

Aldi, Neath: Retail Need & Impact Addendum



Executive Summary

- Aldi Stores Ltd submitted a planning application to Neath Port Talbot County Borough Council in August 2019 for a new store on Neath Abbey Road (Ref: P2019/5304).
- Following discussions and agreement with officers, and the Council's retail advisor, a new household shopping survey was commissioned by Aldi, and was undertaken in October/November 2019 by an independent research company, NEMS.
- This new primary survey data has been used to update the Retail Need and Impact Assessment originally submitted by Aldi in August 2019. The data and revised assessment is presented in this Addendum.
- The Addendum has been prepared to enable the Council to conclude a re-consultation process, and to assist the Council in determining the planning application.
- The updated 2019 survey and this Addendum, finds that:
 - I. Aside from the changes as a result of the closure of the Tesco Store at Water Street in Neath town centre, there have been no major changes in convenience shopping patterns in Neath since 2012. This means that results of the updated impact assessment are broadly consistent with those of the earlier assessment.
 - II. The impact of the Aldi proposal on stores within the town centre is likely to be limited. The level of diversion from the centre as a whole (-3.73%) is considered low given the context and, in our view, will not have a significantly adverse effect on the centre's trading performance and function.
 - III. It is relevant to note that the forecast growth in expenditure between 2019 and 2024 (Table 3) represents nearly 80% of the proposed Aldi store's turnover. This alone demonstrates an expenditure capacity for additional convenience goods floorspace in the survey area over the forecast period.
 - IV. Stores at the edge of Swansea continue to be a major draw for Neath residents, particularly given improvements to quality and choice of provision in the Llansamlet area since 2012 (establishment of Aldi and refurbishment and updated format of Tesco). A large proportion of spending on main food shopping continues to leak to these stores from Neath (Zone 1 of the revised survey area).
 - V. It is anticipated that £5.5m of annual spending that is currently drawn to stores in Swansea will be retained in Neath by the proposal. This 'clawback' together with competition with the dominant Tesco at Neath Abbey Road, is also likely to generate positive spin off effects towards

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the town centre, as shoppers supplement their trips to Aldi with other local shopping trips (in contrast to a one-stop shop at a superstore). This 'clawback' will assist in increasing the market share of convenience goods expenditure retained within Neath, which will also increase more sustainable travel patterns.

- The analysis demonstrates that as a result, quantitative capacity will exist for the broad scale of development proposed in the assessment year (2024).
- It is clear that the Aldi proposal will not have a significant adverse impact on the nearby centres. There is clear quantitative and qualitative need for new convenience retail floorspace in the town. On this basis, the proposal is considered to meet all of the relevant retail policy tests. The associated updated Retail Need and Impact Assessment Tables are appended to this document.

1. Introduction

- 1.1. This document provides an Addendum and update on Aldi's response to retail policy matters in relation to the store proposal on the land adjacent to CSN Precision Engineering, Neath Abbey Road, Neath (NPTCBC Application Reference: P2019/5304).
- 1.2. This document should be read alongside Planning Potential's Planning and Retail Statement (including a full numerical Retail Need and Impact Assessment), submitted to NPT in August 2019.
- 1.3. The following sections, summarise the key elements of the convenience shopping patterns collated from the recent household survey; provide an explanation of the assessment methodology and data inputs, before presenting and analysing the results of the updated retail impact and quantitative capacity/needs assessment.

2. Review of 2019 Household Survey Data

- 2.1. The previous 2012 evidence base was prepared following a survey of 800 responses from eight study zones covering Neath Port Talbot and parts of Bridgend, Rhondda Cynon Taf, Swansea and Powys. Following discussions with the Council's appointed retail consultant (Avison Young), the more recent 2019 survey (commissioned by Aldi) obtained specific responses from 200 residents within survey Zone 1, and 100 responses from each of survey zones 2, 7 and 8. The more recent survey should therefore provide a more statistically reliable indication of local shopping patterns. The extent of the additional survey was agreed with the Council's consultant in advance.
- 2.2. Key findings from the more recent survey results are as follows:
 - Tesco Neath Abbey Road, while still holding a dominant position in the town (receiving 25% of convenience spending), is slightly less popular as both a main food shopping destination and top-up shopping destination than anticipated within the originally submitted assessment.
 - Based on the 2012 household survey, Lidl's store at the Vale of Neath retail park to the north of the town centre had an unusually low turnover. The 2019

survey indicates that this store is a popular destination, receiving around 8% of zone 1 spending on main food shopping.

- Considering their separation from Neath, stores in Swansea continue to be very popular among Neath residents, receiving 18% of spending on main food shopping and 15% of overall spending on convenience goods. Stores in Llansamlet are particularly popular, potentially given the improvements to quality and choice of provision in the area since 2012 (for example, the establishment of Aldi and refurbishment of Tesco). The Aldi store alone is more popular among Neath residents as a first choice main food shopping destination than the Lidl store at the Vale of Neath retail Park.
- The popularity of main food shopping via the internet among Neath residents has more than doubled between 2012 and 2019. It now accounts for almost 5% of spending.

Zones 2, 7, and 8 Shopping Preferences

- 2.3. While this analysis focuses on Neath (Zone 1), updated shopping patterns for the neighbouring zones (Zone 2 to the east; Zone 7 to the west; and Zone 8 to the north), were also obtained through the 2019 household survey. This data is used within the accompanying assessment, and enables an empirical identification of 'inflow' of expenditure from Zones 2, 7 and 8.

3. Revised Retail Need & Impact Assessment Methodology

- 3.1. The August 2019 Planning & Retail Statement contained a traditional step-by-step trade draw analysis to calculate the likely retail impacts of the proposed Aldi store on the surrounding shopping destinations.
- 3.2. This established the population and available convenience goods expenditure within the Zone 1 catchment (Neath), and the wider study area. The Assessment then distributed that spending across the existing stores using the shopping preferences gathered by the 2012 household survey to create a baseline trading position. The proposed Aldi store was then introduced into the Assessment, with judgements made on how much trade each store was likely to divert from existing stores, and what the resulting level of adverse impact on the trade of those stores would be.
- 3.3. To enable a clear comparison, the updated numerical need and impact assessment (enclosed with this Addendum at Appendix A) follows the same methodology, with updated data inputs as requested by the Council and their appointed retail advisor.
- 3.4. Population and expenditure data has been sourced from Pitney Bowes (Table 1), together with updated available convenience goods expenditure figures, derived from Mintel 2019 (Table 2). The assessment has been updated to 2017 prices.
- 3.5. The principal change in the assessment is the use of the NEMS household survey data obtained in October/November 2019. This has been used to replace the older 2012 data within the numerical assessment, providing a more detailed and up to date picture of local shopping habits.

- 3.6. The above methodology and adjustments are considered to result in an updated need and impact assessment that is both proportionate and robust in line with national policy and guidance, and local policy.

4. Retail Need

Quantitative Retail Need

- 4.1. Following the submission of the application and the Planning & Retail Statement, we have engaged directly with the Council's appointed retail adviser, and have sought to respond to the relevant queries that have been raised. A further 'Retail Policy Update' note was issued in December 2019, following which additional queries were received regarding the methodology adopted.
- 4.2. This Addendum has therefore been issued to include a revised set of assessment tables that respond to the queries raised and that correct some errors within the approach presented previously. The revised set of tables presented with this Addendum include the following:
- Population and expenditure data (Tables 1-3)
 - Convenience goods trading patterns (in both 2019 and 2024 (Tables 5 and 7))
 - The proposed store turnover (Table 8)
 - Benchmark trading figures for stores within Zone 1 (Table 9)
 - A revised capacity assessment (Table 10)
 - Retail impact assessment (Table 11).
- 4.3. As agreed with Avison Young, the revised assessment has adopted Zone 1 (Neath) as the primary catchment of the proposed store. Through discussion with Avison Young, it became clear that in the previously submitted assessment, four existing convenience goods stores/destinations that are located in Glynneath and Resolven had been included incorrectly within the survey-derived turnover for Zone 1. We have rectified this error within this Addendum and, for ease of reference/comparison, these stores are highlighted within Tables 5 and 7, and are excluded from the survey-derived 2019 Zone 1 turnover presented in Table 10.
- 4.4. Using the results of the 2019 survey, we have modelled the expenditure drawn to stores located within Zone 1 that derives from residents living in other zones (i.e. Zones 2, 7 and 8 specifically). This represents an empirical identification of 'inflow' of expenditure from those zones.
- 4.5. In addition, the assessment of capacity set out in Table 10 includes an element of expenditure 'inflow' from beyond Zones 1, 2, 7 and 8. The level of inflow (4% of survey-derived Zone 1 turnover) has been derived by reference to and consistent with the level of inflow shown within the Council's evidence base (the 2012 NPT Retail Study).
- 4.6. Table 10 sets out an assessment of quantitative retail capacity in 2024. The 2019 survey indicates that Zone 1 currently has a relatively low market share of retained expenditure (72%) that reflects the high level of expenditure leakage away from Neath to alternative destination in Port Talbot, Pontardawe and (particularly)

Swansea. This is indicative of unsustainable travel patterns, including for example expenditure leakage from Zone 1 to the existing Aldi store in Llansamlet.

- 4.7. The proposed Aldi store seeks to help address this issue and 'clawback' lost expenditure to enable more sustainable travel patterns. This will enable Neath to secure a higher level of market share in 2024 and is reflected in Table 10 now submitted.
- 4.8. Table 10 demonstrates quantitative capacity for the broad scale of development and represents a quantitative need for the proposed Aldi store.

Qualitative Need

- 4.9. In addition to quantitative need, the submitted Planning & Retail Statement (August 2019) considered qualitative need in general terms. In particular, and as referenced above, it should be noted that a significant level of annual convenience goods expenditure is attracted to stores outside of Zone 1, in particular to stores to the east of Swansea, including £3.5m to the existing Aldi store at Llansamlet. This is a significant level of expenditure 'leakage' that is indicative of a qualitative deficiency in discount food provision in the Neath area.
- 4.10. The proposed new store facility will enhance the local convenience goods retail choice, and improve competition and choice in the local area, reducing the loss of expenditure identified. The proposal will help to address unnecessary journeys from the Neath area to Swansea, and will also reduce the number of shopping trips taking place to other out-of-centre stores in the Neath area that have poorer links to the town centre (notably Tesco at Neath Abbey Road).
- 4.11. Paragraphs 4.3.12 to 4.3.17 of PPW provide useful guidance with reference to the 'need' test. When qualitative need is considered, the advice confirms that consideration should be given to both positive and negative aspects, and provides examples of where qualitative need may be an important consideration. The examples of qualitative need stated are not exhaustive.
- 4.12. In summary, however, the keys aspects that are relevant to this particular case are:
- The proposed development site is accessible by walking, cycling and public transport
 - The development will contribute to a substantial reduction in car journeys, particularly those associated with expenditure 'leaking' from the Neath area to alternative facilities in the east of Swansea (particularly the existing Aldi store at Llansamlet)
 - The store will assist in alleviating 'over-trading' at the Tesco Neath Abbey Road store, and will help to reduce traffic congestion associated with shoppers accessing the Tesco store via the Neath Abbey Road/A474 roundabout
 - The store will help to address the deficiency in Aldi store provision in the Neath area, highlighted by the high level of expenditure being drawn to Aldi's store at Llansamlet.

- 4.13. Each of these matters is relevant to the consideration of this case, and notwithstanding consideration of quantitative need, qualitative need exists that is sufficient to demonstrate that the 'need' test set by both national and local policy is met in this case.

Waterstone Estates Limited – Court of Appeal Judgment (July 2018)

- 4.14. We are aware that the Waterstone Estates judgment has been referenced within objections to the application proposal that have been submitted by Lidl.
- 4.15. It is important to note that in the judgment, although it is confirmed that the establishment of retail 'need' is a discrete requirement of planning applications (for retail development outside town centres), that is not the end of the matter. The judgment confirms (paragraph 70) that:

"it is not true to say that if an applicant for planning permission for new retail development cannot establish need then that is fatal to the application. National planning policy is of course a material consideration; but a policy is only a policy. If a particular policy requirement is not met, it must be open to the decision maker to grant planning permission if other material considerations outweigh identified planning harm including harm that results from a failure to comply with that requirement. Even proposed development that is contrary to the local development plan, which has the entrenched importance given to it by section 38(6), may be granted permission if other material considerations outweigh that inconsistency." (Our emphasis).

- 4.16. In this case, we consider that the retail need test is passed, and that there are material considerations that justify the grant of planning permission.

5. Retail Impact Assessment and Conclusions

Retail Impact of ALDI Proposal

- 5.1. The August 2019 retail impact assessment Table 11 displayed the estimated impacts of the proposed Aldi store on existing stores in the catchment and beyond.
- 5.2. Based on the new household survey data, an updated retail impact is present as Table 11 (Appendix A of this document). This sets out judgments regarding trade diversion from existing stores within the survey area. In overall terms, we consider that 11% of the proposed store's turnover will be diverted from existing stores within Neath town centre (most notably, Morrisons). We consider that the proposed Aldi store is most likely to compete with other main stores (for example, Tesco Neath Abbey Road) and the existing Aldi store in Llansamlet, which attracts a high proportion of expenditure from the Neath area.
- 5.3. The result of applying these predicted diversions to the new set of data is a range of impacts that are similar to those shown in the original assessment. For example, an adverse impact of -3.73% is predicted on Neath town centre's overall convenience goods trade.

5.4. The table below summarises the more detailed analysis presented in Appendix A:

	Pre-ALDI proposal			Post ALDI proposal			
	2019 (£m)	2024 (£m)	Growth (£m)	% ALDI Turnover	Diversion (£m)	New T/O (£m)	Impact (%)
Morrisons, Riverside Drive	21.43	22.00	0.57	10%	1.18	20.82	-5.39
Iceland, High Street	2.68	2.75	0.07	1%	0.12	2.63	-4.31
Town Centre Total*	34.05	34.95	0.90	11%	1.30	33.65	-3.73
Lidl, Vale of Neath Retail Park	10.90	11.18	0.29	5%	0.59	10.59	-5.30
Tesco, Neath Abbey Road	32.53	33.38	0.86	30%	3.55	29.83	-10.65
ALDI, Llansamlet	18.47	19.07	0.60	25%	2.96	16.11	-15.54
Swansea Stores Total*	127.39	131.63	4.24	47%	5.57	126.06	N/A

Table 2: ALDI retail impact summary. *Note: Total includes stores other than those listed

- 5.5. Based on the above analysis, we consider that:
- 5.6. The impact of the ALDI proposal on stores within the town centre is likely to be limited, with an impact of -3.73% forecast in 2024. The level of diversion from the centre as a whole is considered low and, in our view, will not have a significantly adverse effect on either store's or centre's trading performance and function.
- 5.7. Currently, 15% (or £17m) of Neath residents' convenience expenditure is lost to stores in Swansea (principally to the ALDI, Tesco, and ASDA in Llansamlet). The Aldi proposal is likely to claw back over £5.5m of this lost expenditure, with associated beneficial effects anticipated.
- 5.8. Reflecting their positions in the retail hierarchy, Briton Ferry and Skewen District Centres largely provide small-scale top-up convenience provision for local residents. No impact on these centres is anticipated as a result of the ALDI proposal.
- 5.9. All of the above analysis relates to convenience goods trade diversion and impact. In reality, the town centre as a whole has a much broader shopping and service offer, recently bolstered by the new Wilkos development. As a result, overall impacts on the centre as a result of the Aldi proposal will be much smaller than the numerical impact figures expressed in this analysis.
- 5.10. As stated within the August P&RS, Aldi stores dedicate approximately 20% of their floorspace to comparison goods. Rather than traditional comparison goods, these goods are sold as 'special purchases' on a 'when it's gone, it's gone' basis. This approach is highly seasonal and there is a continued variation in the type of goods that may be on offer.
- 5.11. The anticipated comparison goods turnover of the Aldi store is forecast to be only £2.5 million per annum in 2019 and £2.7 million in 2024. This a very small proportion (less than 10%) of the growth in comparison goods spending in the survey area between 2019 and 2024. As a result, impact on the comparison goods sector is likely to be negligible.
- 5.12. Based on the information supplied to the Council to date, together with the above supplementary considerations, we very strongly consider that it is highly unlikely that the ALDI proposal would result in a 'significant adverse impact' on the Town Centre.

6. Appendices

Updated March 2020 Retail Tables.

ALDI Neath Retail Assessment Update March 2020

Table 1: Population 2019 to 2024

Zone	2019	2022	2024
1	55,825	56,228	56,228
2	38,702	38,933	38,941
7	56,449	57,228	57,354
8	12,744	12,857	12,854
<i>Total</i>	<i>163,720</i>	<i>165,246</i>	<i>165,377</i>

Table 2: Per Capita Convenience Goods Expenditure 2019 to 2024 (£)

Zone	2019	2022	2024
1	1,933	1,940	1,969
2	1,955	1,965	1,995
7	1,926	1,924	1,962
8	2,011	2,020	2,050

Table 3: Total Available Convenience Goods Expenditure 2019 to 2024 (£)

Zone	2019	2022	2024
1	£107.89	£109.08	£110.69
2	£75.66	£76.50	£77.67
7	£108.73	£110.09	£112.55
8	£25.63	£25.97	£26.35
<i>Total</i>	<i>£317.92</i>	<i>£321.64</i>	<i>£327.26</i>

Notes

1) Population and Expenditure data sourced from Pitney Bowes

2) Currency figures in 2017 prices

Table 5: Destination Turnovers 2019 (£m)

Destination	Main Food 1st				Main Food 2nd				Top-up 1st				Top-up 2nd				
	1	2	7	8	1	2	7	8	1	2	7	8	1	2	7	8	
NEATH TOWN CENTRE																	
Iceland, High Street	0.49	0.00	0.00	0.07	1.18	0.00	0.00	0.08	0.25	0.00	0.00	0.00	0.60	0.00	0.00	0.00	2.68
M&S, Green Street	0.51	0.00	0.00	0.07	2.45	0.00	0.21	0.00	1.58	0.00	0.00	0.08	0.73	0.00	0.35	0.06	6.04
Spar, Windsor Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.40	0.00	0.00	0.00	0.49
Inflow to Zone 1 from Zones 2, 7 & 8 (£m)	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.06	0.09	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.50
Local Shops Neath Town Centre	0.49	0.00	0.00	0.00	0.21	0.00	0.00	0.19	1.04	0.00	0.00	0.23	0.69	0.00	0.00	0.06	2.91
Morrisons, Riverside Drive	9.10	0.26	0.85	1.24	5.10	0.00	0.00	0.55	2.69	0.00	0.00	0.14	1.42	0.00	0.00	0.10	21.43
<i>Sub-Total</i>	<i>10.59</i>	<i>0.26</i>	<i>0.85</i>	<i>1.45</i>	<i>8.93</i>	<i>0.00</i>	<i>0.21</i>	<i>0.88</i>	<i>5.73</i>	<i>0.00</i>	<i>0.00</i>	<i>0.45</i>	<i>4.13</i>	<i>0.00</i>	<i>0.35</i>	<i>0.22</i>	<i>34.05</i>
Premier (Arborne's) New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71
One Stop, New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.17
Skewen District Centre Stores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17
<i>Sub-Total</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.96</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.08</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>1.05</i>
NEATH OUT OF CENTRE STORES																	
Lidl, Britton Ferry Road	2.36	0.00	0.00	0.69	0.83	0.00	0.00	0.33	1.14	0.00	0.00	0.19	0.16	0.00	0.00	0.00	5.71
Lidl, Vale of Neath Retail Park	3.38	0.00	0.00	0.81	2.92	0.13	0.00	0.91	2.27	0.00	0.00	0.23	0.20	0.00	0.00	0.04	10.90
B&M Riverside Drive Neath	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.27
Tesco, Neath Abbey Road	17.16	0.62	0.00	2.93	3.75	0.44	0.00	1.33	4.19	0.10	0.00	0.74	1.21	0.00	0.00	0.06	32.53
Tesco Express, Waunceirch	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	0.00	0.00	0.00	0.41	0.00	0.00	0.14	0.92
Tesco Express, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.01	0.00	0.00	0.00	0.53	0.00	0.00	0.00	2.54
CK'S Supermarket, Cimla Road, Neath	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.00	0.53	0.00	0.00	0.00	1.23
Nisa Local, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42
Spar, Heol Caredig, Tonna, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
Tesco Express, Neath Road, Britton Ferry	0.15	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.55	0.15	0.00	0.04	0.20	0.00	0.00	0.20	1.39
Nisa Local, Britton Ferry Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
Co-op, Main Road, Bryncoch, Neath	0.22	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.51	0.00	0.40	0.10	0.00	0.00	0.00	0.04	1.40
Costcutter Seven Sisters, Neath	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.06	0.37
Co-op, High Street, Glynneath	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.88	0.00	0.00	0.00	0.48	1.65
Tesco Express/Esso, Glynneath	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.59	0.00	0.00	0.00	0.30	0.96
Premier, High Street, Cwmgwarch (Glynneath)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00	0.29
Premier, Heol Llwynon, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08
Cadoxton District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08
Crynant Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.32
Resolven Village Centre	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.55
<i>Sub-Total</i>	<i>23.85</i>	<i>0.62</i>	<i>0.00</i>	<i>4.79</i>	<i>7.71</i>	<i>0.57</i>	<i>0.00</i>	<i>2.76</i>	<i>12.24</i>	<i>0.25</i>	<i>0.40</i>	<i>3.91</i>	<i>3.49</i>	<i>0.00</i>	<i>0.00</i>	<i>1.31</i>	<i>61.88</i>
<i>Neath Sub-Total</i>	<i>34.43</i>	<i>0.88</i>	<i>0.85</i>	<i>6.24</i>	<i>16.64</i>	<i>0.57</i>	<i>0.21</i>	<i>3.64</i>	<i>18.94</i>	<i>0.25</i>	<i>0.40</i>	<i>4.36</i>	<i>7.70</i>	<i>0.00</i>	<i>0.35</i>	<i>1.53</i>	<i>96.97</i>
Iceland, Heibronn Way, Aberfan Centre	0.00	1.23	0.00	0.00	0.00	0.44	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.26	0.00	0.00	2.42
Tesco, Prior Street	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.49
Local Shops PT Town Centre	0.00	9.93	0.00	0.00	0.41	2.99	0.00	0.00	0.00	2.88	0.00	0.00	0.00	0.27	0.00	0.00	16.48
<i>Sub-Total</i>	<i>0.00</i>	<i>11.15</i>	<i>0.00</i>	<i>0.00</i>	<i>0.41</i>	<i>3.43</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>5.14</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>1.31</i>	<i>0.00</i>	<i>0.00</i>	<i>21.45</i>
PORT TALBOT OUT OF CENTRE STORES																	
Iceland Food Warehouse, Aberavon Rd	0.00	0.95	0.00	0.00	0.00	1.44	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.98	0.00	0.00	3.47
Lidl, Baglan Bay Retail Park	0.29	5.25	0.00	0.00	0.10	2.99	0.00	0.00	0.17	2.00	0.00	0.00	0.00	1.17	0.00	0.00	11.97
Morrisons, Baglan Moor	1.37	8.30	0.00	0.00	0.82	3.49	0.81	0.06	0.09	2.70	0.00	0.00	0.00	0.83	0.00	0.04	18.52
Aldi, Commercial Road, Talbach	0.49	4.38	0.00	0.00	0.00	1.30	0.00	0.00	0.00	1.43	0.00	0.00	0.00	0.15	0.00	0.00	7.75
Port Talbot Convenience Stores	0.00	1.75	0.00	0.00	0.00	0.31	0.00	0.00	0.17	2.21	0.00	0.00	0.00	1.05	0.00	0.00	5.50
<i>Sub-Total</i>	<i>2.16</i>	<i>20.63</i>	<i>0.00</i>	<i>0.00</i>	<i>0.93</i>	<i>9.54</i>	<i>0.81</i>	<i>0.06</i>	<i>0.43</i>	<i>8.45</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>4.18</i>	<i>0.00</i>	<i>0.04</i>	<i>47.22</i>
<i>Port Talbot sub-Total</i>	<i>2.16</i>	<i>31.78</i>	<i>0.00</i>	<i>0.00</i>	<i>1.34</i>	<i>12.97</i>	<i>0.81</i>	<i>0.06</i>	<i>0.43</i>	<i>13.60</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>5.49</i>	<i>0.00</i>	<i>0.04</i>	<i>68.67</i>
PONTARDAWE																	
Tesco Superstore, Pontardawe	0.71	0.00	1.83	0.00	0.00	0.25	0.00	0.06	0.00	0.15	0.40	0.00	0.00	0.15	0.00	0.00	3.55
Lidl, Flordd Parc Ynysydw, Pontardawe	0.71	0.00	0.00	0.07	0.00	0.00	0.51	0.11	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	1.46
Farm Foods, Pontardawe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.29
Local Shops, Pontardawe Town Centre	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
<i>Sub-Total</i>	<i>1.43</i>	<i>0.00</i>	<i>1.83</i>	<i>0.18</i>	<i>0.00</i>	<i>0.25</i>	<i>0.51</i>	<i>0.17</i>	<i>0.29</i>	<i>0.15</i>	<i>0.40</i>	<i>0.06</i>	<i>0.00</i>	<i>0.15</i>	<i>0.00</i>	<i>0.00</i>	<i>5.41</i>
NEATH PORT TALBOT TOTAL	38.02	32.66	2.68	6.42	17.98	13.79	1.52	3.86	19.65	13.99	0.80	4.41	7.70	5.65	0.35	1.57	171.05
Swansea Stores																	
ALDI, Samlet Road Llansamlet	3.58	0.00	8.35	0.77	0.52	0.00	1.02	0.08	0.25	0.00	2.79	0.00	0.40	0.00	0.71	0.00	18.47
Lidl, Trallwn Road, Llansamlet	0.00	0.00	3.81	0.00	0.00	0.00	1.19	0.00	0.00	0.00	1.10	0.00	0.00	0.08	1.13	0.00	7.31
ASDA, Upper Forest Way Llansamlet	0.72	0.70	8.27	0.66	0.88	0.00	3.23	0.25	0.17	0.10	0.71	0.00	0.00	0.15	0.88	0.14	16.85
Tesco Extra, Nantyllyn Road, Llansamlet	2.85	1.19	8.49	0.38	0.26	0.25	4.60	0.00	0.71	0.34	1.79	0.17	0.77	0.00	0.35	0.00	22.16
Iceland, Phoenix Way, Llansamlet	0.00	0.00	0.50	0.00	0.72	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.92
Farm Foods, Llansamlet	0.00	0.00	0.00	0.00	0.15	0.00	0.41	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.76
Home Bargains, Poenix Way, Llansamlet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.60
Other Swansea Stores	2.50	1.65	19.19	0.32	1.64	0.68	9.34	0.36	0.47	0.93	15.43	0.06	0.40	0.26	5.77	0.32	59.32
<i>Swansea Sub-Total</i>	<i>9.65</i>	<i>3.55</i>	<i>48.60</i>	<i>2.13</i>	<i>4.16</i>	<i>0.93</i>	<i>20.50</i>	<i>0.69</i>	<i>1.59</i>	<i>1.36</i>	<i>22.03</i>	<i>0.23</i>	<i>1.57</i>	<i>0.49</i>	<i>9.43</i>	<i>0.45</i>	<i>127.39</i>
Bridgend Stores	0.00	0.00	0.00	0.14	0.00	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0	0.19	0	0	0.76
Merthyr Stores	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
Other Stores	2.27	0.60	0.00	3.17	0.00	0.13	0.30	0.84	1.41	0.53	0.00	0.74	0.16	0.11	0.00	0.28	10.53
OUTSIDE NPT TOTAL	11.92	4.15	48.60	5.55	4.16	1.48	20.										

Table 7: Destination Turnovers 2024 (£m)

Destination	Main Food 1st				Main Food 2nd				Top-up 1st				Top-up 2nd				
	1	2	7	8	1	2	7	8	1	2	7	8	1	2	7	8	
NEATH TOWN CENTRE																	
Iceland, High Street	0.50	0.00	0.00	0.07	1.21	0.00	0.00	0.09	0.26	0.00	0.00	0.00	0.62	0.00	0.00	0.00	2.75
M&S, Green Street	0.52	0.00	0.00	0.07	2.51	0.00	0.21	0.00	1.62	0.00	0.00	0.08	0.75	0.00	0.36	0.06	6.20
Spar, Windsor Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.41	0.00	0.00	0.00	0.50
Inflow to Zone 1 from Zones 2, 7 & 8 (£m)	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.06	0.09	0.00	0.00	0.00	0.39	0.00	0.00	0.00	0.51
Local Shops Neath Town Centre	0.50	0.00	0.00	0.00	0.21	0.00	0.00	0.19	1.07	0.00	0.00	0.24	0.71	0.00	0.00	0.06	2.99
Morrisons, Riverside Drive	9.34	0.27	0.88	1.27	5.23	0.00	0.00	0.56	2.76	0.00	0.00	0.14	1.45	0.00	0.00	0.10	22.00
Sub-Total	10.86	0.27	0.88	1.49	9.16	0.00	0.21	0.90	5.88	0.00	0.00	0.46	4.23	0.00	0.36	0.23	34.95
Premier (Arborne's) New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73
One Stop, New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.17
Skewen District Centre Stores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17
Sub-Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.07
NEATH OUT OF CENTRE STORES																	
Lidl, Britton Ferry Road	2.42	0.00	0.00	0.71	0.85	0.00	0.00	0.34	1.17	0.00	0.00	0.20	0.17	0.00	0.00	0.00	5.86
Lidl, Vale of Neath Retail Park	3.47	0.00	0.00	0.83	3.00	0.13	0.00	0.94	2.33	0.00	0.00	0.24	0.21	0.00	0.00	0.04	11.18
B&M Riverside Drive Neath	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.28
Tesco, Neath Abbey Road	17.61	0.64	0.00	3.01	3.85	0.45	0.00	1.36	4.30	0.10	0.00	0.76	1.24	0.00	0.00	0.06	33.38
Tesco Express, Waunceirch	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.00	0.00	0.00	0.42	0.00	0.00	0.14	0.95
Tesco Express, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.07	0.00	0.00	0.00	0.54	0.00	0.00	0.00	2.61
CK'S Supermarket, Cimla Road, Neath	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.00	0.00	0.54	0.00	0.00	0.00	1.27
Nisa Local, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43
Spar, Heol Caredig, Tonna, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
Tesco Express, Neath Road, Britton Ferry	0.15	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.56	0.15	0.00	0.04	0.21	0.00	0.00	0.20	1.43
Nisa Local, Britton Ferry Rpad	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
Co-op, Main Road, Bryncoch, Neath	0.22	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.52	0.00	0.42	0.10	0.00	0.00	0.00	0.04	1.45
Costcutter Seven Sisters, Neath	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.06	0.38
Co-op, High Street, Glynneath	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.00	0.00	0.00	0.49	1.69
Tesco Express/Esso, Glynneath	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.31	0.99
Premier, High Street, Cwmgwrach (Glynneath)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.00	0.00	0.30
Premier, Heol Llwynon, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08
Cadoxton District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08
Crynant Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.33
Resolven Village Centre	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.00	0.57
Sub-Total	24.47	0.64	0.00	4.92	7.91	0.58	0.00	2.84	12.55	0.25	0.42	4.01	3.58	0.00	0.00	1.35	63.52
Neath Sub-Total	35.33	0.91	0.88	6.41	17.07	0.58	0.21	3.74	19.43	0.25	0.42	4.48	7.90	0.00	0.36	1.58	99.54
Iceland, Heilbronn Way, Aberfan Centre	0.00	1.26	0.00	0.00	0.00	0.45	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.26	0.00	0.00	2.48
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.50
Tesco, Prior Street	0.00	10.19	0.00	0.00	0.42	3.07	0.00	0.00	0.00	2.96	0.00	0.00	0.00	0.27	0.00	0.00	16.92
Local Shops PT Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31	0.00	0.00	0.00	0.81	0.00	0.00	2.12
Sub-Total	0.00	11.45	0.00	0.00	0.42	3.52	0.00	0.00	0.00	5.28	0.00	0.00	0.00	1.34	0.00	0.00	22.02
PORT TALBOT OUT OF CENTRE STORES																	
Iceland Food Warehouse, Aberavon Rd	0.00	0.97	0.00	0.00	0.00	1.48	0.00	0.00	0.00	0.10	0.00	0.00	0.00	1.01	0.00	0.00	3.56
Lidl, Baglan Bay Retail Park	0.30	5.39	0.00	0.00	0.11	3.06	0.00	0.00	0.17	2.06	0.00	0.00	0.00	1.20	0.00	0.00	12.29
Morrisons, Baglan Moor	1.41	8.52	0.00	0.00	0.85	3.59	0.84	0.06	0.09	2.78	0.00	0.00	0.00	0.85	0.00	0.04	19.02
Aldi, Commercial Road, Talbach	0.50	4.49	0.00	0.00	0.00	1.34	0.00	0.00	0.00	1.47	0.00	0.00	0.00	0.16	0.00	0.00	7.96
Port Talbot Convenience Stores	0.00	1.80	0.00	0.00	0.00	0.32	0.00	0.00	0.17	2.27	0.00	0.00	0.00	1.08	0.00	0.00	5.64
Sub-Total	2.21	21.18	0.00	0.00	0.95	9.79	0.84	0.06	0.44	8.68	0.00	0.00	0.00	4.29	0.00	0.04	48.47
Port Talbot sub-Total	2.21	32.62	0.00	0.00	1.38	13.31	0.84	0.06	0.44	13.96	0.00	0.00	0.00	5.64	0.00	0.04	70.50
PONTARDAWE																	
Tesco Superstore, Pontardawe	0.73	0.00	1.90	0.00	0.00	0.26	0.00	0.06	0.00	0.15	0.42	0.00	0.00	0.16	0.00	0.00	3.67
Lidl, Ffordd Parc Ynsysderw, Pontardawe	0.73	0.00	0.00	0.07	0.00	0.00	0.52	0.11	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	1.50
Farm Foods, Pontardawe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30
Local Shops, Pontardawe Town Centre	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
Sub-Total	1.46	0.00	1.90	0.18	0.00	0.26	0.52	0.17	0.30	0.15	0.42	0.06	0.00	0.16	0.00	0.00	5.58
NEATH PORT TALBOT TOTAL	39.00	33.53	2.77	6.60	18.45	14.15	1.58	3.97	20.16	14.36	0.83	4.54	7.90	5.79	0.36	1.62	175.61
Swansea Stores																	
ALDI, Samlet Road Llansamlet	3.68	0.00	8.64	0.79	0.53	0.00	1.06	0.09	0.26	0.00	2.89	0.00	0.41	0.00	0.73	0.00	19.07
Lidl, Trailwn Road, Llansamlet	0.00	0.00	3.94	0.00	0.00	0.00	1.24	0.00	0.00	0.00	1.14	0.00	0.00	0.08	1.17	0.00	7.56
ASDA, Upper Forest Way Llansamlet	0.74	0.72	8.56	0.68	0.90	0.00	3.35	0.25	0.17	0.10	0.73	0.00	0.00	0.16	0.91	0.14	17.41
Tesco Extra, Nantylfin Road, Llansamlet	2.92	1.23	8.79	0.39	0.26	0.26	4.76	0.00	0.72	0.34	1.86	0.18	0.79	0.00	0.36	0.00	22.87
Iceland, Phoenix Way, Llansamlet	0.00	0.00	0.51	0.00	0.74	0.00	0.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.98
Farm Foods, Llansamlet	0.00	0.00	0.00	0.00	0.16	0.00	0.42	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.79
Home Bargains, Phoenix Way, Llansamlet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	0.00	0.62
Other Swansea Stores	2.57	1.70	19.86	0.33	1.68	0.69	9.67	0.37	0.48	0.95	15.98	0.06	0.41	0.26	5.97	0.33	61.32
Swansea Sub-Total	9.90	3.64	50.31	2.19	4.27	0.95	21.22	0.71	1.64	1.40	22.80	0.24	1.61	0.50	9.77	0.47	131.63
Bridgend Stores																	
0.00	0.00	0.00	0.14	0.00	0.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0	0.19	0	0	0.78
Merthyr Stores																	
0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
Other Stores																	
2.33	0.61	0.00	3.26	0.00	0.13	0.31	0.86	1.45	1.45	0.55	0.00	0.76	0.17	0.12	0.00	0.29	10.82
OUTSIDE NPT TOTAL	12.23	4.26	50.31	5.70	4.27	1.52	21.54	1.57	3.09	1.95	22.80	1.00	1.78	0.81	9.77	0.75	143.34
Internet/Delivery	3.00	0.27	2.07	0.61	0.53	0.64	0.52	0.00	0.00	0.00	0.00	0.00	0.28	0.39	0.00	0.00	8.31
TOTAL	54.24	38.06	55.15	12.91	23.24	16.31	23.64	5.53	23.24	16.31	23.64	5.53	9.96	6.99	10.13	2.37	327.26

Notes

Table 8: Proposal Turnover

New Destination	Floorspace (sqm)	Sales Area (sqm)		Sales Density 2019 (£)		Benchmark Turnover 2019 (£m)		Benchmark Turnover 2024 (£m)	
	Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
ALDI, Neath Proposal	1315	1052	263	11,042	9,377	11.62	2.47	11.85	2.70

Notes

- Inflow to Zone 1 from Zones 2, 7 & 8 (£m)
- 2) Proposal convenience/comparison sales area based on an 80%/20% split.
- 3) Floorspace efficiency at +0.4% per annum for convenience goods and +1.8% per annum for comparison goods applied between 2017 and 2022.
- 4) 2017 Prices

Table 9: Benchmark Turnovers

Destination	2019			Total Store	
	Total Net Sales Area (sqm)	Proportion of Conv Goods (%)	Conv Floorspace (sqm)	Company Sales Density (£)	Benchmark Turnover (£/m)
NEATH TOWN CENTRE					
Iceland, High Street	398	95.00%	378.1	7,316	2.77
M&S, Green Street	836	20.00%	167.2	9,430	1.58
Neath Market & Local Shops	n/a	n/a	n/a	n/a	1.22
Inflow to Zone 1 from Zones 2, 7 & 8 (£m)	3577	80.00%	2861.6	12,852	36.78
<i>Sub-Total</i>	n/a	n/a	n/a	n/a	42.34
NEATH OUT OF CENTRE STORES					
Lidl, Melyn Parc / Castle Park	846	80.00%	676.8	9,413	6.37
Lidl, Vale of Neath Retail Park	1524	80.00%	1219.2	9,413	11.48
Tesco, Neath Abbey Road	3520	70.00%	2464	11,408	28.11
Tesco Express, Waunceirch	250	95.00%	237.5	11,408	2.71
Other Local Stores Combined	n/a	n/a	n/a	n/a	7.69
<i>Sub-Total</i>	n/a	n/a	n/a	n/a	56.35
<i>Neath Total</i>	n/a	n/a	n/a	n/a	98.69
Destination	2024			Store	
	Total Net Sales Area (sqm)	Proportion of Conv Goods (%)	Conv Floorspace (sqm)	Company Sales Density (£)	Benchmark Turnover (£/m)
NEATH TOWN CENTRE					
Iceland, High Street	398	95.00%	378.1	7,464	2.82
M&S, Green Street	836	20.00%	167.2	9,621	1.61
Neath Market & Local Shops	n/a	n/a	n/a	n/a	1.24
Morrisons, Riverside Drive	3577	80.00%	2861.6	13,111	37.52
<i>Sub-Total</i>	n/a	n/a	n/a	n/a	43.19
NEATH OUT OF CENTRE STORES					
Lidl, Melyn Parc / Castle Park	846	80.00%	676.8	9,603	6.50
Lidl, Vale of Neath Retail Park	1524	80.00%	1219.2	9,603	11.71
Tesco, Neath Abbey Road	3520	70.00%	2464	11,638	28.68
Tesco Express, Waunceirch	250	95.00%	237.5	11,638	2.76
Other Local Stores Combined	n/a	n/a	n/a	n/a	7.69
<i>Sub-Total</i>	n/a	n/a	n/a	n/a	57.34
<i>Neath Total</i>	n/a	n/a	n/a	n/a	100.53

Notes

1) Gross floorspace figures taken from GVA NPT Retail Study 2012

3) Sales Density figures taken from Mintel 2019, projected forward at an annual rate of 0.4% and converted to 2013 prices, with the exception of Out-of-Centre Stores, which maintain their 2019 benchmark

ALDI Neath Retail Assessment Update March 2020 Capacity Assessment Update

Table 10: Capacity

	2019	2024
Available Expenditure in Catchment (Zone 1) (£m)	107.89	110.69
Survey-derived store turnover in the Catchment (Zone 1) (£m)	77.42	90.77
Zone 1 Market Share (%)	72%	82%
Inflow to Zone 1 from Zones 2, 7 & 8 (£m)	-	16.57
Expenditure Inflow from elsewhere (£m)	-	4.47
Total Turnover Potential (£m)	-	111.81
Benchmark Turnover of Conv Goods Facilities (£m)	-	100.53
Residual Expenditure (Capacity) (£m)	-	11.28
Turnover of ALDI Application Proposal (£m)	-	11.85
Residual Capacity Post Proposal Opening (£m)	-	-0.57

Notes

- 1) Available Expenditure (Zone 1) taken from Table 3.
- 2) Survey derived store turnover is the total survey derived turnover from Zone 1
- 3) 'Market Share' is 'survey derived turnover' divided by 'Available Expenditure in Catchment'
- 4) Expenditure inflow to Zone 1 from Zones 2, 7 & 8 is derived from the survey.
Inflow from elsewhere is a cautious estimate (4% of survey-derived Zone 1 turnover). This is consistent with inflow shown in 2012 NPT Study.
- 5) 'Total Turnover Potential' is 'survey derived turnover' plus 'Inflow'
- 6) 'Benchmark Turnover of Convenience Goods Facilities' taken from Table 9 of this Study
- 7) 'Residual Capacity' is 'Total Turnover Potential' less 'Benchmark Turnover of Convenience Goods Facilities'.

Table 11: Retail Impact

Destination	Current Destinations			ALDI Neath Proposal			
	Turnover 2019 (£m)	Turnover 2024 (£m)	Growth 2019-2024	Proportion of Turnover (%)	Diversion (£m)	Post-Impact Turnover (£m)	Retail Impact (%)
NEATH TOWN CENTRE							
Iceland, High Street	2.68	2.75	0.07	1.0%	0.12	2.63	-4.31%
M&S, Green Street	6.04	6.20	0.16	0.0%	0.00	6.20	0.00%
Spar, Windsor Road	0.49	0.50	0.01	0.0%	0.00	0.50	0.00%
Inflow to Zone 1 from Zones 2, 7 & 8 (£m)	0.50	0.51	0.01	0.0%	0.00	0.51	0.00%
Local Shops Neath Town Centre	2.91	2.99	0.08	0.0%	0.00	2.99	0.00%
Morrisons, Riverside Drive	21.43	22.00	0.57	10.0%	1.18	20.82	-5.39%
<i>Sub-Total</i>	<i>34.05</i>	<i>34.95</i>	<i>0.90</i>	<i>11.0%</i>	<i>1.30</i>	<i>33.65</i>	<i>-3.73%</i>
 <i>Premier (Arborne's) New Road, Skewen</i>	 0.71	 0.73	 0.02	 0.0%	 0.00	 0.73	 0.00%
<i>One Stop, New Road, Skewen</i>	 0.17	 0.17	 0.00	 0.0%	 0.00	 0.17	 0.00%
<i>Skewen District Centre Stores</i>	 0.17	 0.17	 0.00	 0.0%	 0.00	 0.17	 0.00%
<i>Sub-Total</i>	<i>1.05</i>	<i>1.07</i>	<i>0.03</i>	<i>0.0%</i>	<i>0.00</i>	<i>1.07</i>	<i>0.00%</i>
NEATH OUT OF CENTRE STORES							
Lidl, Britton Ferry Road	5.71	5.86	0.15	5.0%	0.59	5.27	-10.11%
Lidl, Vale of Neath Retail Park	10.90	11.18	0.29	5.0%	0.59	10.59	-5.30%
B&M Riverside Drive Neath	0.27	0.28	0.01	0.0%	0.00	0.28	0.00%
Tesco, Neath Abbey Road	32.53	33.38	0.86	30.0%	3.55	29.83	-10.65%
Tesco Express, Waunceirch	0.92	0.95	0.02	0.0%	0.00	0.95	0.00%
Tesco Express, Cimla Road, Neath	2.54	2.61	0.07	0.0%	0.00	2.61	0.00%
CK'S Supermarket, Cimla Road, Neath	1.23	1.27	0.03	0.0%	0.00	1.27	0.00%
Nisa Local, Cimla Road, Neath	0.42	0.43	0.01	0.0%	0.00	0.43	0.00%
Spar, Heol Caredig, Tonna, Neath	0.13	0.13	0.00	0.0%	0.00	0.13	0.00%
Tesco Express, Neath Road, Britton Ferry	1.39	1.43	0.04	0.0%	0.00	1.43	0.00%
Nisa Local, Britton Ferry Rpad	0.13	0.13	0.00	0.0%	0.00	0.13	0.00%
Co-op, Main Road, Bryncoch, Neath	1.40	1.45	0.04	0.0%	0.00	1.45	0.00%
Costcutter Seven Sisters, Neath	0.37	0.38	0.01	0.0%	0.00	0.38	0.00%
Premier, Heol Llwynon, Neath	0.08	0.08	0.00	0.0%	0.00	0.08	0.00%
Cadoxton District Centre	0.08	0.08	0.00	0.0%	0.00	0.08	0.00%
Crynant Village Centre	0.32	0.33	0.01	0.0%	0.00	0.33	0.00%
<i>Sub-Total</i>	<i>58.43</i>	<i>59.97</i>	<i>1.54</i>	<i>40.0%</i>	<i>4.74</i>	<i>55.23</i>	<i>N/A</i>
<i>Neath Sub-Total</i>	<i>93.52</i>	<i>96.00</i>	<i>2.47</i>	<i>0.51</i>	<i>6.04</i>	<i>89.95</i>	<i>N/A</i>
PORT TALBOT TOWN CENTRE							
Iceland, Heibronn Way, Aberfan Centre	2.42	2.48	0.06	0.0%	0.00	2.48	0.00%
Home Bargains, Heibronn Way, Aberfan Centre	0.49	0.50	0.01	0.0%	0.00	0.50	0.00%
Tesco, Prior Street	16.48	16.92	0.44	0.0%	0.00	16.92	0.00%
<i>Sub-Total</i>	<i>19.39</i>	<i>19.90</i>	<i>0.51</i>	<i>0.0%</i>	<i>0.00</i>	<i>19.90</i>	<i>0.00%</i>
PORT TALBOT OUT OF CENTRE STORES							
Iceland Food Warehouse, Aberavon Rd	3.47	3.56	0.09	0.0%	0.00	3.56	0.00%
Lidl, Baglan Bay Retail Park	11.97	12.29	0.32	0.0%	0.00	12.29	0.00%
Morrisons, Baglan Moor	18.52	19.02	0.50	0.0%	0.00	19.02	0.00%
Aldi, Commercial Road, Taibach	7.75	7.96	0.21	0.0%	0.00	7.96	0.00%
Port Talbot Convenience Stores	5.50	5.64	0.15	0.0%	0.00	5.64	0.00%
<i>Sub-Total</i>	<i>47.22</i>	<i>48.47</i>	<i>1.26</i>	<i>0.0%</i>	<i>0.00</i>	<i>48.47</i>	<i>N/A</i>
<i>Port Talbot sub-Total</i>	<i>66.60</i>	<i>68.37</i>	<i>1.77</i>	<i>0.0%</i>	<i>0.00</i>	<i>68.37</i>	<i>N/A</i>
PONTARDAWE							
Tesco Superstore, Pontardawe	3.55	3.67	0.11	0.0%	0.00	3.67	0.00%
Lidl, Ffordd Parc Ynsysderw, Pontardawe	1.46	1.50	0.04	0.0%	0.00	1.50	0.00%
Farm Foods, Pontardawe	0.29	0.30	0.01	0.0%	0.00	0.30	0.00%
Local Shops, Pontardawe Town Centre	0.11	0.11	0.00	0.0%	0.00	0.11	0.00%
<i>Sub-Total</i>	<i>5.41</i>	<i>5.58</i>	<i>0.17</i>	<i>0.0%</i>	<i>0.00</i>	<i>5.58</i>	<i>N/A</i>
NEATH PORT TALBOT TOTAL	165.53	169.94	4.41	51.0%	6.04	163.90	N/A
Swansea Stores							
ALDI, Samlet Road Llansamlet	18.47	19.07	0.60	25.0%	2.96	16.11	-15.54%
Lidl, Trallwn Road, Llansamlet	7.31	7.56	0.26	5.0%	0.59	6.97	-7.83%
ASDA, Upper Forest Way Llansamlet	16.85	17.41	0.56	5.0%	0.59	16.82	-3.40%
Tesco Extra, Nantyfffin Road, Llansamlet	22.16	22.87	0.72	10.0%	1.18	21.69	-5.18%
Iceland, Phoenix Way, Llansamlet	1.92	1.98	0.06	0.0%	0.00	1.98	0.00%
Farm Foods, Llansamlet	0.76	0.79	0.03	0.0%	0.00	0.79	0.00%
Home Bargains, Poenix Way, Llansamlet	0.60	0.62	0.02	0.0%	0.00	0.62	0.00%
Other Swansea Stores	59.32	61.32	2.00	2.0%	0.24	61.08	-0.39%
<i>Swansea Sub-Total</i>	<i>127.39</i>	<i>131.63</i>	<i>4.24</i>	<i>47.0%</i>	<i>5.57</i>	<i>126.06</i>	<i>N/A</i>
Bridgend Stores	0.76	0.78	0.02	0.0%	0.00	0.78	0.00%
Merthyr Stores	0.11	0.11	0.00	0.0%	0.00	0.11	0.00%
Other Stores	10.53	10.82	0.29	0.0%	0.00	10.82	0.00%
OUTSIDE NPT TOTAL	138.78	143.34	4.55	47.0%	5.57	137.77	N/A
<i>Internet/Delivery</i>	8.08	8.31	0.23	2.0%	0.24	8.08	-2.85%
TOTAL	312.40	321.60	9.20	100.0%	11.85	309.75	N/A

Notes

1) Trade diversions to proposed store are based on Planning Potential's judgements, informed by Zone 1 shopping patterns, proximity and likely competitive relationship

2) Retail impact is expressed as a percentage of existing centre/retail destination turnover diverted to the proposal in the design year (a -5% impact is 5% of a store's turnover being diverted to the proposal)