cumulative)

Cumulative counts within each distance, for exact lookup.

Metric	Within 500m	Within 1km	Within 2km
Estimated residents	17,370	51,623	155,689
Bus stops	20	62	165
Rail stations	1	2	5
Carparks	15	34	103
Carpark lots	3,909	8,570	22,255
malls	1	1	1
parks	0	0	0
hotels	0	0	0
tertiary	0	1	1
childcare	8	26	83
hospitals	0	0	0
schools (K-12)	2	3	15

Nearest named anchors (full list)

Name	Type	Distance
NEX	Mall	0 m
MY FIRST SKOOL	Childcare centre	168 m
ZHONGHUA SECONDARY SCHOOL	Primary/secondary school	412 m
NANYANG JUNIOR COLLEGE	Junior college	647 m

This is a data-driven pattern observation, not a recommendation. The right concept also depends on your brand, operations, and market knowledge.

Decision insights are generated automatically from the report's measured signals and model rules. They are not individually reviewed by a human consultant. Decision insights are produced by an AI model (deepseek-v4-pro) at report generation from this report's own computed data — a data-driven pattern observation, not investment advice. The deterministic scores and analysis in this report are computed without AI.