

Retail Addendum – Update to Retail Impact Assessment

Full Planning Application for a mixed-use development comprising a foodstore (Use Class A1) and coffee shop with drive thru together with associated access, car parking, external lighting, drainage, landscaping, and other associated site works (P2024/0339)

Burrows Yard, Port Talbot

December 2024

Contents

1. Introduction 3

2. Proposal Update 4

3. Convenience Goods Quantitative Need and Impact..... 5

4. Response to representation..... 11

5. Conclusions 13

Appendices

Appendix 1 Retail Impact Assessment Tables – Update

Report title: Retail Addendum – Update to Retail Impact Assessment

Prepared by: Steve Robb

Status: Final

Date: December 2024

For and on behalf of Avison Young (UK) Limited

1. Introduction

- 1.1 This Retail Addendum has been prepared by Avison Young. It is submitted in support of a planning application, on behalf of Aldi Stores Ltd and Neath Port Talbot County Borough Council ("the applicant"), for the development of a discount foodstore and coffee shop (with drive thru) in Port Talbot. The application has reference number P2024/0339 and was validated on 18 June 2024.
- 1.2 This Addendum report has been prepared specifically to update on matters since the submission of the original Planning and Retail Statement and to respond to the letter of representation received from Wm Morrison Supermarkets plc (Morrisons), dated 9 October 2024.
- 1.3 The key changes are outlined at the start of this Addendum, followed by a step-by-step explanation of the methodology adopted and findings from the retail impact assessment. This report should of course continue to be read alongside the other retail policy sections within the original reports, relating to the sequential assessment, healthchecks for defined centres and considerations of planned investment in centres.
- 1.4 This Addendum report is therefore divided into the following sections:
 - Section 2: Proposal Update
 - Section 3: Convenience Quantitative Goods Need and Impact
 - Section 4: Response to representation
 - Section 5: Conclusions

2. Proposal Update

2.1 As part of this Addendum report the opportunity has been taken to update the sales floorspace of the foodstore proposal, to more accurately reflect the sources used for sales density data. These changes are explained in more detail below.

Proposed Net Retail Sales Area

- 2.2 In line with the latest sales density information, Global Data 2023, the definition of what should comprise the “retail space” for the purpose of utilising the sales density data, is that this should be *“the selling area of the store, excluding checkouts, changing rooms and toilets etc.”*
- 2.3 The previous calculation by our client of this area erroneously included areas that should have been excluded. This included for example the large packing area to the rear of the checkouts and the checkouts too. Based on Global Data’s information this would then produce an inaccurate projection for store turnover. Given this, the sales floor space for the proposal has reduced accordingly.
- 2.4 The 1,356 sq.m figure remains as the net internal area, which is the total rectangular internal publicly accessible area. The Net Retail Sales Area does however reduce as a result of the changes above.
- 2.5 The original calculation for the net retail sales floorspace was 1,356 sq.m, with this now reduced to 1,154 sq.m. The breakdown between convenience and comparison sales remains an 80/20 split, with the updated convenience floorspace now 923 sq.m and 231 sq.m for comparison sales.
- 2.6 The respective turnover of the store for convenience and comparison sales would reduce as a result. This is shown in the table below.

Version	Net Sales Floorspace	Convenience Sales Density in 2024 (per sq.m)	Comparison Sales Density in 2024 (per sq.m)	Convenience Turnover in 2029 (test year) (£m)	Comparison Turnover in 2029 (test year) (£m)	Overall Turnover (£m)
Original Statement (May 2024)	1,356 sq.m	£12,961	£5,136	£14.17m	£1.57m	£15.74m
Retail Addendum (Dec 2024)	1,154 sq.m	£12,961	£5,136	£12.06m	£1.33m	£13.39m

Existing Aldi Store - Net Retail Sales Area

2.7 In order to ensure this is properly reflected where relevant, an update on the retail sales floorspace of the Aldi store at Commercial Road District Centre (Taibach), has also been included. This retail sales floorspace is now calculated as 857 sq.m, meaning that the convenience floorspace within that store measures 686 sq.m. Please refer to Table 6B for more details

3. Convenience Goods Quantitative Need and Impact

Quantitative Impact

Table 1 – Turnover of Proposed Development

- 3.1 Table 1a of **Appendix 1** estimates the convenience and comparison goods turnover of the proposals based on average sales densities. As set out in Section 2 of this report and to better accord with the definition of retail space within Global Data 2023, the sales floorspace of the development has been amended to reflect that definition and reduced to 1,154 sq.m. The vast majority given over to the sale of convenience goods (80% / 923 sq.m), with the remainder used for the sale of a purely ancillary range of non-food (comparison) goods (20% / 231 sq.m).
- 3.2 As a result of these amendments, the store would be projected to have a convenience turnover of £12.06m in 2029, and a comparison goods turnover of £1.33m. This is a total turnover of £13.39m. This is a 2022 price year.

Population (Table 2 (a))

- 3.3 The base population (2024) within the 3 Zones was sourced directly from Experian Location Analyst data (May 2024 Report). The baseline population has then been projected forward to the test year of 2029 in line with Experian's growth forecasts. No changes have been made to this data from the original report.
- 3.4 On this basis, the information from Experian indicates for Zone 1, the population is 39,017 in 2024 increasing to 39,560 in 2029.
- 3.5 Overall, the Study Area population is 78,644 in 2024 increasing to 79,942 in 2029.

Per Capita Convenience Expenditure Assumptions (Tables 2 (b) + (c))

- 3.6 As per the original Statement per capita convenience base expenditure data for our catchment area has been sourced from Experian Location Analyst data (May 2024 Report). Our analysis of convenience goods (Table 2b expenditure capacity then draws upon 'forecast' growth rates as set out under Appendix 4a, of the Experian Retail Planner Briefing Note 21 (February 2024).
- 3.7 In terms of an allowance for Non-Store Retail Trade (NSRT) / Special Forms of Trading (SFT) – such as online shopping, etc. – our assessment is based on the allowance identified at Appendix 3, of Experian's Retail Planner Briefing Note 21, February 2024. This is based upon assumptions by Experian in regard to the sourcing of on-line food purchases (i.e. the proportion which is actually supplied from the shelves of stores vs. deliveries from non-retail distribution centres to private residences).

Total Convenience Goods Expenditure (Table 2 (d))

- 3.8 Table 2d of **Appendix 1** combine population and per capita expenditure estimates to establish total available convenience expenditure respectively within the Study Area. Table 2d shows that there will be approximately £176.94m convenience goods expenditure within the Study Area at our test year in 2029. For Zone 1 at the test year, this would be £87.55m, £36.65m for Zone 2 and £52.75m for Zone 3.

Convenience Goods Shopping Patterns (£m) in 2024 and 2029 (Tables 3, 4 and 5)

- 3.9 Table 3 shows the convenience shopping patterns drawn from the household survey that was commissioned from NEMS. These are split between first choice and second choice main food shopping, followed by first and second choice top up food shopping.
- 3.10 Tables 4 and 5 undertake the conventional process of applying the total convenience goods expenditure for each Zone to the 'main', 'second choice main', 'top-up (main)', 'top-up (second choice)' convenience goods shopping patterns as established by the household telephone shopper survey. This assumes that the split between main food shopping and top-up shopping is 70%/30%, with first choice and second choice for each also split 70%/30%.
- 3.11 A number of key findings from these tables are that:
- **81.7%** (£71.6m in 2029) of the convenience goods expenditure generated by Zone 1 is retained within the area. Therefore, **18.3%** leaks elsewhere with this mainly flowing to Zone 2 or beyond the study area;
 - The primary convenience shopping destination within Zone 1 is the Tesco store within Port Talbot Town Centre, with a total turnover of **£30.6m** in 2029. Collectively, Port Talbot Town Centre has a turnover of £37.2m;
 - This is followed by the Morrisons store, located at Baglan Industrial Park with a total turnover of **£23.8m**. The Aldi store in Taibach has a turnover of **£14.6m** and the Lidl store, **£8.9m**;
 - Stores in Zone 1 draw high levels of trade from Zone 3 and some from Zone 2; and
 - We note that the Iceland store in Port Talbot Town Centre was projected to have a turnover of **£2.4m** by 2029 but understand this has now closed. This change will be reflected later in the tables.
- 3.12 Although the findings demonstrate relatively high levels of expenditure retention within Zone 1, the household survey also reveals significant levels of inflow from the surrounding area. This is consistent with the Council's retail study from 2013, the Neath Port Talbot Retail Study.
- 3.13 It is notable that our household survey only considered inflows from our Zones 2 and 3, whereas the Council study in 2013 identified further inflows from the wider Council area. We consider this to be relevant to our assessment of need.

Existing Shopping Patterns for Zone 1, Foodstore Benchmark Turnover Analysis 2024/2029 and Retail Capacity Analysis (Zone 1) (Tables 6A, 6B +6C)

- 3.14 Table 6A sets out the expenditure patterns from Zone 1 discussed above. Table 6B then examines benchmark turnovers within Zone 1, utilising floorspace information from both the Neath Port Talbot Retail Study (2013) and a more recent planning application, P2017/0516, comprising the Retail Assessment (May 2017) and Retail Assessment Addendum Report (July 2017).
- 3.15 These net floorspace figures are then multiplied by the convenience and comparison split set out in Global Data 2023, to provide a net convenience floorspace. The benchmark sales density figures are recalculated to a 2022 price year and then multiplied by the floorspace to provide an expected benchmark turnover level for 2024 and 2029.

- 3.16 This demonstrates that in 2024, the expected benchmark turnover level within Zone 1 is £88.71m, with this growing to £89.57m by 2029. This calculation adopts the sales density growth figures set in Figures 4a of Experian Planner Briefing Note 21 (Feb 2024).
- 3.17 Table 6C considers retail capacity within Zone 1. The contents are drawn from the previous tables to consider the level of expenditure retention and inflow into the area. Noting that the area covered by our household survey was less extensive than for the Council's 2013 Retail Study, a conservative assumption of an additional 6% inflow has been assumed. We note that the Council's 2013 Study assumed 5% (ref. Table 9c of Appendix C) but this figure related to expenditure outwith the Council area only. It is clear from that report that there is inflow from other parts of the Council area beyond our Zones 1-3.
- 3.18 We consider these conclusions to be robust particularly given the additional evidence from the more recent Bridgend Retail Study Update (May 2022), which identified in Table 4 of that report, that there was approximately £18.9m of convenience expenditure flowing into Port Talbot from the Bridgend Council area. We are therefore confident that the assumptions we have adopted are conservative and in reality, the inflow beyond Zones 1-3 of our assessment would more than likely be greater than the 6% adopted.
- 3.19 In total, we assume that the turnover of stores within Zone 1 is £101.3m in 2024, growing to £101.6m in 2029. Once benchmark turnovers are removed, this leaves residual capacity of £12.6m in 2024 and £12m in 2029.
- 3.20 Although this figure is just less than the proposed turnover of the Aldi store at Afan Way, we note that there is no policy requirement to demonstrate 100% capacity within an area. We note that this was the position accepted by the Council in their decision to support an Iceland: Food Warehouse under ref. P2017/0516 and previously an ASDA store at Ystalyfera.
- 3.21 Finally, we also consider there to be a range of qualitative need considerations as set out within the original Statement, that are also of relevance to the assessment against policy. Please refer to our original Statement for more details.

Anticipated Convenience Trade Draw to Aldi Development and Solus Retail Impact (Tables 7, 8+9)

- 3.22 The proposal's convenience goods trade allocation / diversion is set out at Tables 7 and 8 of **Appendix 1**. Given similar guidance does not exist in Wales, reference has been had to the Practice Guidance for England; which states that a common starting point for the exercise is to consider the catchment's existing shopping patterns (in this case provided by the NEMS household survey) and to then apportion the trade to be diverted based upon the character of development ('like affecting like'), popularity (based upon existing shopping patterns / Avison Young observations), geographic location (proximity) and brand loyalty factors (i.e. are catchment residents already using Aldi).
- 3.23 With the recent closure of the Iceland store in Port Talbot Town Centre and M+S store in Neath, post-dating the household survey, adjustments have been made to turnovers. For the Iceland store, we have considered the nature of that offer, which we anticipate would have mainly been serving visitors to the town centre, who potentially may not have had access to a car. We have therefore assumed that the majority of that turnover will divert to other retailers in Port Talbot Town Centre, with 30% allocated each to the Tesco, B+M and Home Bargains stores. We have also assumed 10% of the turnover would divert to the Iceland Food Warehouse located at Christchurch Road.
- 3.24 For M+S Neath, the following assumptions were made. 40% of this trade was diverted to the Morrisons store in Neath Town Centre, 30% to local shops in the town centre and 30% to the nearest

M+S store nearby, in Swansea. We consider this to be reasonable as we expect brand loyalty to play a greater role in the transfer of expenditure than for the Iceland store.

- 3.25 Beyond the above amendments, the trade draw within Tables 7 and 8 matches the original Statement (dated May 2024). with 80% expected to be drawn from Zone 1, 5% from Zone 2 and 15% from Zone 3. This is clearly a matter of professional judgement and for the purposes of consistency have retained our expectations for trade draw to be the same as within the original report.
- 3.26 As the application proposals are centred around a 'main' food shopping destination (a discount foodstore), it stands to reason that the scheme will divert the vast majority of its trade from equivalent 'main' food shopping destinations (i.e. medium / large mainstream foodstores and discount foodstores). This assumption is entirely consistent with the approach advocated within the English Planning Practice Guidance (see PPG Para Ref. 2b-015-20190722) given there is no comparable guidance within the Welsh planning system.
- 3.27 Given this advice, our approach has been to have greatest regard to the existing 'main' food shopping patterns in the catchment area when allocating the trade diversion of the scheme. We do not propose to provide an exhaustive list of all monetary diversions within this supporting statement as they are clearly outlined in Tables 8 and 9 of **Appendix 1**. However, we do provide a commentary on the stores / centres from which the majority of the scheme's trade will be diverted below.
- 3.28 The detailed trade allocation and impact tables (Tables 8 +9 of the Addendum) shows that the majority of trade would be drawn from the Tesco store in Port Talbot. This is predicted to be 25.2% of the Aldi turnover, amounting to £3.03m and resulting in a 9.7% trade impact. This figure is considered reasonable given the proximity to the site and nature of the competing offer. It is worth noting that this store is currently overtrading, with a turnover of £31.28m compared to an expected benchmark turnover of £21.86m. This was 143% of the benchmark level (+£9.42m). The resulting diversion would only comprise 32% of this overtrading and as a result, would have no long-term effect on the vitality of this location.
- 3.29 Only minor diversions are expected from elsewhere in Port Talbot Town Centre given the provision and little cross-over with an Aldi foodstore. Overall, it is anticipated that the Town Centre will experience an 8.5% impact and it is clear that this is not significantly adverse.
- 3.30 Diversions are also expected to come from the Aldi store at Taibach, which was also found to be overtrading. The store has a turnover of £14.63m compared to an expected turnover of £8.96m, which is 163% of average UK levels. 16.7% of the proposed new store's turnover is expected to be diverted from this location, which equates to £2.01m and again represents a modest percentage of the overtrading. Whilst the impact figure on the centre overall is expected to be 12.9%, this derives solely from the overtrading Aldi store, and it is apparent that post-development the store and wider centre will continue to perform well above average levels into the future.
- 3.31 Other significant diversions are expected from the Morrisons and Lidl stores at Baglan, given their comparability to the proposed offer. This includes trade diversions of £1.81m and £1.71m respectively, resulting in projected impacts of 7.6% and 19.2%. Both of these stores are located in out of centre locations and so not protected by planning policy. Notwithstanding, it is not anticipated that either of these diversions would have significant effects on the ongoing operation of these stores.
- 3.32 Other minor diversions are expected to come from the Iceland Food Warehouse at Baglan, Coop at Cwmavon, the Morrisons and Lidl stores in Neath and ASDA store in Pyle. It is also projected that diversions will come from reclaiming lost trade to stores beyond the Study area, focused principally on the Aldi stores in Neath and Maesteg, in addition to the Tesco store in Swansea. We consider this to be likely given their current attraction for Zone 1 shoppers and because we consider that a new,

modern and larger Aldi store would encourage shoppers to divert their current weekly patterns to the new location.

Table 1: Solus Impacts on Defined Centres in Study Area

In-Centre Facilities	Pre-Development Turnover (£m)	Pre-Development Performance v. benchmark (%)	Post-Development Turnover (£m)	Post-Development Performance v. benchmark (%)
Port Talbot Town Centre	£36.96m	142%	£33.83m	130%
Taibach / Commercial Road District Centre	£15.63m	141%	£13.61m	122%
Cwmavon Local Centre	£3.77m	115%	£3.53m	108%

- 3.33 As can be seen from the above figures, although some of the diversions would come from defined centres, on the whole these centres are performing above benchmark levels based on the findings of the household survey. Evidence of their health and relative vitality and viability was also backed up by the findings of the healthchecks undertaken in June 2023.
- 3.34 Any diversions must therefore be viewed in that context, and it is clear from the impact assessment that they would not be at a level to have a significant adverse impact on any defined centre.

Summary

- 3.35 The updates made to the retail impact assessment enclosed within this Addendum, ultimately further support the case for the planning application proposals in the following way:
- With the incorporation of a revised retail sales area for the proposed foodstore, it is even more apparent that the retail case for the development remains strong.
 - The closure of the Iceland store in Port Talbot Town Centre and M+S store in Neath, whilst disappointing, would result in that consumer expenditure principally being spent in other retailers in each centre, further boosting their turnovers.
 - The findings of the household survey reveal that there is overtrading occurring within Zone 1 and as a result, a need for more and better-quality choice in food shopping provision. Indeed, we consider that there is likely to be even further expenditure inflows into Zone 1, not captured by the household survey, based on both the findings of the Council's 2013 Retail Study and the Bridgend Retail Study Update (May 2022). This would, in effect, further increase the level of need present.
 - Significantly, the proposed development would only have minor solus impacts on established centres, particularly given that these are currently trading well above benchmark levels. The levels of impact on defined centres would therefore not be significantly adverse, thereby complying with national and local planning policies. This is particularly the case given that Port

Talbot Town Centre is also supported by comparison retail uses, which would be largely unaffected by the development proposals.

- 3.36 Drawing the above points together, it is clear that the trading effects of the retail proposal will give rise to only minor retail impacts across the majority of surrounding foodstores and centres, which can be accommodated without negative long-term implications. The proposals therefore comply with both local and national planning policy tests.

4. Response to representation

- 4.1 This section will more directly respond to the letter prepared by Peacock and Smith (P&S) on behalf of their client, WM Morrison Supermarkets plc (Morrison's), dated 9 October 2024. We take each of their points in turn.

Point 1: Current Proposal and Relevant Planning History.

- Response – We have no further comment to make in regard to their statements.

Point 2: Retail Need Test – The letter comments on the extent of Zone 1.

- Response - This area was selected given the findings of the Council's Neath Port Talbot Retail Study 2013, as identified by Appendix A of that report, with the area matching Zone 2 of that retail study as being the catchment area for Port Talbot. This was considered a reasonable approach given the location of the proposal, centrally within the town and as the majority of population within Port Talbot (and within our primary catchment) would be captured.

We consider it highly unlikely that the need case would be affected by the inclusion of postal sector SA12 9, given the small level of population located within the area. Moreover, its inclusion and expenditure that the household survey identified being spent in Port Talbot would have been captured through expenditure inflow and would have continued to represent a sign of retail need.

The additional table enclosed within this Addendum (Table 6C) clearly demonstrates that there is a level of retail need present in the catchment area.

We also note that the letter focuses specifically on quantitative need and does not consider the evidence of qualitative need that we set out within our original Planning and Retail Statement from paragraph 7.23 onwards.

We therefore disagree with their conclusion that a need for the development has not been satisfactorily demonstrated.

Point 3: Sequential Test – Potential Alternative Sites

- Response – Firstly, we note the acceptance by P&S that the 4 sites we assessed within our sequential assessment were not suitable. We welcome this acknowledgement and review the additional sites they have highlighted below.

Site 5 – Bethany Square / Station Road Car Parks – The letter suggests that this site could be sequentially preferable. As no map has been provided it is difficult to be 100% certain of the area that P&S believe may be available and suitable for development. #

The letter references two car parks, alongside further commentary on a two-storey office building and two churches. All of these buildings are occupied, it is worth noting. If the area P+S believe may be sequentially preferable includes those buildings, it is clear that the site is not available for development and given the range of occupiers, it is highly unlikely that it could be made available in a realistic timeframe. The 1.05ha site area reference in the letter suggests that the principal site they refer to is the two car parks. The letter fails to acknowledge that this area includes an important roundabout which sits between the two

sites, and which is the only access point for reaching the most northerly church and the servicing area for the Aberafan Shopping Centre. As this piece of infrastructure splits the two sites, it would be very challenging to create a development site for the foodstore and drive thru, alongside maintaining this key access route for the uses described earlier.

As a result, we conclude that the site is not sequentially preferable as it is neither available or suitable.

Site 6 – Existing Aldi store and adjacent land to the west and east, Commercial Road (Taibach) District Centre

The second site referred to comprises the Aldi store at Taibach, together with the local Fire Service station and a WM Glazing building. This site is clearly not available though for a new foodstore and drive thru development given the range of uses currently present. Aldi do not intend to close their Taibach store and so the site is plainly not available.

We therefore conclude that the site is not available for the development proposals.

Point 4: Retail Impact

- We note the alternative retail impact scenario put forward by P&S. We do not agree with its conclusions and standby our assumptions for trade diversions and projected impacts described earlier and set out within Tables 8 and 9 of the retail impact assessment.

Moreover, it is important to restate the figures presented within the retail impact assessment relate to convenience goods only. Port Talbot is a significant comparison goods retailing destination, which had a non-food total turnover of £48.1m in 2012 (according to the NPTRS). In light of this and if considered as part of the overall impact calculations, it is even more clear that the proposals would not have a significant adverse impact on the vitality or viability of Port Talbot Town Centre, or on Taibach/Commercial Road District Centre.

5. Conclusions

- 5.1 This Addendum report has been prepared in support of planning application (P2024/0339) proposing to deliver a new discount foodstore and coffee shop (with drive thru) in Port Talbot.
- 5.2 It has been prepared to respond to comments within a letter of representation by WM Morrison Supermarkets plc and to update on certain matters relating to the proposal's retail sales floorspace and reflect changes in shopping provision since the household survey was undertaken. It should be read alongside the original Planning and Retail Statement (May 2024), which respectively covers wider retail planning policy topics relating to the sequential assessment, town centre healthchecks and impacts on planned investment.
- 5.3 Based on the assessment enclosed, our overall conclusions are that:
- The updates enclosed to the retail impact assessment do not alter the overall conclusions of the original report and in many ways reinforce those findings;
 - The introduction of an Aldi discount foodstore in central Port Talbot will play an important role in improving the shopping offer locally, in an area of identified quantitative and qualitative need;
 - Although it is acknowledged that there will be some trade diversions from defined retail centres, including the Tesco store in Port Talbot Town Centre and Aldi store in Taibach, both of these stores were found to be trading significantly above benchmark levels;
 - In light of the impact assessment and final table showing overtrading percentages (Table 10) it is apparent that the application proposals will not have any significant adverse impact on any policy protected centres in the catchment area;
 - Indeed it is considered that there could instead be increased linked trips with Port Talbot Town Centre, as a result of the development, further supporting its vitality and viability through the retention of localised shopping and leisure trips;
 - As the proposals are located within an area that suffers from levels of deprivation, the proposals can offer high quality and affordable goods in a walkable location, where they can greatly benefit the local community;
 - The introduction of Aldi at the site will reduce health inequality within the surrounding local catchment area, by providing straightforward access to a wide range of fresh produce and healthy food at heavily discounted prices in a time of high-consumer demand and general price inflation; and
 - The application proposals therefore fully comply with national planning policies set out in PPW alongside local policies relating to retail matters.

Appendix 1

Retail Impact Assessment Tables – Update

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 1. TURNOVER OF PROPOSED DEVELOPMENT

Proposed new Aldi foodstore, Land North of Afan Way, Aberavon, Port Talbot		Gross Floorspace (sq. m)	Net Floorspace (sq. m)	Turnover per sq. m in 2024 (£m)	Period to Test Year					
					2024	2025	2026	2027	2028	2029
Aldi Foodstore	Convenience	2,000	923	£12,961	£11.97	£11.97	£11.99	£12.01	£12.04	£12.06
	Comparison		231	£5,136	£1.19	£1.20	£1.23	£1.27	£1.30	£1.33
	Total		1,154	-	£13.15	£13.17	£13.22	£13.28	£13.34	£13.39
Notes: a. Gross floorspace of proposed Aldi foodstore sourced from architectural drawings b. Net sales area and convenience goods / comparison goods floorspace split of Aldi provided by operator c. Sales density for Aldi Stores Ltd derived from GlobalData 'Convenience and Comparison Goods Sales Densities of Major Grocers' (2023 Edition), published December 2023. Then converted to a 2022 price year using price indices set out in Experian Retail Planner Briefing Note 21 (Feb 2024) - Appendix 4b. d. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b (Page 15) of Experian Retail Planner Briefing Note 21 (February 2024) 2022 Prices										

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 2(a): POPULATION WITHIN EACH ZONE

ZONE	2022	2023	2024	2025	2026	2027	2028	2029
Zone 1	-	-	39,017	39,136	39,263	39,368	39,461	39,560
Zone 2	-	-	16,112	16,155	16,237	16,279	16,323	16,359
Zone 3	-	-	23,515	23,360	23,735	23,834	23,931	24,023
TOTAL	-	-	78,644	78,651	79,235	79,481	79,715	79,942
Notes: a. Postcode sectors SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1 represent Zone 1. Study Area includes postcode sectors SA11 1 and SA11 2 (Zone 2), and CF33 4, CF33 6 and SA13 2 (Zone 3). b. Base population derived from Experian Location Analyst data (May 2024 Report) c. Base year taken as 2024 and test/design year as 2029								

TABLE 2(b): PER CAPITA CONVENIENCE EXPENDITURE WITHIN STUDY AREA (EXCLUDING NON STORE RETAIL TRADE DEDUCTION)

ZONE	2022	2023	2024	2025	2026	2027	2028	2029
Zone 1	£2,452	£2,378	£2,367	£2,362	£2,359	£2,359	£2,359	£2,362
Zone 2	£2,482	£2,408	£2,396	£2,391	£2,388	£2,388	£2,388	£2,391
Zone 3	£2,433	£2,360	£2,348	£2,344	£2,341	£2,341	£2,341	£2,344
ANNUAL GROWTH	-	-3.0%	-0.5%	-0.2%	-0.1%	0.0%	0.0%	0.1%
Notes: a. Per capita expenditure derived from Experian Location Analyst data (May 2024 Report) b. Expenditure growth taken from Figure 7 of Experian Retail Planner Briefing Note 21 (Feb 2024) 2022 Prices								

TABLE 2(c): PER CAPITA CONVENIENCE EXPENDITURE WITHIN STUDY AREA (INCLUDING NON STORE RETAIL TRADE DEDUCTION)

ZONE	2022	2023	2024	2025	2026	2027	2028	2029
Zone 1	£2,332	£2,267	£2,243	£2,230	£2,223	£2,218	£2,213	£2,213
Zone 2	£2,360	£2,294	£2,271	£2,257	£2,250	£2,245	£2,240	£2,240
Zone 3	£2,314	£2,249	£2,226	£2,212	£2,205	£2,201	£2,196	£2,196
ANNUAL DEDUCTION	4.9%	4.7%	5.2%	5.6%	5.8%	6.0%	6.2%	6.3%
Notes: a. Per capita expenditure derived from Experian Location Analyst data (May 2024 Report) b. Expenditure excludes Non Store Retail Trade in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 22 (Feb 2024) 2022 Prices								

TABLE 2(d): TOTAL CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA

ZONE	2022	2023	2024	2025	2026	2027	2028	2029
Zone 1	-	-	£87.53	£87.26	£87.27	£87.31	£87.33	£87.55
Zone 2	-	-	£36.59	£36.46	£36.53	£36.55	£36.57	£36.65
Zone 3	-	-	£52.35	£51.68	£52.34	£52.45	£52.55	£52.75
TOTAL	-	-	£176.47	£175.39	£176.14	£176.31	£176.45	£176.94
Notes: a. Total available expenditure (2(d)) calculated by multiplying population from Table 2(a) by expenditure per head (minus NSRT deduction) from Table 2(c) 2022 Prices								

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 3: CONVENIENCE GOODS SHOPPING PATTERNS (%)

STORE/ CENTRE	FIRST CHOICE MAIN FOOD SHOPPING			SECOND CHOICE MAIN FOOD SHOPPING			FIRST CHOICE TOP UP FOOD SHOPPING			SECOND CHOICE TOP UP FOOD SHOPPING		
	Zone 1	Zone 2	Zone 3	Zone 1	Zone 2	Zone 3	Zone 1	Zone 2	Zone 3	Zone 1	Zone 2	Zone 3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)												
Port Talbot Town Centre												
S&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.73%	0.00%	0.00%	0.76%	0.00%	0.00%	0.26%	0.00%	1.53%	1.86%	0.00%	0.00%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.47%	2.75%	5.98%	4.63%	2.77%	4.71%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.66%	0.00%	0.00%	0.00%	0.00%	0.31%	0.78%	0.00%	0.00%	0.81%	0.00%	1.57%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	28.87%	3.03%	12.48%	29.90%	3.10%	12.32%	20.72%	0.78%	10.41%	19.85%	3.56%	12.93%
Local shops, Port Talbot Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.52%	0.78%	2.58%	8.79%	1.57%	0.00%
Commercial Road District Centre												
Aldi, Commercial Road, Port Talbot, SA13 1LG	14.51%	2.19%	7.91%	13.08%	2.24%	9.81%	4.07%	0.00%	8.41%	4.22%	0.00%	6.25%
Local shops, Talbach local 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%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.00%	0.00%	1.51%	0.00%	0.00%	1.50%	0.92%	0.00%	1.53%	0.96%	0.00%	0.41%
Fairway Sandfields, Local Centre												
Costcutter, Fairway, Port Talbot, SA12 7HR	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.01%	0.00%	0.00%	1.05%	0.00%	0.00%
Pentwyn Baglan Road, Baglan, Local Centre												
Local shops, Baglan village centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.28%	0.00%	0.00%	2.16%	0.00%	0.00%
Cwmavon, Local Centre												
Co-Op Food, Heol Iwibill, Cwmavon, Port Talbot, SA12 9NR	0.73%	0.00%	0.00%	0.76%	0.00%	0.00%	11.52%	0.00%	0.00%	11.93%	0.00%	0.00%
Local shops, Cwmavon village centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%	0.00%	1.23%	0.00%	0.00%
Out of Centre												
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	2.83%	0.55%	1.40%	2.36%	2.23%	0.00%	3.95%	0.00%	1.40%	6.12%	0.00%	1.44%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	8.14%	2.74%	3.13%	10.25%	1.12%	3.99%	4.94%	3.53%	1.40%	4.02%	0.00%	1.44%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	23.80%	6.02%	10.30%	23.14%	5.59%	11.74%	10.76%	4.67%	4.11%	11.03%	3.13%	3.06%
Other	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.87%	0.78%	0.40%	7.03%	0.00%	1.62%
Zone 1 TOTAL	80.26%	14.52%	36.73%	80.24%	14.28%	39.67%	84.98%	13.29%	37.75%	85.66%	11.03%	33.41%
Zone 2 (SA11 1 and SA11 2)												
Neath Town Centre												
Local shops, Neath Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.67%	0.00%	0.00%	6.96%	0.00%
Morrisons, Angel Street, Neath, SA11 1RS	1.23%	20.93%	0.00%	1.86%	21.57%	0.00%	1.44%	9.34%	0.00%	2.31%	9.41%	0.00%
M&S Green Street East Street 16, Neath SA11 1DH	0.38%	0.55%	0.00%	0.00%	2.24%	0.00%	1.18%	10.16%	0.00%	0.96%	14.59%	0.00%
Briton Ferry Town Centre/Neath Road District Centre												
Local shops, Briton Ferry Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.13%	0.00%	0.00%	5.39%	0.00%
Out of Centre												
Lidl, Briton Ferry Road, Neath, SA11 1AS	1.04%	9.53%	1.10%	1.47%	10.85%	1.09%	0.78%	12.36%	0.00%	1.08%	11.67%	0.00%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.56%	2.12%	0.00%	0.39%	0.00%	0.00%	1.27%	7.00%	0.00%	0.54%	8.63%	0.00%
Zone 2 TOTAL	3.20%	33.13%	1.10%	3.72%	34.66%	1.09%	4.68%	49.66%	0.00%	4.88%	56.64%	0.00%
Zone 3 (CF33 4, CF33 6 and SA13 2)												
Pyle District Centre												
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.66%	0.00%	29.69%	0.20%	0.00%	31.40%	0.26%	0.00%	23.64%	0.27%	0.00%	21.07%
Local shops, Pyle	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.72%	0.00%	0.00%	3.82%
Kenfig Hill District Centre												
Local shops, Kenfig Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.36%	0.00%	0.00%	7.56%
Margam Local Centre												
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.77%	0.00%	0.00%	6.47%
Local shops, Margam local 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%
North Cornelly Local Service Centre												
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.79%	0.00%	0.00%	1.84%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.00%	0.00%	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	3.51%	0.00%	0.00%	3.60%
Local shops, North Cornelly	0.00%	0.00%	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	5.69%	0.00%	0.00%	5.44%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.00%	0.00%	1.10%	0.00%	0.00%	0.00%	0.00%	0.00%	6.70%	0.00%	0.00%	6.87%
Zone 3 TOTAL	0.66%	0.00%	30.79%	0.20%	0.00%	32.02%	0.26%	0.00%	57.17%	0.27%	0.00%	56.66%
OUTSIDE STUDY AREA												
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.00%	0.00%	2.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.56%	0.00%	0.93%	0.00%	0.00%	0.83%	0.00%	0.00%	0.00%	0.81%	0.00%	0.00%
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.67%	8.75%	0.00%	1.54%	5.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.00%	0.00%	2.13%	0.00%	0.00%	2.43%	0.00%	0.00%	0.40%	0.00%	0.00%	1.98%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.00%	0.00%	1.72%	0.00%	0.00%	1.71%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Old Market Street, Neath, SA11 3NA	0.00%	0.00%	0.00%	0.00%	2.54%	0.00%	0.00%	7.32%	0.00%	0.00%	4.34%	0.00%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.85%	0.55%	0.00%	1.34%	2.79%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	0.00%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.00%	0.00%	0.62%	0.00%	0.00%	1.20%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%	5.35%	0.00%	0.81%	3.04%	0.00%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	9.38%	0.00%	0.27%	5.91%	0.00%
Tesco Extra, Nantyrffin North, Swansea Enterprise Park, Swansea, SA7 9RF	4.10%	5.22%	2.17%	3.49%	3.66%	1.85%	0.00%	0.00%	0.00%	1.05%	0.79%	0.00%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.00%	0.00%	0.31%	0.00%	0.56%	0.00%	0.78%	0.00%	1.53%	0.00%	0.00%	3.14%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.50%	26.57%	0.00%	0.78%	23.31%	0.00%	1.56%	1.56%	0.00%	0.81%	1.57%	0.00%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.00%	0.00%	5.09%	0.76%	0.00%	5.06%	0.00%	0.00%	1.18%	0.00%	0.00%	2.43%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.00%	0.00%	1.20%	0.20%	0.00%	2.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.00%	4.96%	4.47%	0.69%	5.06%	2.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	0.00%	0.00%	3.06%	0.00%	0.00%	1.54%	0.00%	0.00%	0.00%	0.00%	0.00%	1.57%
Local shops, Bridgend Town Centre	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.00%	1.18%	0.00%	0.00%	0.00%
Local shops, Maesteg Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%	0.40%	0.96%	0.00%	0.41%
Local shops, Swansea City Centre	0.19%	0.00%	0.00%	0.20%	0.00%	0.00%	1.04%	3.53%	0.00%	0.27%	2.77%	0.00%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.66%	0.00%	1.40%	0.59%	0.00%	1.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Upper Forest Way, Llansamlet, Swansea SA6 8PS	0.94%	1.64%	0.00%	1.47%	1.67%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
OKs Supermarket, Cimla Rd, Neath SA11 3UG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.14%	0.00%	0.00%	11.56%	0.00%
Home Bargains, Market St, Bridgend CF31 1LL	0.00%	0.00%	0.31%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Brackla St, Bridgend CF31 1DD	0.00%	0.00%	1.10%	0.00%	0.00%	1.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Local shops, Porthcawl	0.00%	0.00%	2.13%	0.00%	0.00%	2.12%	0.00%	0.00%	0.40%	0.00%	0.00%	0.41%
M&S Foodhall, Pontardulais Rd, Cadle, Florest-fach, Swansea SA5 4BA	0.56%	0.00%	0.00%	0.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6VZ	0.85%	0.00%	0.00%	0.88%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's, Quay Parade, Swansea SA1 8JA	2.08%	4.67%	0.93%	2.55%	4.21%	0.92%	1.18%	0.00%	0.00%	1.22%	0.79%	0.00%
Tesco Extra, Pontardulais Rd, Cadle, Florest-fach, Swansea SA5 4BA	0.92%	0.00%	0.00%	0.20%	0.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.00%	0.00%	1.10%	0.00%	0.00%	1.09%	0.92%	0.00%	0.00%	0.96%	0.00%	0.00%
Other	0.00%	0.00%	0.00%	0.59%	1.12%	0.31%	1.96%	0.78%	0.00%	2.03%	0.79%	0.00%
OUTSIDE STUDY AREA - TOTAL	15.87%	52.36%	31.38%	15.84%	51.07%	27.22%	10.08%	37.06%	5.09%	9.18%	32.33%	9.94%
Note												
Market shares taken from 2023 household survey. Only most popular stores shown under the sub-headings for each main location.												

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 4: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2024

	FIRST CHOICE MAIN FOOD SHOPPING				SECOND CHOICE MAIN FOOD SHOPPING				FIRST CHOICE TOP UP FOOD SHOPPING				SECOND CHOICE TOP UP FOOD SHOPPING				
STORE/CENTRE				TOTAL				TOTAL				TOTAL				TOTAL	TOTAL
	Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)	87.5	36.6	52.3	176.5	87.5	36.6	52.3	176.5	87.5	36.6	52.3	176.5	87.5	36.6	52.3	176.5	
	44.2	18.0	28.3	90.5	18.9	7.7	12.1	38.8	17.1	7.7	8.3	33.1	7.3	3.3	3.6	14.2	
Port Talbot Town Centre	£13.4	£0.5	£3.5	£17.4	£5.8	£0.2	£1.5	£7.6	£6.1	£0.3	£1.7	£8.1	£2.6	£0.3	£0.7	£3.6	
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.3	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.2	£0.1	£0.0	£0.0	£0.3	
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.2	£0.5	1.5	£0.3	£0.1	£0.2	£0.6	
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	0.1	£0.1	£0.0	£0.1	£0.2	
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£12.8	£0.5	£3.5	£16.8	£5.7	£0.2	£1.5	£7.4	£3.5	£0.1	£0.9	4.5	£1.5	£0.1	£0.5	£2.0	
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£0.2	1.9	£0.6	£0.1	£0.0	£0.7	
Commercial Road District Centre																	
Aldi, Commercial Road, Port Talbot, SA13 1UG	£6.4	£0.4	£2.2	£9.0	£2.5	£0.2	£1.2	£3.8	£0.7	£0.0	£0.7	1.4	£0.3	£0.0	£0.2	£0.5	
Local shops, Tabach local centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	0.0	£0.0	£0.0	£0.0	£0.0	
Fico, 2-16 Commercial Rd, Port Talbot SA13 1UG	£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.2	£0.2	£0.2	£0.0	£0.1	0.3	£0.1	£0.0	£0.0	£0.1	
Fairway Sandfields, Local Centre																	
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	0.2	£0.1	£0.0	£0.0	£0.1	
Pentwyn Baglan Road, Baglan, Local Centre																	
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	0.7	£0.2	£0.0	£0.0	£0.2	
Cwmavon, Local Centre																	
Co-Op Food, Heol Jiwili, Cwmavon, Port Talbot, SA12 9NR	£0.3	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.1	£2.0	£0.0	£0.0	2.0	£0.9	£0.0	£0.0	£0.9	
Local shops, Cwmavon village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	0.2	£0.1	£0.0	£0.0	£0.1	
Out of Centre																	
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7B2	£1.2	£0.1	£0.4	£1.7	£0.4	£0.2	£0.0	£0.6	£0.7	£0.0	£0.1	0.8	£0.4	£0.0	£0.1	£0.5	
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7B2	£3.6	£0.5	£0.9	£5.0	£1.9	£0.1	£0.5	£2.5	£0.8	£0.3	£0.1	1.2	£0.3	£0.0	£0.1	£0.3	
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7B2	£10.5	£1.1	£2.9	£14.5	£4.4	£0.4	£1.4	£6.2	£1.8	£0.4	£0.3	2.5	£0.8	£0.1	£0.1	£1.0	
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.1	£0.0	£1.3	£0.5	£0.0	£0.1	£0.6	
Zone 1 TOTAL	£35.5	£2.6	£10.4	£48.5	£15.2	£1.1	£4.8	£21.1	£14.5	£1.0	£3.1	£18.7	£6.3	£0.4	£1.2	£7.8	
Zone 2 (SA11 1 and SA11 2)																	
Neath Town Centre																	
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	0.4	£0.0	£0.2	£0.0	£0.2	
Morrisons, Angel Street, Neath, SA11 1RS	£0.5	£3.8	£0.0	£4.3	£0.4	£1.7	£0.0	£2.0	£0.2	£0.7	£0.0	1.0	£0.2	£0.3	£0.0	£0.5	
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.3	£0.0	£0.2	£0.0	£0.2	£0.2	£0.8	£0.0	1.0	£0.1	£0.5	£0.0	£0.5	
Briton Ferry Town Centre/Neath Road District Centre																	
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	0.5	£0.0	£0.2	£0.0	£0.2	
Out of Centre																	
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.5	£1.7	£0.3	£2.5	£0.3	£0.8	£0.1	£1.2	£0.1	£0.9	£0.0	1.1	£0.1	£0.4	£0.0	£0.5	
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.2	£0.4	£0.0	£0.6	£0.1	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	0.8	£0.0	£0.3	£0.0	£0.3	
Zone 2 TOTAL	£1.4	£5.9	£0.3	£7.7	£0.7	£2.7	£0.1	£3.5	£0.8	£3.8	£0.0	£4.6	£0.4	£1.9	£0.0	£2.2	
Zone 3 (CF33 4, CF33 6 and SA13 2)																	
Pyle District Centre																	
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.3	£0.0	£8.4	£8.7	£0.0	£0.0	£3.8	£3.8	£0.0	£0.0	£2.0	2.0	£0.0	£0.0	£0.8	0.8	
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	0.3	£0.0	£0.0	£0.1	0.1	
Kenfig Hill District Centre																	
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	0.6	£0.0	£0.0	£0.3	0.3	
Margam Local Centre																	
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	0.4	£0.0	£0.0	£0.2	£0.2	
Local shops, Margam local centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	0.0	£0.0	£0.0	£0.0	£0.0	
North Cornelly Local Service Centre																	
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	0.1	£0.0	£0.0	£0.1	0.1	
Fico, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	0.3	£0.0	£0.0	£0.1	0.1	
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	0.5	£0.0	£0.0	£0.2	0.2	
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	0.6	£0.0	£0.0	£0.2	0.2	
Zone 3 TOTAL	£0.3	£0.0	£8.7	£9.0	£0.0	£0.0	£3.9	£3.9	£0.0	£0.0	£4.8	4.8	£0.0	£0.0	£2.0	2.0	
BEYOND STUDY AREA																	
Aldi, Ind. Est. Brackla St, Cheapside, Bridgend CF31 1B2	£0.0	£0.0	£0.7	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.2	£0.0	£0.3	£0.5	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.7	£1.6	£0.0	£2.3	£0.3	£0.4	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Asda, Cychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Farmfoods, Penrre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.0	£0.0	£0.5	£0.5	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.6	£0.0	£0.6	£0.0	£0.1	£0.0	£0.1	
Lidl, Cadaston Rd, Cadaston, Neath SA10 7AY	£0.8	£0.1	£0.0	£0.9	£0.3	£0.2	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.0	£0.5	£0.1	£0.1	£0.0	£0.2	
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.0	£0.9	£0.0	£0.2	£0.0	£0.2	
Tesco Extra, Nantylfin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.8	£0.9	£0.6	£3.4	£0.7	£0.3	£0.2	£1.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1	£0.3	£0.0	£0.0	£0.1	£0.1	
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.7	£4.8	£0.0	£5.4	£0.1	£1.8	£0.0	£1.9	£0.3	£0.1	£0.0	£0.4	£0.1	£0.1	£0.0	£0.1	
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£1.4	£1.4	£0.1	£0.0	£0.6	£0.8	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.1	£0.1	
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.3	£0.9	£1.3	£2.5	£0.1	£0.4	£0.0	£0.5	£2.2	£0.1	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	
Lidl, Bridgend Retail Park, Uxw Tŷr Dŷr, Bridgend CF31 3UG	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	
Local shops, Swansea City Centre	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3	£0.0	£0.4	£0.0	£0.1	£0.0	£0.1	
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.3	£0.0	£0.4	£0.7	£0.1	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Asda, Upper Forest Way, Llansamlet, Swansea SA6 8PS	£0.4	£0.3	£0.0	£0.7	£0.3	£0.1	£0.0	£0.4	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
CKS Supermarket, Cimla Rd, Neath SA11 3UG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.7	£0.0	£0.4	£0.0	£0.4	
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
Local shops, Porthcawl	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
M&S Foodhall, Pontardulais Rd, Cadle, Forest-fach, Swansea SA5 4BA	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.4	£0.0	£0.0	£0.4													

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2029

	FIRST CHOICE MAIN FOOD SHOPPING				SECOND CHOICE MAIN FOOD SHOPPING				FIRST CHOICE TOP UP FOOD SHOPPING				SECOND CHOICE TOP UP FOOD SHOPPING				
				TOTAL				TOTAL				TOTAL				TOTAL	
STORE/CENTRE	Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		Zone 1	Zone 2	Zone 3		
(£m)	87.5	36.6	52.8	176.9	87.5	36.6	52.8	176.9	87.5	36.6	52.8	176.9	87.5	36.6	52.8	176.9	
(£m)	42.9	18.0	25.8	86.7	18.4	7.7	11.1	37.2	18.4	7.7	11.1	37.2	7.9	3.3	4.7	15.9	
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)																	
Port Talbot Town Centre	£13.0	£0.5	£3.2	£16.7	£5.6	£0.2	£1.4	£7.3	£6.6	£0.3	£2.3	£9.2	£2.8	£0.3	£0.9	£4.0	£37.2
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.3	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2	£0.2	£0.1	£0.0	£0.0	£0.1	£0.8
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.2	£0.7	£1.7	£0.4	£0.1	£0.2	£0.7	£2.4
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.1	£0.6
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£12.4	£0.5	£3.2	£16.2	£5.5	£0.2	£1.4	£7.1	£3.8	£0.1	£1.2	£5.0	£1.6	£0.1	£0.6	£2.3	£30.6
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.1	£0.3	£2.1	£0.7	£0.1	£0.0	£0.7	£2.8
Commercial Road District Centre																	
Aldi, Commercial Road, Port Talbot, SA13 1UG	£6.2	£0.4	£2.0	£8.7	£2.4	£0.2	£1.1	£3.7	£0.7	£0.0	£0.9	£1.7	£0.3	£0.0	£0.3	£0.6	£14.6
Local shops, Talbach local centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1UG	£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.2	£0.2	£0.2	£0.0	£0.2	£0.3	£0.1	£0.0	£0.0	£0.1	£1.0
Fairway Sandfields, Local Centre																	
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£0.3
Pentwyn Baglan Road, Baglan, Local Centre																	
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.8	£0.2	£0.0	£0.0	£0.2	£1.0
Cwmavon, Local Centre																	
Co-Op Food, Heol Jiwili, Cwmavon, Port Talbot, SA12 9NR	£0.3	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.1	£2.1	£0.0	£0.0	£2.1	£0.9	£0.0	£0.0	£0.9	£3.5
Local shops, Cwmavon village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£0.3
Out of Centre																	
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.2	£0.1	£0.4	£1.7	£0.4	£0.2	£0.0	£0.6	£0.7	£0.0	£0.2	£0.9	£0.5	£0.0	£0.1	£0.6	£3.7
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£3.5	£0.5	£0.8	£4.8	£1.9	£0.1	£0.4	£2.4	£0.9	£0.3	£0.2	£1.3	£0.3	£0.0	£0.1	£0.4	£8.9
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£10.2	£1.1	£2.7	£14.0	£4.3	£0.4	£1.3	£6.0	£2.0	£0.4	£0.5	£2.8	£0.9	£0.1	£0.1	£1.1	£23.8
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.1	£0.0	£1.4	£0.6	£0.0	£0.1	£0.6	£2.0
Zone 1 TOTAL	£34.4	£2.6	£9.5	£46.5	£14.8	£1.1	£4.4	£20.2	£15.6	£1.0	£4.2	£20.8	£6.7	£0.4	£1.6	£8.7	£96.3
Zone 2 (SA11 1 and SA11 2)																	
Neath Town Centre																	
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4	£0.0	£0.2	£0.0	£0.2	£0.6
Morrisons, Angel Street, Neath, SA11 1RS	£0.5	£3.8	£0.0	£4.3	£0.3	£1.7	£0.0	£2.0	£0.3	£0.7	£0.0	£1.0	£0.2	£0.3	£0.0	£0.5	£7.8
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.3	£0.0	£0.2	£0.0	£0.2	£0.2	£0.8	£0.0	£1.0	£0.1	£0.5	£0.0	£0.6	£2.0
Briton Ferry Town Centre/Neath Road District Centre																	
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.5	£0.0	£0.2	£0.0	£0.2	£0.6
Out of Centre																	
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.4	£1.7	£0.3	£2.4	£0.3	£0.8	£0.1	£1.2	£0.1	£1.0	£0.0	£1.1	£0.1	£0.4	£0.0	£0.5	£5.2
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.2	£0.4	£0.0	£0.6	£0.1	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	£0.8	£0.0	£0.3	£0.0	£0.3	£1.8
Zone 2 TOTAL	£1.4	£5.9	£0.3	£7.6	£0.7	£2.7	£0.1	£3.5	£0.9	£3.8	£0.0	£4.7	£0.4	£1.9	£0.0	£2.3	£18.0
Zone 3 (CF33 4, CF33 6 and SA13 2)																	
Pyle District Centre																	
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.3	£0.0	£7.7	£8.0	£0.0	£0.0	£3.5	£3.5	£0.0	£0.0	£2.6	£2.7	£0.0	£0.0	£1.0	1.0	£15.2
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.2	0.2	£0.6
Kenfig Hill District Centre																	
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.4	0.4	£1.2
Margam Local Centre																	
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5	£0.0	£0.0	£0.3	£0.3	£0.8
Local shops, Margam local centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Cornelly Local Service Centre																	
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.1	£0.1	£0.3
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.2	£0.2	£0.6
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.3	£0.3	£0.9
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7	£0.0	£0.0	£0.3	£0.3	£1.4
Zone 3 TOTAL	£0.3	£0.0	£8.0	£8.2	£0.0	£0.0	£3.5	£3.6	£0.0	£0.0	£6.3	£6.4	£0.0	£0.0	£2.7	£2.7	£20.9
BEYOND STUDY AREA																	
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.6
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.7	£1.6	£0.0	£2.3	£0.3	£0.4	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0
Asda, Coyerchurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£1.0
Farmfoods, Penrre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£0.6	£0.6	£0.0	£0.1	£0.0	£0.1	£0.9
Lidl, Cadeston Rd, Cadeston, Neath SA10 7AY	£0.8	£0.1	£0.0	£0.9	£0.2	£0.2	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.0	£0.6	£0.1	£0.1	£0.0	£0.2	£0.7
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.0	£0.9	£0.0	£0.2	£0.0	£0.2	£1.1
Tesco Extra, Nantylfin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.8	£0.9	£0.6	£3.3	£0.6	£0.3	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£4.5
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.2	£0.3	£0.0	£0.0	£0.1	£0.1	£0.6
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.6	£4.8	£0.0	£5.4	£0.1	£1.8	£0.0	£1.9	£0.3	£0.1	£0.0	£0.4	£0.1	£0.1	£0.0	£0.1	£7.9
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£1.3	£1.3	£0.1	£0.0	£0.6	£0.7	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.1	£0.1	£2.3
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£0.0	£1.7	£1.7	£0.1	£0.4	£0.3	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8
Lidl, Bridgend Retail Park, Ulys Tree Dwr, Bridgend CF31 3UG	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£1.0
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£0.3
Local shops, Swansea City Centre	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3	£0.0	£0.5	£0.0	£0.1	£0.0	£0.1	£0.7
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.1	£0.0	£0.4	£0.6	£0.1	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Asda, Upper Forest Way, Llansamlet, Swansea SA6 8PS	£0.4	£0.3	£0.0	£0.7	£0.1	£0.1	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.7	£0.0	£0.4	£0.0	£0.4	£1.1
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Local shops, Porthcawl	£0.0	£0.0	£0.6	£0.6	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
M&S Foodhall, Pontardulais Rd, Cadle, Forest-fach, Swansea SA5 4BA	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
M&S, Cophorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.9	£0.8	£0.2	£2.0	£0.5	£0.3	£0.1	£0.9	£0.2	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.1	£3.2
Tesco Extra, Pontardulais Rd, Cadle, Forest-fach, Swansea SA5 4BA	£0.4	£0.0	£0.0	£0.4	£0.0												

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 6A: EXISTING CONVENIENCE GOODS SHOPPING PATTERNS FOR ZONE 1 (£m) IN 2029

POSTCODE SECTOR	EXPENDITURE FLOW (%)	2029 (£m)
Zone 1 (retention)	81.7%	71.6
Zone 2	3.8%	3.3
Zone 3	0.4%	0.4
Beyond Study Area	14.0%	12.3
TOTAL	100%	£87.55
Note: Shopping patterns taken from Table 3. Numbers may not add due to rounding.		

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 6B: FOODSTORE BENCHMARK TURNOVER ANALYSIS 2024 + 2029

[illegible]

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 6C: RETAIL CAPACITY ANALYSIS - ZONE 1

	2024	2029
Total available convenience goods expenditure within Zone 1 (£m)	£87.53	£87.55
Turnover derived from Zone 1 residents (£m)	£71.5	£71.6
Market Share (%)	81.6%	81.7%
Expenditure inflow (£m)	£24.6	£24.7
Expenditure from outwith Study Area (£m)	£5.3	£5.3
Total Turnover (£m)	£101.3	£101.6
Benchmark Turnover (£m)	£88.7	£89.6
Residual Expenditure / Capacity (£m)	£12.6	£12.0
Notes: a. Total convenience goods expenditure taken from Table 2(d) b. Turnover derived from Z1 residents and Expenditure inflow taken from Tables 4 and 5. c. Expenditure inflow from outwith Study Area estimated at a conservative 6% of existing turnover, as informed by the Neath Port Talbot Retail Study (2013). That study used 5% however that figure considered beyond the Council area only, whereas our Study Area was smaller and did not capture some results from the wider Council area. Table 4 of that report found that Port Talbot drew some trade from Zones 4-8, which we did not survey. We expect this inflow figure to be higher based on other more recent evidence including the Bridgend Retail Study Update (May 2022). d. Benchmark Turnovers from Table 6B.		

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM

TABLE 7: ANTICIPATED CONVENIENCE TRADE DRAW TO ALDI DEVELOPMENT

ZONE	TRADE DRAW (%)	2029 (£M)
Zone 1	80%	9.6
Zone 2	5%	0.6
Zone 3	15%	1.8
Beyond Study Area	0%	0.0
TOTAL	100%	£12.06
Note: Trade draw informed by shopping patterns for primary catchment.		

TABLE 8: CONVENIENCE GOODS TRADING DRAW ALLOCATION OF ALDI PROPOSALS (£m) + CLOSURE OF ICELAND, PORT TALBOT TC + M+S NEATH

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider study area 2029	Total Convenience Turnover (from HH survey) 2029	Estimated Turnover Post-Iceland Closure 2029	Estimated Turnover Post-M+S, Neath Closure 2029	Zone 1		Zone 2		Zone 3	
	Total (£m)	Total (£m)	Total (£m)	Total (£m)	Total (£m)	(£m)	(%)	(£m)	(%)	(£m)	(%)
Zone 1											
Port Talbot Town Centre											
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.65	£0.17	£0.82	£1.53	£1.53	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB (now closed)	£1.19	£1.19	£2.37	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.49	£0.11	£0.60	£1.31	£1.31	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£23.25	£7.32	£30.57	£31.28	£31.28	£2.41	25.00%	£0.15	25.00%	£0.47	26.00%
Local shops, Port Talbot Town Centre	£2.44	£0.40	£2.84	£2.84	£2.84	£0.10	1.00%	£0.00	0.00%	£0.00	0.00%
Commercial Road District Centre											
Aldi, Commercial Road, Port Talbot, SA13 1LG	£9.71	£4.92	£14.63	£14.63	£14.63	£1.64	17.00%	£0.01	2.00%	£0.36	20.00%
Local shops, Taibach local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.24	£0.75	£0.99	£0.99	£0.99	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Fairway Sandfields, Local Centre											
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.27	£0.00	£0.27	£0.27	£0.27	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Pentwyn Baglan Road, Baglan, Local Centre											
Local shops, Baglan village centre	£0.96	£0.00	£0.96	£0.96	£0.96	£0.05	0.50%	£0.00	0.00%	£0.00	0.00%
Cwmavon, Local Centre											
Co-Op Food, Heol Jiwbilli, Cwmavon, SA12 9NR	£3.51	£0.00	£3.51	£3.51	£3.51	£0.24	2.50%	£0.00	0.00%	£0.00	0.00%
Local shops, Cwmafan village centre	£0.27	£0.00	£0.27	£0.27	£0.27	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.09	£0.00	£0.09	£0.09	£0.09	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£2.85	£0.86	£3.71	£3.95	£3.95	£0.19	2.00%	£0.01	2.00%	£0.09	5.00%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.60	£2.32	£8.92	£8.92	£8.92	£1.45	15.00%	£0.12	20.00%	£0.14	8.00%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£17.31	£6.54	£23.85	£23.85	£23.85	£1.45	15.00%	£0.09	15.00%	£0.27	15.00%
Other	£1.82	£0.18	£2.00	£2.00	£2.00	£0.14	1.50%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 1	£71.56	£24.75	£96.30	£96.30	£96.30	£7.67	79.5%	£0.39	64.0%	£1.34	74.0%
Zone 2											
Neath Town Centre											
Local shops, Neath Town Centre	£0.00	£0.59	£0.59	£0.59	£1.19	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Morrisons, Angel Street, Neath, SA11 1RS	£1.32	£6.45	£7.76	£7.76	£8.56	£0.19	2.00%	£0.03	5.00%	£0.00	0.00%
M&S Green Street East Street 16, Neath SA11 1DH (now closed)	£0.45	£1.53	£1.99	£1.99	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Briton Ferry Town Centre/Neath Road District Centre											
Local shops, Briton Ferry Town Centre	£0.00	£0.65	£0.65	£0.65	£0.65	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.94	£4.29	£5.23	£5.23	£5.23	£0.10	1.00%	£0.08	13.00%	£0.09	5.00%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.59	£1.20	£1.79	£1.79	£1.79	£0.00	0.00%	£0.01	1.00%	£0.00	0.00%
SUB-TOTAL Zone 2	£3.30	£14.71	£18.01	£18.01	£17.42	£0.29	3.00%	£0.11	19.00%	£0.09	5.00%
Zone 3											
Pyle District Centre											
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.39	£14.77	£15.16	£15.16	£15.16	£0.10	1.00%	£0.00	0.00%	£0.05	3.00%
Local shops, Pyle	£0.00	£0.59	£0.59	£0.59	£0.59	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Kenfig Hill District Centre											
Local shops, Kenfig Hill	£0.00	£1.17	£1.17	£1.17	£1.17	£0.00	0.00%	£0.00	0.00%	£0.02	1.00%
Margam Local Centre											
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.84	£0.84	£0.84	£0.84	£0.00	0.00%	£0.00	0.00%	£0.02	1.00%
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
North Cornelly Local Service Centre											
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.29	£0.29	£0.29	£0.29	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.59	£0.59	£0.59	£0.59	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, North Cornelly	£0.00	£0.92	£0.92	£0.92	£0.92	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.35	£1.35	£1.35	£1.35	£0.00	0.00%	£0.00	0.00%	£0.02	1.00%
SUB-TOTAL Zone 3	£0.39	£20.53	£20.92	£20.92	£20.92	£0.10	1.00%	£0.00	0.00%	£0.11	6.00%
BEYOND STUDY AREA											
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.62	£0.62	£0.62	£0.62	£0.00	0.00%	£0.00	0.00%	£0.04	2.00%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.30	£0.34	£0.65	£0.65	£0.65	£0.10	1.00%	£0.00	0.00%	£0.05	3.00%
Aldi, Neath Abbey Rd, Neath SA10 7BR	£1.00	£2.00	£3.00	£3.00	£3.00	£0.19	2.00%	£0.02	3.00%	£0.00	0.00%
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£0.96	£0.96	£0.96	£0.96	£0.00	0.00%	£0.00	0.00%	£0.02	1.00%
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.00	£0.63	£0.63	£0.63	£0.63	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.90	£0.90	£0.90	£0.90	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£1.04	£0.34	£1.38	£1.38	£1.38	£0.10	1.00%	£0.02	4.00%	£0.00	0.00%
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.00	£0.29	£0.29	£0.29	£0.29	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.21	£0.51	£0.72	£0.72	£0.72	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.19	£0.92	£1.11	£1.11	£1.11	£0.00	0.00%	£0.01	1.00%	£0.00	0.00%
Tesco Extra, Nantyllyn North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.48	£2.01	£4.49	£4.49	£4.49	£0.29	3.00%	£0.01	2.00%	£0.05	2.50%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.14	£0.44	£0.59	£0.59	£0.59	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£1.14	£6.74	£7.87	£7.87	£7.87	£0.19	2.00%	£0.02	3.00%	£0.00	0.00%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.14	£2.12	£2.26	£2.26	£2.26	£0.00	0.00%	£0.00	0.00%	£0.03	1.50%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.58	£0.61	£0.61	£0.61	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.13	£2.72	£2.85	£2.85	£2.85	£0.00	0.00%	£0.01	1.00%	£0.04	2.00%
Lidl, Bridgend Retail Park, Ulys Tre Dwr, Bridgend CF31 3LG	£0.00	£1.04	£1.04	£1.04	£1.04	£0.00	0.00%	£0.00	0.00%	£0.04	2.00%
Local shops, Bridgend Town Centre	£0.00	£0.21	£0.21	£0.21	£0.21	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Maesteg Town Centre	£0.24	£0.06	£0.31	£0.31	£0.31	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Swansea City Centre	£0.33	£0.36	£0.69	£0.69	£0.69	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.39	£0.52	£0.91	£0.91	£0.91	£0.00	0.00%	£0.00	0.00%	£0.02	1.00%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.67	£0.42	£1.10	£1.10	£1.10	£0.14	1.50%	£0.01	1.00%	£0.00	0.00%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.08	£1.08	£1.08	£1.08	£0.00	0.00%	£0.01	1.00%	£0.00	0.00%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.06	£0.06	£0.06	£0.06	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.11	£0.11	£0.11	£0.11	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.44	£0.44	£0.44	£0.44	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.04	£0.04	£0.04	£0.04	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Porthcawl	£0.00	£0.85	£0.85	£0.85	£0.85	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.35	£0.00	£0.35	£0.35	£0.95	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.53	£0.00	£0.53	£0.53	£0.53	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.67	£1.53	£3.20	£3.20	£3.20	£0.29	3.00%	£0.01	1.00%	£0.00	0.00%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.43	£0.04	£0.47	£0.47	£0.47	£0.19	2.00%	£0.00	0.00%	£0.00	0.00%
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.24	£0.40	£0.65	£0.65	£0.65	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Other	£0.63	£0.21	£0.84	£0.84	£0.84	£0.10	1.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Beyond Study Area	£12.30	£29.41	£41.71	£41.71	£42.31	£1.59	16.5%	£0.10	17.0%	£0.27	15.0%
OVERALL TOTAL	£87.55	£89.40	£176.94	£176.94	£176.94	£9.65	100.0%	£0.60	100.0%	£1.81	100.0%
Notes:											
a. Trade allocation of the proposal based on the primary catchment area, existing shopping patterns as informed by the Tables 3-5 and geographic location of retail provision.											
b. Turnover of Aldi store from Table 1 Aldi turnover.											
c. Assumptions made for closure of Iceland Port Talbot that 90% of trade would remain in town centre, given nature of retail offer and likelihood customers walked to the store. This has been redistributed and split 30% to Tesco, 30% to Home Bargains, 30% to B+M Bargains, and 10% of trade to Iceland Food Warehouse at Baglan.											
d. Assumptions made for closure of M+S in Neath. 40% of the trade reallocated to Morrisons store, 30% to local shops in the town centre and 30% to the nearest M+S Food in Swansea.											
2022 Prices											

TABLE 9: CONVENIENCE GOODS SOLUS TRADING IMPACT 2029 (£m)

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider Study Area 2029	Total Convenience Turnover (from Study Area) 2029	Estimated Turnover Post-Iceland Closure 2029	Estimated Turnover Post-M+S, Neath Closure 2029	SOLUS IMPACT			
						Proposed Aldi store, Afan Way			Post-Solus Impact Total Turnover (from Study Area) 2029 (£m)
	Total (£m)	Total (£m)	Total (£m)	Total (£m)	Total (£m)	(% Diversion)	(£m Diversion)	(% Trading Impact)	
Zone 1									
Port Talbot Town Centre									
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.65	£0.17	£0.82	£1.53	£1.53	0.0%	£0.00	0.0%	£1.53
Iceland, Aberafan Centre, Port Talbot, SA13 1PB (now closed)	£1.19	£1.19	£2.37	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.49	£0.11	£0.60	£1.31	£1.31	0.0%	£0.00	0.0%	£1.31
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£23.25	£7.32	£30.57	£31.28	£31.28	25.2%	£3.03	9.7%	£28.25
Local shops, Port Talbot Town Centre	£2.44	£0.40	£2.84	£2.84	£2.84	0.8%	£0.10	3.4%	£2.74
TOTAL	£28.02	£9.18	£37.20	£36.96	£36.96	26.0%	£3.1	8.5%	£33.83
Commercial Road District Centre									
Aldi, Commercial Road, Port Talbot, SA13 1LG	£9.71	£4.92	£14.63	£14.63	£14.63	16.7%	£2.01	13.8%	£12.62
Local shops, Taibach local centre	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.24	£0.75	£0.99	£0.99	£0.99	0.0%	£0.00	0.0%	£0.99
TOTAL	£9.96	£5.67	£15.63	£15.63	£15.63	16.7%	£2.0	12.9%	£13.61
Fairway Sandfields, Local Centre									
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.27	£0.00	£0.27	£0.27	£0.27	0.0%	£0.00	0.0%	£0.27
Pentwyn Baglan Road, Baglan, Local Centre									
Local shops, Baglan village centre	£0.96	£0.00	£0.96	£0.96	£0.96	0.4%	£0.05	5.0%	£0.91
Cwmavon, Local Centre									
Co-op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£3.51	£0.00	£3.51	£3.51	£3.51	2.0%	£0.24	6.9%	£3.27
Local shops, Cwmafan village centre	£0.27	£0.00	£0.27	£0.27	£0.27	0.0%	£0.00	0.0%	£0.27
TOTAL	£3.77	£0.00	£3.77	£3.77	£3.77	2.0%	£0.24	6.4%	£3.53
Out of Centre									
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£2.85	£0.86	£3.71	£3.95	£3.95	2.5%	£0.30	7.5%	£3.65
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.60	£2.32	£8.92	£8.92	£8.92	14.2%	£1.71	19.2%	£7.21
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£17.31	£6.54	£23.85	£23.85	£23.85	15.0%	£1.81	7.6%	£22.04
Other	£1.82	£0.18	£2.00	£2.00	£2.00	1.2%	£0.14	7.2%	£1.85
SUB-TOTAL ZONE 1	£71.6	£24.7	£96.3	£96.3	£96.3	77.9%	£9.40	-	£86.9
Zone 2									
Neath Town Centre									
Local shops, Neath Town Centre	£0.00	£0.59	£0.59	£0.59	£1.19	0.0%	£0.00	0.0%	£1.19
Morrisons, Angel Street, Neath, SA11 1RS	£1.32	£6.45	£7.76	£7.76	£8.56	1.9%	£0.22	2.6%	£8.33
M&S Green Street East Street 16, Neath SA11 1DH (now closed)	£0.45	£1.53	£1.99	£1.99	£0.00	0.0%	£0.00	0.0%	£0.00
TOTAL	£1.77	£8.57	£10.34	£10.34	£9.74	1.9%	£0.22	2.3%	£9.52
Briton Ferry Town Centre/Neath Road District Centre									
Local shops, Briton Ferry Town Centre	£0.00	£0.65	£0.65	£0.65	£0.65	0.0%	£0.00	0.0%	£0.65
Out of Centre									
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.94	£4.29	£5.23	£5.23	£5.23	2.2%	£0.27	5.1%	£4.96
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.59	£1.20	£1.79	£1.79	£1.79	0.1%	£0.01	0.3%	£1.79
SUB-TOTAL ZONE 2	£3.30	£14.71	£18.01	£18.01	£17.42	4.1%	£0.49	-	£16.92
Zone 3									
Pyle District Centre									
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.39	£14.77	£15.16	£15.16	£15.16	1.3%	£0.15	1.0%	£15.01
Local shops, Pyle	£0.00	£0.59	£0.59	£0.59	£0.59	0.0%	£0.00	0.0%	£0.59
TOTAL	£0.39	15.36	£15.75	£15.75	£15.75	1.3%	£0.15	1.0%	£15.60
Kenfig Hill District Centre									
Local shops, Kenfig Hill	£0.00	£1.17	£1.17	£1.17	£1.17	0.2%	£0.02	0.00%	£1.16
Margam Local Centre									
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.84	£0.84	£0.84	£0.84	0.0%	£0.02	2.2%	£0.82
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
TOTAL	£0.00	£0.84	£0.84	£0.84	£0.84	0.0%	£0.02	2.2%	£0.82
North Cornelly Local Service Centre									
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.29	£0.29	£0.29	£0.29	0.0%	£0.00	0.0%	£0.29
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.59	£0.59	£0.59	£0.59	0.0%	£0.00	0.0%	£0.59
Local shops, North Cornelly	£0.00	£0.92	£0.92	£0.92	£0.92	0.0%	£0.00	0.0%	£0.92
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.35	£1.35	£1.35	£1.35	0.2%	£0.02	1.3%	£1.33
TOTAL	£0.00	£3.15	£3.15	£3.15	£3.15	0.2%	£0.02	0.6%	£3.14
SUB-TOTAL ZONE 3	£0.39	£20.53	£20.92	£20.92	£20.92	1.6%	£0.21	-	£20.71
BEYOND STUDY AREA									
SUB-TOTAL BEYOND STUDY AREA	£12.30	£29.41	£41.71	£41.71	£42.31	16.3%	£1.97		£40.34
TOTAL	£87.55	£89.40	£176.94	£176.94	£176.94	100%	£12.06	-	
Notes:									
a. Survey derived turnovers of all existing destinations for 2029 sourced directly from TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2029 Column Y.									
b. Turnover of proposed Aldi foodstore taken from Table 1 and allows for changes in turnover efficiencies based on Figures 4a and 4b of Experian Retail Planner Briefing Note 21 (February 2024).									
c. Impact based on the proportional change in turnover expressed as a percentage.									
d. Percentage impact tested upon the total turnovers of centres and other retail destinations (i.e. inclusive of inflow from the wider Retail Study area).									
e. Anticipated trade diversion of proposal based on existing shopping patterns and geographic location of existing and proposed provision (as identified by the household telephone shopper survey data)									
f. 'Post-Impact Total Turnover (2029)' = 'Pre-Impact Total Turnover (2029)' minus '£m Diversion (2029)'									
2022 Prices									

TABLE 10: PRE-DEVELOPMENT + POST-DEVELOPMENT CENTRE PERFORMANCE

DESTINATION	Total Convenience Turnover (from Study Area) 2029 Pre-Development	Post-Solus Impact Total Turnover (from Study Area)	Pre-Development Overtrading / Undertrading	Post-Development Overtrading / Undertrading
	Total (£m)	Total (£m)	%	%
Zone 1				
Port Talbot Town Centre B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB Iceland, Aberafan Centre, Port Talbot, SA13 1PB (now closed) Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG Tesco Superstore, Prior Street, Port Talbot, SA13 1YA Local shops, Port Talbot Town Centre	£1.53 £0.00 £1.31 £31.28 £2.84	£1.53 £0.00 £1.31 £28.25 £2.74	170% 0% 68% 143% 226%	170% 0% 68% 129% 218%
TOTAL	£36.96	£33.83	142%	130%
Commercial Road District Centre Aldi, Commercial Road, Port Talbot, SA13 1LG Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£14.63 £0.99	£12.62 £0.99	163% 51%	141% 51%
TOTAL	£15.63	£13.61	141%	122%
Fairway Sandfields, Local Centre Costcutter, Fairway, Port Talbot, SA12 7HR	£0.27	£0.27	13%	13%
Pentwyn Baglan Road, Baglan, Local Centre Local shops, Baglan village centre	£0.96	£0.96	1266%	1266%
Cwmavon, Local Centre Co-op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR Local shops, Cwmafan village centre	£3.51 £0.27	£3.27 £0.27	117% 100%	109% 100%
TOTAL	£3.77	£3.53	115%	108%
Notes: a. Turnovers of all existing destinations for 2029 sourced directly from TABLE 8: TRADE DRAW ALLOCATION OF PROPOSALS and reflects closure of Iceland store in Town Centre. b. Post Solus Impact taken from TABLE 9 - CONVENIENCE GOODS SOLUS TRADING IMPACT (2029) c. Pre-development % figure calculated from net sales floorspace multiplied by sales density at 2029, taken from Global Data 2023. Sales densities grown in accordance with Figures 4a and 4b of that document. Net retail floorspace figures taken from Neath Port Talbot Retail Study (July 2013) by GVA, Retail Assessment by DPP for planning permission P2017/0516 and net retail floorspace figure for Aldi, Commercial Rd supplied by Aldi Stores Ltd (May 2023). Proportion of net floorspace derived from typical company split between convenience and comparison floorspace as identified by Global Data 2023. d. Post-development figure calculated by removing diversion figure from Total Turnover in Table 9 as a percentage of benchmark level. 2022 Prices				

Contact details

Enquiries

Steve Robb MA (Hons), MSc URP MRTPI
(0)7984 118510
steven.robbs@avisonyoung.com

Visit us online

[avisonyoung.com](https://www.avisonyoung.com)

Avison Young

40 Torphichen Street, 6th Floor, Edinburgh EH3 8JB

Copyright © 2022. Avison Young. Information contained in this report was obtained from sources deemed reliable and, while thought to be correct, have not been verified. Avison Young does not guarantee the accuracy or completeness of the information presented, nor assumes any responsibility or liability for any errors or omissions therein. All opinions expressed and data provided herein are subject to change without notice. This report cannot be reproduced, in part or in full, in any format, without the prior written consent of Avison Young.