

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
Total	163,720	165,246	165,377

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
Total	£317.92	£321.64	£327.26

Notes

- 1) Population and Expenditure data sourced from Pitney Bowes
- 2) Currency figures in 2017 prices

Table 4: Shopping Preferences/Market Shares

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	0.93	0.00	0.00	0.57	5.19	0.00	0.00	1.55	1.12	0.00	0.00	0.00	6.19	0.00	0.00	0.00
M&S, Green Street	0.96	0.00	0.00	0.57	10.81	0.00	0.90	0.00	6.98	0.00	0.00	1.47	7.54	0.00	3.60	2.59
Spar, Windsor Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	0.00	0.00	0.00	4.16	0.00	0.00	0.00
Neath Market, Green Street	0.00	0.00	0.00	0.57	0.00	0.00	0.00	1.04	0.38	0.00	0.00	0.00	2.94	0.00	0.00	0.00
Local Shops Neath Town Centre	0.93	0.00	0.00	0.00	0.91	0.00	0.00	3.51	4.59	0.00	0.00	4.35	7.11	0.00	0.00	2.59
Morrisons, Riverside Drive	17.21	0.71	1.59	9.84	22.52	0.00	0.00	10.16	11.87	0.00	0.00	2.55	14.58	0.00	0.00	4.34
Sub-Total	20.03	0.71	1.59	11.55	39.42	0.00	0.90	16.26	25.31	0.00	0.00	8.37	42.51	0.00	3.60	9.52
NEATH OUT OF CENTRE STORES																
Premier (Arborne's) New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00
One Stop, New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	0.00	0.00	0.00	0.85	0.00	0.00	0.00
Skewen District Centre Stores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.26	0.00	0.00	0.00	0.85	0.00	0.00	0.00
NEATH OUT OF CENTRE STORES																
Lidl, Britton Ferry Road	4.46	0.00	0.00	5.53	3.65	0.00	0.00	6.18	5.05	0.00	0.00	3.56	1.69	0.00	0.00	0.00
Lidl, Vale of Neath Retail Park	6.40	0.00	0.00	6.46	12.90	0.80	0.00	16.94	10.01	0.00	0.00	4.29	2.10	0.00	0.00	1.75
B&M Riverside Drive Neath	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.00	0.38	0.00	0.00	0.00	0.85	0.00	0.00	0.00
Tesco, Neath Abbey Road	32.46	1.67	0.00	23.31	16.56	2.76	0.00	24.64	18.51	0.63	0.00	13.75	12.44	0.00	0.00	2.59
Tesco Express, Waunceirch	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.69	0.00	0.00	0.00	4.18	0.00	0.00	5.89
Tesco Express, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.89	0.00	0.00	0.00	5.45	0.00	0.00	0.00
CK'S Supermarket, Cimla Road, Neath	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.85	0.00	0.00	0.00	5.41	0.00	0.00	0.00
Nisa Local, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, Heol Caredig, Tonna, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Neath Road, Britton Ferry	0.28	0.00	0.00	0.00	0.46	0.00	0.00	0.00	2.43	0.93	0.00	0.73	2.10	0.00	0.00	8.62
Nisa Local, Britton Ferry Rpad	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Main Road, Bryncoch, Neath	0.41	0.00	0.00	1.12	0.00	0.00	0.00	0.00	2.24	0.00	1.76	1.82	0.00	0.00	0.00	1.75
Costcutter Seven Sisters, Neath	0.00	0.00	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.37	0.00	0.00	0.00	2.59
Co-op, High Street, Glynneath	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.30	0.00	0.00	0.00	20.71
Tesco Express/Esso, Glynneath	0.00	0.00	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.88	0.00	0.00	0.00	13.06
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	5.43	0.00	0.00	0.00	0.00
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	0.85	0.00	0.00	0.00
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	0.85	0.00	0.00	0.00
Crynant Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.51	0.00	0.00	0.00	2.47	0.00	0.00	0.00	0.00
Resolven Village Centre	0.00	0.00	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.96	0.00	0.00	0.00	0.00
Sub-Total	45.11	1.67	0.00	38.12	34.02	3.56	0.00	51.28	54.01	1.56	1.76	72.55	35.91	0.00	0.00	56.95
Neath Sub-Total	65.14	2.38	1.59	49.67	73.45	3.56	0.90	67.54	83.58	1.56	1.76	80.92	79.27	0.00	3.60	66.47
PORT TALBOT TOWN CENTRE																
Iceland, Heibronn Way, Aberfan Centre	0.00	3.31	0.00	0.00	0.00	2.77	0.00	0.00	0.00	3.09	0.00	0.00	0.00	3.78	0.00	0.00
Home Bargains, Heibronn Way, Aberfan Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.09	0.00	0.00	0.00	0.00	0.00	0.00
Tesco, Prior Street	0.00	26.77	0.00	0.00	1.82	18.84	0.00	0.00	0.00	18.14	0.00	0.00	0.00	3.91	0.00	0.00
Local Shops PT Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.06	0.00	0.00	0.00	11.54	0.00	0.00
Sub-Total	0.00	30.08	0.00	0.00	1.82	21.61	0.00	0.00	0.00	32.38	0.00	0.00	0.00	19.23	0.00	0.00
PORT TALBOT OUT OF CENTRE STORES																
Iceland Food Warehouse, Aberavon Rd	0.00	2.56	0.00	0.00	0.00	9.06	0.00	0.00	0.00	0.63	0.00	0.00	0.00	14.41	0.00	0.00
Lidl, Baglan Bay Retail Park	0.55	14.17	0.00	0.00	0.46	18.79	0.00	0.00	0.75	12.61	0.00	0.00	0.00	17.15	0.00	0.00
Morrisons, Baglan Moor	2.60	22.39	0.00	0.00	3.64	21.98	3.55	1.04	0.38	17.02	0.00	0.00	0.00	12.21	0.00	1.75
Aldi, Commercial Road, Taibach	0.93	11.81	0.00	0.00	0.00	8.21	0.00	0.00	0.00	9.00	0.00	0.00	0.00	2.23	0.00	0.00
Port Talbot Convenience Stores	0.00	4.72	0.00	0.00	0.00	1.97	0.00	0.00	0.75	13.94	0.00	0.00	0.00	15.44	0.00	0.00
Sub-Total	4.08	55.64	0.00	0.00	4.10	60.01	3.55	1.04	1.88	53.19	0.00	0.00	0.00	61.44	0.00	1.75
Port Talbot sub-Total	4.08	85.72	0.00	0.00	5.92	81.62	3.55	1.04	1.88	85.57	0.00	0.00	0.00	80.67	0.00	1.75
PONTARDAWE																
Tesco Superstore, Pontardawe	1.35	0.00	3.44	0.00	0.00	1.58	0.00	1.04	0.00	0.93	1.76	0.00	0.00	2.23	0.00	0.00
Lidl, Ffordd Parc Ynsysderw, Pontardawe	1.35	0.00	0.00	0.57	0.00	0.00	2.22	2.07	0.00	0.00	0.00	1.09	0.00	0.00	0.00	0.00
Farm Foods, Pontardawe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Pontardawe Town Centre	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total	2.70	0.00	3.44	1.41	0.00	1.58	2.22	3.11	1.27	0.93	1.76	1.09	0.00	2.23	0.00	0.00
NEATH PORT TALBOT TOTAL	71.91	88.10	5.03	51.08	79.36	86.76	6.67	71.69	86.73	88.06	3.52	82.01	79.27	82.90	3.60	68.22
Swansea Stores																
ALDI, Samlet Road Llansamlet	6.78	0.00	15.67	6.14	2.28	0.00	4.48	1.55	1.11	0.00	12.22	0.00	4.10	0.00	7.23	0.00
Lidl, Trallwn Road, Llansamlet	0.00	0.00	7.15	0.00	0.00	0.00	5.23	0.00	0.00	0.00	4.83	0.00	0.00	1.12	11.52	0.00
ASDA, Upper Forest Way Llansamlet	1.36	1.90	15.53	5.25	3.87	0.00	14.16	4.56	0.75	0.63	3.09	0.00	0.00	2.23	9.00	5.89
Tesco Extra, Nantylffin Road, Llansamlet	5.39	3.22	15.94	3.04	1.14	1.58	20.14	0.00	3.12	2.11	7.86	3.21	7.95	0.00	3.60	0.00
Iceland, Phoenix Way, Llansamlet	0.00	0.00	0.93	0.00	3.17	0.00	3.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farm Foods, Llansamlet	0.00	0.00	0.00	0.00	0.68	0.00	1.78	0.00	0.00	0.00	0.89	0.00	0.00	0.00	0.00	0.00
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	6.11	0.00
Other Swansea Stores	4.74	4.46	36.02	2.54	7.24	4.26	40.91	6.68	2.06	5.85	67.59	1.09	4.16	3.78	58.95	13.79
Swansea Sub-Total	18.26	9.58	91.22	16.96	18.38	5.84	89.79	12.79	7.04	8.59	96.48	4.30	16.21	7.13	96.40	19.67
Bridgend Stores	0.00	0.00	0.00	1.12	0.00	2.68	0.00	0.00	0.00	0.00	0.00	0.00	0	2.78	0	0
Merthyr Stores	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Stores	4.29	1.61	0.00	25.24	0.00	0.80	1.32	15.52	6.24	3.35	0.00	13.69	1.68	1.66	0.00	12.11
OUTSIDE NPT TOTAL	22.55	11.19	91.22	44.16	18.38	9.32	91.11	28.31	13.27	11.94	96.48	17.99	17.88	11.57	96.40	31.78
Internet/Delivery	5.54	0.71	3.75	4.76	2.26	3.92	2.22	0.00	0.00	0.00	0.00	0.00	2.85	5.53	0.00	0.00
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Notes

1) Shopping Pattern Data from October 2019 Household Survey by NEMS

2) Weighted data with Nulls Removed

3) Outside of Neath Port Talbot CBC some individual desinations have been categorised for clarity of presentation

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	0.01	0.21	0.00	0.00	0.19	1.04	0.00	0.00	0.23	0.69	0.00	0.00	0.06	2.92
Morrisons, Riverside Drive	9.10	0.26	0.85	0.15	5.10	0.00	0.00	0.55	2.69	0.00	0.00	0.14	1.42	0.00	0.00	0.10	20.35
Sub-Total	10.59	0.26	0.85	0.37	8.93	0.00	0.21	0.88	5.73	0.00	0.00	0.45	4.13	0.00	0.35	0.22	32.97
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
Sub-Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.96	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.05
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 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	0.51	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
Sub-Total	23.85	0.62	0.00	4.79	7.71	0.57	0.00	2.76	12.24	0.25	0.40	3.91	3.49	0.00	0.00	1.31	61.88
Neath Sub-Total	34.43	0.88	0.85	5.16	16.64	0.57	0.21	3.64	18.94	0.25	0.40	4.36	7.70	0.00	0.35	1.53	95.90
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	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
Local Shops PT Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28	0.00	0.00	0.00	0.79	0.00	0.00	2.07
Sub-Total	0.00	11.15	0.00	0.00	0.41	3.43	0.00	0.00	0.00	5.14	0.00	0.00	0.00	1.31	0.00	0.00	21.45
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, Taibach	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
Sub-Total	2.16	20.63	0.00	0.00	0.93	9.54	0.81	0.06	0.43	8.45	0.00	0.00	0.00	4.18	0.00	0.04	47.22
Port Talbot Sub-Total	2.16	31.78	0.00	0.00	1.34	12.97	0.81	0.06	0.43	13.60	0.00	0.00	0.00	5.49	0.00	0.04	68.67
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, Ffordd Parc Ynsydw, 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
Sub-Total	1.43	0.00	1.83	0.18	0.00	0.25	0.51	0.17	0.29	0.15	0.40	0.06	0.00	0.15	0.00	0.00	5.41
NEATH PORT TALBOT TOTAL	38.02	32.66	2.68	5.34	17.98	13.79	1.52	3.86	19.65	13.99	0.80	4.41	7.70	5.65	0.35	1.57	169.98
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, Nantylffin Road, Llansamlet	2.85	1.19	8.49	0.01	0.26	0.25	4.60	0.00	0.71	0.34	1.79	0.17	0.77	0.00	0.35	0.00	21.78
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
Swansea Sub-Total	9.65	3.55	48.60	1.76	4.16	0.93	20.50	0.69	1.59	1.36	22.03	0.23	1.57	0.49	9.43	0.45	127.02
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	5.17	4.16	1.48	20.80	1.52	3.01	1.90	22.03	0.97	1.74	0.79	9.43	0.73	138.41
Internet/Delivery	2.93	0.26	2.00	0.60	0.51	0.62	0.51	0.00	0.00	0.00	0.00	0.00	0.28	0.38	0.00	0.00	8.08
TOTAL	52.87	37.08	53.28	11.11	22.66	15.89	22.83	5.38	22.66	15.89	22.83	5.38	9.71	6.81	9.79	2.31	316.47

Notes

1) Shopping Pattern Data from October 2019 Household Survey by NEMS

2) Preference Weighting is 70/30 Main/Top Up & 70/30 1st/2nd

3) Turnovers Derived from shopping pattern data in Table 4, and available expenditure data from Table 3.

Table 6: Destination Turnovers 2022 (£m)

	Main Food 1st				Main Food 2nd				Top-up 1st				Top-up 2nd				
Destination	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	1.19	0.00	0.00	0.08	0.26	0.00	0.00	0.00	0.61	0.00	0.00	0.00	2.71
M&S, Green Street	0.51	0.00	0.00	0.07	2.48	0.00	0.21	0.00	1.60	0.00	0.00	0.08	0.74	0.00	0.36	0.06	6.10
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
Neath Market, Green Street	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	0.50	0.00	0.00	0.00	0.21	0.00	0.00	0.19	1.05	0.00	0.00	0.24	0.70	0.00	0.00	0.06	2.94
Morrisons, Riverside Drive	9.20	0.27	0.86	1.25	5.16	0.00	0.00	0.55	2.72	0.00	0.00	0.14	1.43	0.00	0.00	0.10	21.68
Sub-Total	10.71	0.27	0.86	1.47	9.03	0.00	0.21	0.89	5.80	0.00	0.00	0.46	4.17	0.00	0.36	0.22	34.43
Premier (Arborne's) New Road, Skewen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72
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	0.16
Sub-Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.98	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.06
NEATH OUT OF CENTRE STORES																	
Lidl, Britton Ferry Road	2.38	0.00	0.00	0.70	0.84	0.00	0.00	0.34	1.16	0.00	0.00	0.19	0.17	0.00	0.00	0.00	5.78
Lidl, Vale of Neath Retail Park	3.42	0.00	0.00	0.82	2.95	0.13	0.00	0.92	2.29	0.00	0.00	0.23	0.21	0.00	0.00	0.04	11.02
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	17.35	0.63	0.00	2.97	3.79	0.44	0.00	1.34	4.24	0.10	0.00	0.75	1.22	0.00	0.00	0.06	32.90
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	0.41	0.00	0.00	0.14	0.93
Tesco Express, Cimla Road, Neath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.04	0.00	0.00	0.00	0.53	0.00	0.00	0.00	2.57
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	1.25
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	0.11	0.00	0.00	0.00	0.56	0.15	0.00	0.04	0.21	0.00	0.00	0.20	1.41
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	0.51	0.00	0.41	0.10	0.00	0.00	0.00	0.04	1.42
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	0.89	0.00	0.00	0.00	0.48	1.67
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	0.31	0.97
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	0.30	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	0.13	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	0.49	0.00	0.00	0.00	0.00	0.56
Sub-Total	24.11	0.63	0.00	4.85	7.79	0.57	0.00	2.80	12.37	0.25	0.41	3.96	3.53	0.00	0.00	1.33	62.59
Neath Sub-Total	34.82	0.89	0.86	6.32	16.82	0.57	0.21	3.68	19.15	0.25	0.41	4.41	7.78	0.00	0.36	1.55	98.08
PORT TALBOT TOWN CENTRE																	
Iceland, Heibronn Way, Aberfan Centre	0.00	1.24	0.00	0.00	0.00	0.44	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.26	0.00	0.00	2.44
Home Bargains, Heibronn Way, Aberfan Centre	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	10.04	0.00	0.00	0.42	3.03	0.00	0.00	0.00	2.91	0.00	0.00	0.00	0.27	0.00	0.00	16.66
Local Shops PT Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	0.00	0.79	0.00	0.00	2.09
Sub-Total	0.00	11.28	0.00	0.00	0.42	3.47	0.00	0.00	0.00	5.20	0.00	0.00	0.00	1.32	0.00	0.00	21.69
PORT TALBOT OUT OF CENTRE STORES																	
Iceland Food Warehouse, Aberavon Rd	0.00	0.96	0.00	0.00	0.00	1.46	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.99	0.00	0.00	3.51
Lidl, Baglan Bay Retail Park	0.29	5.31	0.00	0.00	0.11	3.02	0.00	0.00	0.17	2.03	0.00	0.00	0.00	1.18	0.00	0.00	12.11
Morrisons, Baglan Moor	1.39	8.39	0.00	0.00	0.83	3.53	0.82	0.06	0.09	2.73	0.00	0.00	0.00	0.84	0.00	0.04	18.73
Aldi, Commercial Road, Taibach	0.50	4.43	0.00	0.00	0.00	1.32	0.00	0.00	0.00	1.45	0.00	0.00	0.00	0.15	0.00	0.00	7.84
Port Talbot Convenience Stores	0.00	1.77	0.00	0.00	0.00	0.32	0.00	0.00	0.17	2.24	0.00	0.00	0.00	1.06	0.00	0.00	5.56
Sub-Total	2.18	20.86	0.00	0.00	0.94	9.64	0.82	0.06	0.43	8.55	0.00	0.00	0.00	4.23	0.00	0.04	47.74
Port Talbot sub-Total	2.18	32.13	0.00	0.00	1.36	13.11	0.82	0.06	0.43	13.75	0.00	0.00	0.00	5.55	0.00	0.04	69.43
PONTARDAWE																	
Tesco Superstore, Pontardawe	0.72	0.00	1.86	0.00	0.00	0.25	0.00	0.06	0.00	0.15	0.41	0.00	0.00	0.15	0.00	0.00	3.60
Lidl, Ffordd Parc Ynsysderw, Pontardawe	0.72	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	1.48
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
Sub-Total	1.44	0.00	1.86	0.18	0.00	0.25	0.51	0.17	0.29	0.15	0.41	0.06	0.00	0.15	0.00	0.00	5.47
NEATH PORT TALBOT TOTAL	38.44	33.03	2.71	6.50	18.18	13.94	1.54	3.91	19.87	14.15	0.81	4.47	7.78	5.71	0.36	1.59	172.99
Swansea Stores																	
ALDI, Samlet Road Llansamlet	3.62	0.00	8.45	0.78	0.52	0.00	1.04	0.08	0.25	0.00	2.83	0.00	0.40	0.00	0.72	0.00	18.69
Lidl, Trallwn Road, Llansamlet	0.00	0.00	3.86	0.00	0.00	0.00	1.21	0.00	0.00	0.00	1.12	0.00	0.00	0.08	1.14	0.00	7.40
ASDA, Upper Forest Way Llansamlet	0.73	0.71	8.38	0.67	0.89	0.00	3.27	0.25	0.17	0.10	0.71	0.00	0.00	0.15	0.89	0.14	17.06
Tesco Extra, Nantyffin Road, Llansamlet	2.88	1.21	8.60	0.39	0.26	0.25	4.66	0.00	0.71	0.34	1.82	0.18	0.78	0.00	0.36	0.00	22.42
Iceland, Phoenix Way, Llansamlet	0.00	0.00	0.50	0.00	0.73	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.94
Farm Foods, Llansamlet	0.00	0.00	0.00	0.00	0.16	0.00	0.41	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.77
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	0.61	0.00	0.61
Other Swansea Stores	2.53	1.67	19.43	0.32	1.66	0.68	9.46	0.36	0.47	0.94	15.63	0.06	0.41	0.26	5.84	0.32	60.05
Swansea Sub-Total	9.76	3.59	49.21	2.16	4.21	0.94	20.76	0.70	1.61	1.38	22.31	0.23	1.59	0.49	9.55	0.46	128.95
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	2.29	0.60	0.00	3.21	0.00	0.13	0.31	0.85	1.43	0.54	0.00	0.75	0.16	0.11	0.00	0.28	10.66
OUTSIDE NPT TOTAL	12.05	4.19	49.21	5.62	4.21	1.50	21.06	1.54	3.04	1.92	22.31	0.98	1.76	0.80	9.55	0.74	140.48
Internet/Delivery	2.96	0.27	2.02	0.61	0.52	0.63	0.51	0.00	0.00	0.00	0.00	0.00	0.28	0.38	0.00	0.00	8.17
TOTAL	53.45	37.48	53.95	12.72	22.91	16.06	23.12	5.45	22.91	16.06	23.12	5.45	9.82	6.88	9.91	2.34	321.64

Notes

1) Shopping Pattern Data from October 2019 Household Survey by NEMS

2) Preference Weighting is 70/30 Main/Top Up & 70/30 1st/2nd

3) Turnovers Derived from shopping pattern data in Table 4, and available expenditure data from Table 3.

Table 7: Destination Turnovers 2024 (£m)

[illegible]

Notes

1) Shopping Pattern Data from October 2019 Household Survey by NEMS

2) Preference Weighting is 70/30 Main/Top Up & 70/30 1st/2nd

3) Turnovers Derived from shopping pattern data in Table 4, and available expenditure data from Table 3.

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			2024	
	Total Net Sales Area (sqm)	Proportion of Conv Goods (%)	Conv Floorspace (sqm)	Company Sales Density (£)	Total Store 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
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

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)	-	15.46
Expenditure Inflow from elsewhere (£m)	-	4.43
Total Turnover Potential (£m)	-	110.65
Benchmark Turnover of Conv Goods Facilities (£m)	-	100.53
Residual Expenditure (Capacity) (£m)	-	10.12
Turnover of ALDI Application Proposal (£m)	-	11.85
Residual Capacity Post Proposal Opening (£m)	-	-1.73

Notes

- 1) Available Expenditure (Zone 1) taken from Table 3.
- 2) Survey dervied 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)	Turnover 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	2.92	3.00	0.08	1.0%	0.12	2.88	-3.95%
Morrisons, Riverside Drive	20.35	20.88	0.53	15.0%	1.78	19.10	-8.51%
Sub-Total	32.97	33.84	0.87	17.0%	2.01	31.82	-5.95%
Premier (Arborne's) New Road, Skewen	0.71	0.73	0.02	0.0%	0.00	0.73	0.00%
One Stop, New Road, Skewen	0.17	0.17	0.00	0.0%	0.00	0.17	0.00%
Skewen District Centre Stores	0.17	0.17	0.00	0.0%	0.00	0.17	0.00%
Sub-Total	1.05	1.07	0.03	0.0%	0.00	1.07	0.00%
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%
Sub-Total	58.43	59.97	1.54	40.0%	4.74	55.23	N/A
Neath Sub-Total	92.45	94.89	2.44	0.57	6.75	88.13	N/A
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%
Sub-Total	19.39	19.90	0.51	0.0%	0.00	19.90	0.00%
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%
Sub-Total	47.22	48.47	1.26	0.0%	0.00	48.47	N/A
Port Talbot sub-Total	66.60	68.37	1.77	0.0%	0.00	68.37	N/A
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%
Sub-Total	5.41	5.58	0.17	0.0%	0.00	5.58	N/A
NEATH PORT TALBOT TOTAL	164.46	168.83	4.38	57.0%	6.75	162.08	N/A
Swansea Stores							
ALDI, Samlet Road Llansamlet	18.47	19.07	0.60	20.0%	2.37	16.70	-12.43%
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, Nantyyffin Road, Llansamlet	22.16	22.87	0.71	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	1.0%	0.12	61.20	-0.19%
Swansea Sub-Total	127.39	131.63	4.23	41.0%	4.86	126.77	N/A
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	138.79	143.33	4.54	41.0%	4.86	138.47	N/A
Internet/Delivery	8.08	8.31	0.23	2.0%	0.24	8.08	-2.85%
TOTAL	311.33	320.48	9.15	100.0%	11.85	308.63	N/A

CLAWBACK to Zn1

2.37

0.59

0.59

1.18

0.12

4.86

Notes

1) Trade diversons to propsed store are based on Planning Potential's judgements, informed by Zone 1 shopping pattens, 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)