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Assessment of Retail & Town Centre Planning Policy

Proposed Retail Foodstore and
Food/Beverage Unit, Burrows Yard, Afan Way,
Port Talbot

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Contents

1.	Introduction	3
2.	The Application Site, Proposed Development and Planning Policy Context	5
	The Application Site	5
	The Proposed Development	5
	Planning Policy Context	6
	<i>The Neath Port Talbot County Borough Council Local Development Plan ('LDP')</i>	6
	<i>PPW12</i>	8
3.	The Key Retail & Town Centre Planning Issues	10
	Introduction	10
	Need	10
	Sequential Test	18
	<i>The Applicant's Approach to the Sequential Test</i>	18
	<i>The alternative sites considered by the PRS</i>	20
	<i>Additional Sites</i>	21
	<i>Conclusions</i>	22
	Impact	22
	<i>Financial impact assessment</i>	22
	<i>Wider assessment of impact on town centre vitality and viability</i>	29
	<i>Other impact considerations</i>	32
	<i>Conclusions</i>	33
4.	Summary and Conclusions	34
	Need	34
	The Sequential Test	34
	Impact	35
	Appendix A: Information for 'other' convenience goods floorspace in Port Talbot	36
	Appendix B: Updated financial impact assessment	37
	Appendix C: linked trip analysis	38

Superseded

1. Introduction

- 1.1 This report has been prepared by Nexus Planning ('Nexus') for Neath Port Talbot County Borough Council ('NPTCBC') in relation to a planning application for the redevelopment of land at Burrows Yard, Afan Way in Port Talbot ('the Application Site'). This planning application has been submitted by ALDI Stores Ltd ('the Applicant') and comprises the following description of development:

"Mixed use development comprising a foodstore and coffee shop with drive thru together with associated access, car parking, external lighting, drainage, landscaping, and other associated site works."

- 1.2 A more detailed description of the proposed development is contained in Section 2 of this report.
- 1.3 The planning application has been given reference number P2024/0339.
- 1.4 At the request of NPTCBC officers, Nexus have been instructed to provide written advice on a range of retail and town centre planning policy matters, including:
- a. The need for the proposed development;
 - b. The relationship of the proposal with the sequential test; and
 - c. The likely impact of the proposed development on nearby defined 'town centres'.
- 1.5 A more detailed description of the planning policy context surrounding these three tests can be found in Sections 2 and 3 of this advice report.
- 1.6 As part of our review of the main retail and town centre planning policy issues associated with this proposed development, we have had regard to the following documents submitted by the Applicant:
- a. A Planning and Retail Statement ('PRS'), prepared by Avison Young ('AY'), and dated May 2024;
 - b. A Retail Addendum – Update to Retail Impact Assessment ('RA') document, prepared by AY and dated December 2024;
 - c. A copy of the Experian GOAD plan for Port Talbot town centre; and
 - d. A copy of the results of a survey of household shopping patterns, commissioned by AY and dated April 2023.
 - e. Two additional pack of information, containing data from the applicant's household survey along with further retail expenditure data.
- 1.7 In addition, at the request of NPTCBC officers, this advice report has also taken into account (and responded to) the contents of an objection by Wm Morrison Supermarkets plc ('Morrisons') in a letter prepared by Peacock & Smith ('P&S'), dated 9th October 2024.
- 1.8 The remainder of this advice report is structured as follows:
- a. Within Section 2 we provide a brief summary of the application site, the proposed development and the salient planning policy context for the proposed development.

Superseded

- b. The main part of our advice is contained in Section 3, which discusses the applicant's assessment of the need for the proposed development, its relationship to the sequential test, and the likely impact of the proposal on the health of nearby defined 'town centres'.
 - c. We provide a summary of our advice on retail and town centre planning policy issues in Section 4, along with our recommendations to NPTCBC.
- 1.9 All statistical information, plans and other information, referred to in the main text of this advice report can be found in appendices contained at the rear of this document.

Superseded

2. The Application Site, Proposed Development and Planning Policy Context

The Application Site

- 2.1 The site subject to this planning application comprises vacant previously-developed land, bounded by Water Street and Afan Way. The site is surrounded on all sides by residential development (which is separated from the site by Afan Way, Water Street and Isaac's Place), along with a McDonalds food/beverage unit. The site extends to 1.2 hectares.
- 2.2 The application site has previously been subject to a planning permission for retail development (NPTCBC reference P2004/1778). That permission was granted in December 2005 and allowed for the construction of four retail units. We understand that amendments were made to the original permission, although some of the amendments which were applied for were withdrawn prior to determination. We understand that implementation of the permission commenced although was halted mid-construction. We are not aware of any 'fall back' position being claimed by the applicant / AY.
- 2.3 The application site lies to the south-west of Port Talbot town centre. The PRA¹ indicates that the distance between these two locations is 500 metres. We would broadly agree with this measurement, with this comprising a route from the north-eastern edge of the application site along Water Street, across the A48 (Heilbronn Way), and via a pedestrian subway (underneath the main Cardiff, Port Talbot, Swansea railway line) and into the Aberafan Shopping Centre.

The Proposed Development

- 2.4 The submitted planning application proposes the redevelopment of the application site to provide two separate new buildings, along with associated development (including parking and access arrangements). The larger of the two proposed units is intended to provide a Class A1 foodstore of 1,910sq gross internal area. This unit will be located in the western part of the application site, with customer car parking to the east and south. Servicing access will be taken from the north of the unit, off Water Street, whilst the customer vehicular entrance will be from Afan Way. There will also be pedestrian entrances into the site from both of these highways.
- 2.5 The second proposed building is a Class A3 food and beverage ('F&B') unit. This unit is proposed to be placed in the eastern part of the application site. It will lie adjacent to an area of surface level car parking provision and will also have a physical facility whereby customers of the F&B unit can collect their purchases from their vehicle rather than purchasing and collecting their purchases 'on foot'. The size of the proposed F&B unit will be 171sq m gross.
- 2.6 The PRS² indicates that the total net sales area of the proposed foodstore will be 1,356sq m. For the avoidance of doubt, this area relates to the whole of the publicly accessible area of the foodstore, including the area where goods are displayed, circulation areas, and the whole of the customer checkout areas (including packing areas). As will be noted in the next section of this advice report, an alternative 'reduced' net sales area, of 1,154sq m, is adopted for the purposes of calculating quantitative need and financial impact³. Both of these definitions are valid for the purposes of this advice report, and will need to be borne in mind when considering the various salient issues associated with this proposal. However, it is also relevant to note that, in general terms, 80% of the net sales area of the proposed store will be devoted to the sale of convenience goods, with the remaining 20% selling comparison goods.
- 2.7 The intended occupant of the proposed foodstore will be ALDI. The identity of the applicant and intended occupiers for the proposal should not, in our opinion, unduly influence the application of the main retail and town centre planning

¹ Paragraph 2.2 of the PRA

² Paragraph 3.2

³ See also Section 2 of the AY RA document for further information on this issue

Superseded

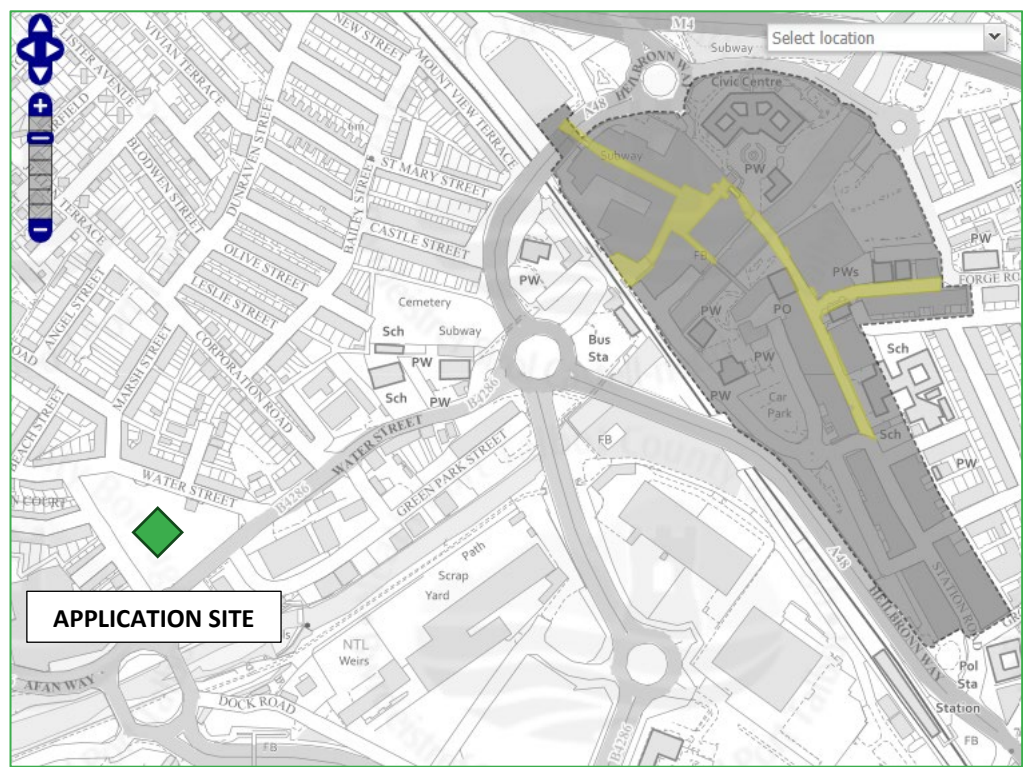
policy tests. It is, however, important to note that ALDI already operates a foodstore in Port Talbot, at Commercial Road. This unit forms part of the defined Taibach district centre in the development plan and extends to 857sq m net sales⁴.

Planning Policy Context

The Neath Port Talbot County Borough Council Local Development Plan ('LDP')

- 2.8 The LDP was adopted in January 2016 and forms the main part of the development plan for the application site and this proposed development. The site subject to this planning application is not allocated for any specific land use within the development plan proposals map and lies outside of the series of defined 'town centres' in Port Talbot⁵.
- 2.9 Figure 2.1 below provides an extract from the LDP proposals map showing the location of the application site in relation to the defined area of Port Talbot town centre. The grey shaded area shows the extent of the defined town centre boundary whilst the defined primary shopping streets are shaded yellow.

Figure 2.1: extract from LDP policies map showing application site and Port Talbot town centre.



- 2.10 Given the location and planning policy status of the application site, it is important to confirm the salient requirements for this application in relation to retail and town centre planning policy, namely the need, sequential and impact tests.
- 2.11 Given that the application site lies outside of the defined boundary of Port Talbot town centre, Policy R3 of the LDP will apply. An extract from the LDP for Policy R3 is reproduced in Figure 2.2 below:

⁴ Net sales area figure taken from Table 6b of the AY RA document (based on the total net sales area of the existing ALDI store).
⁵ The Local Development Plan includes the following 'town centres' in the retail hierarchy in the Port Talbot / Taibach / Baglan area (Table 5.4 of the LDP): Port Talbot town centre, Taibach district centre, plus several local centres.

Superseded

Figure 2.2: extract from LDP for Policy R3 (out of centre retail proposals)

Policy R 3
Out of Centre Retail Proposals

Proposals for new retail development or additional retail floorspace within settlement limits but outside the defined retail centres or retail allocations will only be permitted where:

1. It is demonstrated that there is a need for the development; and
2. The development cannot be accommodated within a defined retail centre and is located in line with the sequential approach; and
3. The vitality and viability of existing retail centres will not be undermined taking into account the cumulative effects of other approved retail developments, recently completed developments and plan commitments; and
4. The proposal would not undermine the Council's retail hierarchy or any regeneration schemes that the Council has formally approved;

Or:

5. The proposal is within the Coastal Corridor Strategy Area and is for a new retail unit, change of use or extension resulting in a premises of 100m² gross floorspace or less and is demonstrated to serve local neighbourhood needs; or
6. The proposal is within the Valleys Strategy Area and is a new retail unit, change of use or extension resulting in a premises of 200m² gross floorspace or less.

2.12 Parts 1-4 of Policy R3 are applicable to this proposal and confirm that the need, sequential and impact policy tests apply, along with a requirement to ensure that the proposal does not undermine the Council’s retail hierarchy or any ‘approved’ regeneration schemes. The Council’s formal retail hierarchy, as set out in the LDP⁶, is contained in Figure 2.3 below.

⁶ Table 5.4, page 63, of the LDP

Superseded

Figure 2.3: extract from LDP – retail hierarchy for Neath Port Talbot

Tier of Hierarchy	Centre
Town Centre	Neath Port Talbot Pontardawe
District Centre	Skewen Briton Ferry Taibach Glynneath
Local Centre	Gwaun Cae Gurwen Ystalyfera Crynant Resolven Croeserw Heol Jiwbili, Cwmafan Fairwood Drive / Lodge Drive, Baglan Pentwyn Road, Baglan Fairway, Sandfields Margam

PPW12

- 2.13 The contents of PPW12 will be a key material consideration for NPTCBC’s determination of this planning application, with Section 4 providing national policy on retail and town centre matters. In relation to retail and town centre planning matters, PPW12 is supported by Technical Advice Note 4 (Retail & Commercial Development) which was published in November 2016.
- 2.14 With regards to the requirement to assess a need for the proposed development, paragraph 4.3.14 of PPW12 notes that:
- “In deciding whether to identify sites for comparison, convenience or other forms of retail uses in development plans or when determining planning applications for such uses, planning authorities should first consider whether there is a need for additional retail provision. However, there is no requirement to demonstrate the need for developments within defined retail and commercial centre boundaries or sites allocated in a development plan for specific retail uses”.*
- 2.15 PPW12 provides further explanation of the assessment of ‘need’, as does TAN4, and the salient parts of these documents are referred to in the next section of this advice report.
- 2.16 Given the location of the application site outside of the defined boundaries of the town, district and local centres in Port Talbot, the sequential test will apply to this proposal. Paragraphs 4.3.18 – 4.3.21 of PPW12 note:
- “4.3.18 The Welsh Government operates a ‘town centres first’ policy in relation to the location of new retail and commercial centre development. Future Wales provides further context on ‘town centres first’ policy in respect of large scale and out of centre development. In implementing this policy, planning authorities should adopt a sequential approach to the selection of new sites in their development plan and when determining planning applications for retail and other complementary uses. By adopting a sequential approach first preference should be to locate new development within a retail and commercial centre defined in the development plan hierarchy of centres.*
- 4.3.19 If a suitable site or building is not available within a retail and commercial centre or centres, then consideration should be given to edge of centre sites and if no such sites are suitable or available, only then should out-of-centre sites in locations that are accessible by a choice of travel modes, including active travel and public transport, be considered. Developers should demonstrate that all potential retail and commercial centre options, and then edge-of-centre options,*

Superseded

have been thoroughly assessed using the sequential approach before out-of-centre sites are considered. The onus of proof that central sites have been thoroughly assessed rests with the developer.

4.3.20 Edge-of-centre or out-of-centre sites should be accessible by a choice of public and private modes of travel. New out-of-centre retail developments or extensions to existing out-of-centre developments should not be of a scale, type or location likely to undermine the vibrancy, attractiveness and viability of those retail and commercial centres that would otherwise serve the community, and should not be allowed if they would be likely to put development plan retail strategy at risk. The extent of a sequential test should be agreed by pre-application discussion between the planning authority and the developer.

4.3.21 The sequential approach applies to retail and all other uses complementary to retail and commercial centres. Other complementary uses include, for example, financial and professional services (A2), food and drink (A3), offices (B1), hotels (C1), residential institutions (C2), educational and other non-residential establishments (D1), leisure (D2) and certain other uses such as launderettes and theatres”.

2.17 With regards to the assessment of impact, paragraphs 4.3.25 & 4.3.26 note that:

“4.3.25 Retail developments outside designated retail and commercial centres, and which are not located on an allocated site, can impact on the viability and vibrancy of a centre. Impacts resulting from such development, whether individual or cumulative, may include changes in turnover and trading ability, consumer choice, traffic and travel patterns, footfall, as well as affect centre regeneration strategies and existing or proposed retail sites allocated in the development plan. The purpose of the retail impact assessment is to consider these issues and determine if these developments are likely to have detrimental consequences.

4.3.26 All retail planning applications or retail site allocations of 2,500 sq. metres or more gross floorspace that are proposed on the edge of or outside designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment”.

2.18 Section 8 of TAN4 provides further guidance on the application of the impact test, including the key considerations to be taken into account.

3. The Key Retail & Town Centre Planning Issues

Introduction

3.1 Based upon the scale and type of land uses included within this application, along with its location and associated planning policy status, there is a requirement for the following

- a. Need
- b. The sequential test
- c. Impact

3.2 We consider each issue in turn below.

Need

3.3 As set out in Section 2 of this advice report, the assessments of need for this proposed development will be guided by the LDP (Policy R3), PPW12 and TAN4. National policy makes it clear that assessments of need should incorporate both quantitative and qualitative factors, although both PPW12 and TAN4 make it clear that quantitative factors should take precedence.

3.4 The information submitted by the applicant acknowledges the requirement to demonstrate a need for the proposed development and concentrates upon the proposed foodstore element. The PRS provides assessments of both quantitative and qualitative need, with the RA providing an updated quantitative assessment.

3.5 The applicant's assessment of quantitative need, as set out in the RA document, follows a standard step-by-step approach:

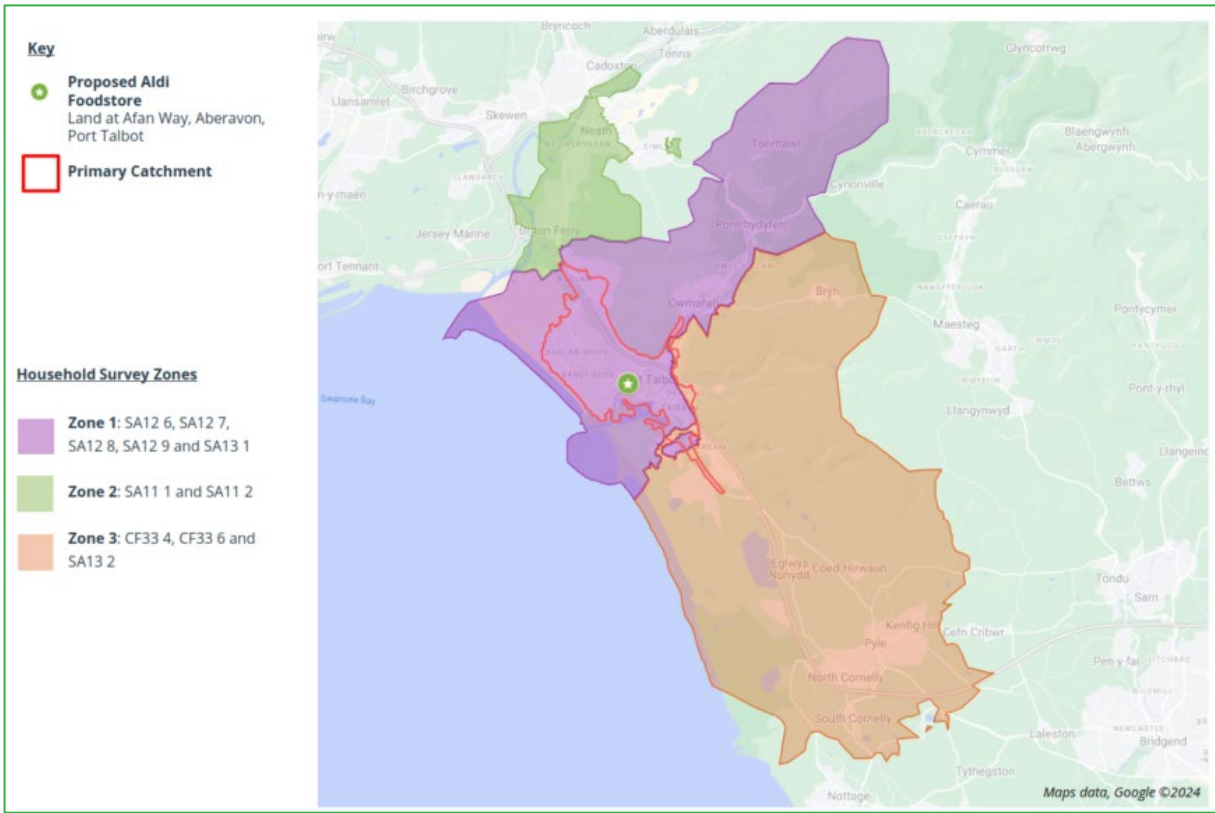
- a. Setting a study area for the quantitative assessment;
- b. Calculating the amount of resident population and their average per capita retail expenditure levels, in order to arrive at a total available of available retail expenditure within the study area;
- c. Assessing current shopping patterns in the Port Talbot area, along with the market share of existing stores and centres;
- d. Calculating the study area derived turnover of existing stores and centres in the study area;
- e. Assessing the level of quantitative need in the relevant part of the study area by comparing existing actual turnover levels (including study area derived turnover and expenditure inflow) with the benchmark turnover of existing stores / floorspace, in order to provide a residual level of 'available' retail expenditure; and
- f. Assessing whether a quantitative need exists for the proposed retail floorspace by comparing the residual level of 'available' expenditure with the turnover of the proposal.

3.6 As a starting point for our review of the applicant's quantitative need assessment, it is important to highlight the following:

Superseded

- a. The assessment of quantitative need shares a considerable amount of base data with the assessment of financial impact of the proposed foodstore. Therefore, the comments provided below regarding the various data sources and assumptions used by the applicant will be equally applicable to our review of ‘impact’ issues later in this advice report.
 - b. The applicant’s quantitative assessment concentrates upon the convenience goods floorspace element of the proposed foodstore. This is considered to be reasonable bearing in mind that 80% of the net sales area of the proposed foodstore will be devoted to the sale of these types of products. However, as acknowledged by the applicant’s PRS, there is a need to consider the impacts associated with the comparison goods element of the foodstore and this is covered by our advice to NPTCBC.
 - c. For the purposes of our review of the applicant’s assessment of quantitative need, we have taken into account the contents of both the PRS and RA documents, although the RA document is given most attention in light of its more detailed information on the level ‘available’ convenience goods expenditure to support the proposed foodstore.
- 3.7 A key influence over the assessment of quantitative need is the content and extent of the study area which chosen by applicant. The plan at Appendix I to the PRS shows the study area which has been adopted at AY, along with the assumed primary catchment area of the proposal. This is shown in Figure 3.1 below.

Figure 3.1: study area for the applicant’s assessment of quantitative and financial impact



- 3.8 As explained by paragraph 7.5 of the PRS, the study area adopted by the applicant (shown in Figure 3.1) is based in part of the study area used within the 2013 Retail Study. Figure 3.2 below provides an extract from the 2013 Retail Study and

Superseded

it can be seen that Zones 1 and 3 of the current study area cover the same areas as Zones 2 and 3 from the 2013 study. Zone 2 of the applicant’s current study area covers the southern part of Zone 1 of the 2013 Retail Study.

3.9 Based upon shopping patterns data gather for the 2013 Retail Study, we consider that the current study area is likely to capture the majority of trading patterns associated with retail stores in the Port Talbot area and is a reasonable basis for the assessments of quantitative need and financial impact.

Figure 3.2: extract from 2013 Retail Study – quantitative need assessment study area plan



3.10 The objection from Morrisons suggests that the applicant’s quantitative assessment should be based upon the primary catchment area shown on the plan at Appendix I of the PRS (and reproduced above in Figure 3.1). Whilst the provision of information to show a 5 minute drive-time from the applicant site provides a useful depiction of a reasonable travel time to the proposed foodstore, a robust assessment of quantitative need will need to take into account the remainder of the Port Talbot area (some of which may not be covered by the above five minute drive-time). Therefore, we consider that AY’s decision to adopt Zone 1 of the study area as the basis for the quantitative need assessment is reasonable.

3.11 With regards to various data inputs and assumptions contained within the applicant’s PRS and RA documents, we make the following observations:

- a. Net sales area of the proposed foodstore. As noted in Section 2 of this advice report, the total publicly accessible area within the proposed foodstore extends to 1,356sq m. However, as noted by the RA, an alternative definition of the proposed store’s net sales area should be adopted in order to match the basis for calculating the ALDI company average sales density which is used to forecast the total annual turnover of the proposed store. GlobalData, who supply the relevant sales density data, exclude *inter alia* the checkout areas of foodstores in their calculations and concentrate upon the ‘selling area’ of foodstores / supermarkets for sales density levels. As a consequence, the net sales area of the proposed foodstore at the application site should

Superseded

- be reduced to 1,154sq m in order to provide a consistent method of calculating store turnover levels. For the purposes of calculating convenience goods turnover, 80% of this reduced net sales area is adopted.
- b. ALDI sales density. For the purposes of calculating the annual turnover of the proposed foodstore, AY have adopted a convenience goods sales density of £12,961/sq m and a comparison goods density of £5,136/sq m. These are taken from 2023 data provided by GlobalData and are considered to be robust for the purposes of this particular assessment.
 - c. Population and per capita convenience goods expenditure. In order to inform its assessment, AY has adopted population and per capita retail expenditure which was obtained from Experian at May 2024. This is considered to be robust for the purposes of the quantitative assessment. The base per capita retail expenditure levels have also been projected forward to 2024 and 2029, using the latest economic forecasts in Experian's Retail Planner Briefing Note 21 (2024) which is considered robust for the purposes of this assessment, as it the timeframe for the assessment (2024-2029).
 - d. Market shares. Given the age of the household survey commissioned to inform the 2013 retail study, AY and the applicant have taken the decision to commission a new household survey, which was conducted in April 2023. The decision to commission a new survey is welcomed and allows the PRS and RA documents to be based upon a robust set of shopping patterns data⁷. The 2023 survey interviewed 463 people within the study area, across the following sample sizes: Zone 1 – 228 interviews; Zone 2 – 95 interviews; Zone 3 – 140 interviews. These sample sizes are considered to be robust for the purposes of the quantitative need and impact assessments. In addition, we also welcome the use of the 2023 survey data on first and second choice main and top-up food shopping destinations in the assessment of store / centre market share and turnover levels⁸.
 - e. Benchmark turnover of existing convenience goods stores (floorspace). In order to estimate whether there is any 'surplus' convenience goods expenditure to support net additional convenience goods expenditure within Zone 1 of the study area, Table 6b of the RA provides an assessment of the benchmark turnover of existing convenience goods floorspace in Zone 1. The floorspace data within Table 6b is gathered from a number of sources, including the 2013 Retail Study, planning application data and AY's re-assessment of the net sales area in the existing ALDI store at Taibach⁹. All of the floorspace figures used in Table 6b appear to be reasonable, although we have asked AY to provide additional information and confirmation around the 'other' (out of centre) floorspace figure of 993sq m net. Given that Table 6b does not attempt to provide an average sales density based trading performance for this 933sq m of floorspace, January 2025 package of information provided by AY has, instead, provided additional detailed information regarding the market share data which has been used to inform the turnover calculation for this 'other' floorspace. This is contained at Appendix A to this advice report. Based upon this list of stores, and having regard to planning application information for these properties, we consider that the allowance of 933sq m is reasonable. Based upon a current study area derived turnover of £1.84m, the use of a floorspace figure of 933sq m, provides for a current sales density of just under £2,000/ sq m. This is considered to be reasonably low, particularly when compared with the £3,000/sq m which AY use for Baglan village centre.
 - f. Benchmark turnover of existing convenience goods stores (sales densities). In relation to sale density levels, data for individual 'named' stores are taken from 2023 research from GlobalData. At the time of preparing the

⁷ In particular, the 2023 household survey has collected data on first and second choice main and top-up food shopping trips, along with the various types of comparison goods shopping. The new survey has also ascertained information on linkages between main and top-up food shopping trips and visits to other retail, service and commercial uses.

⁸ See Tables 3, 4 and 5 of the RA document.

⁹ In order to match the net sales floorspace of the proposed ALDI store at Afan Way, the total net sales area of the Taibach ALDI has been reduced to exclude non-selling areas.

Superseded

PRS document, the 2023 GlobalData figures would have been the latest available, although they have now been superseded by 2024 data. For other stores, a convenience goods sales density of circa £5,000/sq m is used for Port Talbot town centre, whilst £3,000/sq m is used for Baglan local centre and £2,446/sq m for stores in Taibach district centre. A figure of £3,000/sq m is used for the Filco store in Taibach district centre.

- g. Expenditure inflow. In order to estimate the level of convenience goods expenditure which is 'available' to support existing and new retail floorspace in Port Talbot, it is common practice to include, where reasonable, allowance for expenditure flowing into the study area (known as 'expenditure inflow'). This is an allowance made at Table 6c of the RA and equates to £5.3m at both 2024 and 2029. AY note that a similar allowance was made in the 2013 Retail Study (5%) and this has been increased to 6% to account for a slightly smaller study area being used for this current quantitative need / financial impact assessment. We consider that such an approach is reasonable.

3.12 Table 6c in the RA document brings together the preceding parts of the applicant's analysis and provides an assessment of quantitative retail expenditure capacity. The structure of Table 6c is focused upon quantitative need levels in Zone 1 and shows:

- a. The amount of convenience goods expenditure which existing stores in Zone 1 are attracting from Zone 1 residents;
- b. The amount of expenditure which is being attracted by Zone 1 stores from the two other zones in the study area;
- c. The 6% allowance for 'expenditure inflow' (as described above).

3.13 These three amounts of expenditure are then combined to provide a total turnover for Zone 1 stores of £101.3m in 2024, rising slightly to £101.6m in 2029. These levels are then compared with the benchmark turnover of existing convenience goods floorspace in Zone 1, with the applicant's Table 6b considers to be £88.7m in 2024 and £88.6m in 2029. The result is a 'surplus' of £12.6m of convenience goods expenditure in 2024, falling very slightly to £12.0m in 2029. This can be compared with AY's predicted convenience goods turnover for the proposed store and indicates that there is enough 'surplus' expenditure (within £0.1m) to cover the turnover of the proposed additional convenience goods floorspace.

3.14 However, as noted above, there is a need to take into account updated benchmark turnover levels within the quantitative analysis. The main area of update will be in relation to the latest national average sales density figures provided by GlobalData, which is based upon 2024 trading levels. This data has been utilised, but rebased to 2022 prices in order to match the AY assessment and is shown in Table 3.1 below.

3.15 In relation to other parts of the updated benchmark assessment, the notes to Table 3.1 provide clarity over which figures from the latest AY assessment remain unchanged, or where they have been updated. Apart from the larger foodstores/supermarkets (where GlobalData figures are utilised), the AY figures remain largely unchanged, although we have increased the density for local shops in Taibach to £3,000/sq m in order to match Baglan village centre.

Superseded

Table 3.1: updated convenience goods floorspace benchmark turnover levels

STORE / CENTRE	Net Convenience Goods Floorspace (sq m)	Convenience Goods Sales Density (£/sq m)	Total Convenience Goods Benchmark Turnover (£m)	Notes
B&M	204	4,361	£0.89	No change to AY figure
Home Bargains	424	4,530	£1.92	No change to AY figure
Tesco	1,678	14,360	£24.10	Updated figure to reflect 2024 GlobalData forecast
Local shops, town centre	250	5,000	£1.25	No change to AY figure
ALDI, Commercial Road	686	13,712	£9.41	Updated figure to reflect 2024 GlobalData forecast
Filco	645	3,000	£1.94	No change to AY figure
Local shops, Taibach	85	3,000	£0.26	Increased to £3,000/sq m
Costcutter, Fairway	390	5,089	£1.98	No change to AY figure
Local shops, Baglan village centre	25	3,000	£0.08	No change to AY figure
Co-op, Cwmavon	300	10,909	£3.27	Updated figure to reflect 2024 GlobalData forecast
Local shops, Cwmavon	-	-	£0.25	No change to AY figure
Iceland, Baglan	940	6,370	£5.99	Updated figure to reflect 2024 GlobalData forecast
Lidl, Baglan	791	6,327	£5.00	Updated figure to reflect 2024 GlobalData forecast
Morrisons, Baglan	2,660	9,780	£26.01	Updated figure to reflect 2024 GlobalData forecast
Other			£1.84	No change to AY figure
Total			£84.18	

Notes: Floorspace and sales density information taken from Avison Young Retail Addendum document and 2024 GlobalData grocery retailer sales density research

- 3.16 As shown in Table 3.1 above, the updated overall benchmark turnover figure for convenience goods stores in Port Talbot is £84.18m. This is slightly lower than the £88.71m indicated with the RA document. At this level, there would be sufficient ‘surplus’ convenience goods expenditure to accommodate the convenience goods turnover of the proposed foodstore.
- 3.17 In addition, bearing in mind our comments earlier in this section regarding the indicative sales density levels for unnamed ‘local’ or ‘other’ convenience goods stores within Port Talbot, along with the sales density assigned to the Filco store, it is likely that the use of a higher density (say, £5,000/sq m, rather than £3,000/sq m) is unlikely to change or conclusions on the issue of quantitative need.
- 3.18 Turning to qualitative need, Section 7 of the applicant’s PRS provides an assessment which is structured to respond to paragraph 4.3.16 of PPW12. We respond to each of the elements of the applicant’s analysis below.

Does the proposal support the objectives of the development plan or PPW12 policies?

- 3.19 Paragraph 7.31 of the PRS indicates that the proposal would support the LDP strategy through job creation, improved sustainability and regeneration of brownfield land. In response, it should be noted that there is not a specific LDP policy directed towards the application site, although the re-use of this vacant brownfield site should be acknowledged as a positive factor in favour of the proposed development. The other factors, relating to job creation and sustainability could

Superseded

also be positive factors, although: (a) the applicant does not provide an assessment of the net impact of the proposal on job creation; and (b) the benefits via reduced travel are limited (see our analysis of trade draw and diversion later in this advice report).

Is the site accessible by walking, cycling and public transport?

3.20 Paragraph 7.32 of the PRS makes the point that the proposal will be accessible for those shoppers wishing to visit the new foodstore on foot (and cycle). It is also claimed that the proposed store is *“an even more sustainable option than ALDI’s existing over-trading store at Taibach”*. Officers will, no doubt, be guided by colleagues in the local highway authority regarding the wider aspects of sustainability for this proposal (including non-car accessibility), although the claims regarding the new ALDI being more sustainable than its existing store should be seen in context.

3.21 In particular, whilst the new store will be more accessible to residents of the northern half of Port Talbot no analysis has been provided by AY to substantiate these claims. In addition, it should also be borne in mind that the proposed store is in an out of centre location, not surrounded by other retail, service and commercial uses, whereas the existing store lies within a defined district centre (which is a preferred location for retail land uses).

Does the proposal contribute to a substantial reduction in car journeys?

3.22 Paragraph 7.33 of the PRS notes that *“By diverting trade from more distant locations, including the current overtrading Aldi store at Taibach, which is in a less sustainable location than these proposals, there will be an opportunity to reduce car journeys through these development proposals. It is therefore apparent that the proposals will also satisfy this criterion of PPW in terms of qualitative need considerations”*. However, none of these claims are substantiated and it should be noted that, based upon our own re-assessment of trade diversion, the potential for claw-back of trips/trade from more distant foodstores outside of Port Talbot is limited.

Does the proposal contribute to the co-location of facilities?

3.23 In relation to this factor, AY point to the co-location of the two elements of the proposed development, plus the potential for linkages with Port Talbot town centre. Linked trips may be possible, although a specific analysis is not provided, and it is also notable that the proposed development will not be located adjacent to other retail or commercial uses.

Will the proposal assist with the alleviation of over-trading?

3.24 In relation to this issue, AY point to: (a) ‘the degree of overtrading’ at the existing Tesco and ALDI stores in Port Talbot; (b) reducing the existing overtrading at the existing ALDI store at Taibach (via the introduction of a second ALDI store); and (c) operational problems associated with stock levels and congestion at unnamed stores. In response, we agree that the ALDI and Tesco stores trade above their respective company averages. It is also important to note that, based upon the applicant’s 2023 household survey, the Lidl store trades around benchmark average turnover, whilst the Morrisons below average level.

3.25 In addition, it should also be noted that the 2023 survey contains market share regarding the former Iceland store in Port Talbot town centre. That store closed in Spring 2023 and therefore the expenditure associated with that store will have been redistributed. The full extent of this redistribution is dealt with later in this section of our advice, although the trading performance picture for the new Iceland Food Warehouse (i.e. trading below the respective company average) may well have improved beyond the results of the 2023 household survey.

3.26 Overall, as demonstrated by the preceding quantitative analysis, the collective picture for trading performance is that existing stores are (collectively) trading above their aggregate benchmark average levels. However, within this overall

Superseded

picture, there is a mixed trading performance, with trading above and below average levels. Added to this overall picture is the trading performance of the existing ALDI store at Commercial Road, Taibach. The 2023 household survey results suggest that the existing ALDI store trades above its company average performance level and paragraph 7.37 of the PRS indicates that the Afan Way proposal will divert trade from the Commercial Road store “allowing it to trade at the levels it was designed to, improving operational efficiency, and enhancing the consumer experience as a result”.

- 3.27 In general terms, with agree with point made at AY regarding the reduction in trade at the existing ALDI and there is no other available evidence to suggest that the store is not trading above company average levels. Indeed, the current level of comparative performance is unsurprising given the small size of the existing ALDI store. However, it is important to point out at AY do not provide any evidence to substantiate the points made around congestion and stocking levels.
- 3.28 Overall, we consider that some positive weight can be placed in support of this indicator given the issues outline above, although this weight is, based upon the evidence, limited, given the mixed performance of existing stores and the lack of detailed evidence provided by AY and the applicant.

Does the proposal address locally defined deficiencies in provision in terms of quality and quantity

- 3.29 With regards to qualitative and quantitative deficiencies, AY make reference to: (a) the ‘over trading’ of the existing ALDI; (b) the suggestion that the presence of only two existing discounter foodstores in Port Talbot is a sign of a deficiency in provision; and (c) the proposal would bring a new discount foodstore closer to Port Talbot town centre; and (d) a deficiency caused by the existing ALDI and Lidl stores being approximately 2km from the residential neighbourhoods around Afan Way (i.e. the area around the current application site).
- 3.30 Whilst the general improvement of choice in retail provision should be seen as a positive factor, the weight which can be attached to a potential improvement will no doubt be linked back to the baseline position. In the case of Port Talbot and the surrounding area, there are two reasonably large supermarkets (Tesco and Morrisons), along with two discount foodstores and an Iceland Food Warehouse. These stores are supplemented by a variety of in-centre and out of centre smaller specialist stores, along with the convenience goods offer of the town centre Home Bargains and B&M stores.
- 3.31 In relation to qualitative factors, the 2013 Retail Study notes:

“5.11 Port Talbot lies in Zone 2 of the study area and attracts 80% of main food shopping trips and 72% of top-up food shopping trips from this zone. For both main and top-up food shopping out of centre stores (such as the Morrisons) are more popular destinations than town centre stores. For main food shopping, the out of centre market share is 47% in Zone 2, whereas the town centre market share is 33%. For top-up food shopping the out of centre market share is 51%, whereas the top-up market share is 20%.

5.12 Stores in Port Talbot also attract a significant market share of spending from residents of Zone 3, including 47% of main food shopping trips and 34% of top-up food shopping trips. Beyond these zones, Port Talbot has a much smaller market share in Zones 1, 4, 6, 7 and 8.

5.13 Like Neath, Port Talbot has a reasonable balance of convenience stores in the town centre and in out of centre locations although the balance is in favour of out of centre locations, including Morrisons, Aldi and Lidl stores. Within the town centre, the two main convenience goods stores are Tesco and Iceland, although only the Tesco is able to attract any significant amounts of main food shopping expenditure, with the Iceland and other smaller stores concentrating on top-up food shopping trips.

5.14 Overall, and like Neath, we do not conclude that Port Talbot has a qualitative deficiency in convenience goods retail provision. A range of main and top-up food shopping facilities are available in both town centre and out of centre

Superseded

locations and there is reasonable choice for both local residents and visitors to the town. We consider that the balance of main and top-up food shopping facilities is an important aspect of provision in Port Talbot, with the town centre Tesco store making an important contribution to choice and competition in the central area”.

- 3.32 In our view, the proposed development will improve qualitative aspects provision but this should be set alongside a general absence of current deficiency. As a consequence, only limited positive weight should be assigned.

Does the proposal alleviate a lack of convenience goods provision within a disadvantaged area?

- 3.33 Paragraphs 7.40-7.47 of the PRS provide information regarding the levels of deprivation in and around Port Talbot and highlights available data which shows that a number of areas surrounding the application site are within the most 10% deprived in Wales. This is an important baseline characteristic to be taken into account and then leads into the question of whether the proposed development will alleviate a lack of convenience goods provision in these areas.

- 3.34 The analysis which is provided by AY concentrates upon the travel distance from the application site to the two existing discount foodstores in Port Talbot: ALDI and Lidl. In response, there are two points to note:

- a. Whilst the distance measurements in Section 7 are factually correct, it is important to remember that they measure the distance from the applicant site to two existing foodstores. Alternative measurements from local residential communities would also be useful in describing various aspects of accessibility for the local community.
- b. Whilst grocery operators such as ALDI and Lidl, also known as Limited Assortment Discounters ('LAD'), have traditionally been associated with lower priced groceries (which continues to be the case), it is also important to consider other stores. These will include the Morrisons and Tesco stores in Port Talbot, both of which offer a full grocery range, along with other discount-orientated stores such as B&M and Home Bargains (which offer a more limited range of convenience goods provision). Distance measurements to Port Talbot town centre, which includes the Tesco supermarket, are missing from the AY analysis.

Qualitative need - conclusions

- 3.35 Taking into account all of the above factors, we consider that the proposed store will provide a qualitative improvement to convenience goods provision in the Port Talbot area, by providing modern medium-sized foodstore. However, the scale of qualitative benefit which can be afforded to the proposed development is, in our opinion, tempered by the lack of any current qualitative deficiency in convenience goods retail floorspace provision in the local area and also the absence of supporting information for some of the benefits claimed by AY.

Sequential Test

The Applicant's Approach to the Sequential Test

- 3.36 Given the location of the application site outside of any defined 'town centre' there is a requirement for the applicant and NPTCBC to consider the proposal against the sequential. This is acknowledged by the applicant in the PRS and an assessment of alternative sites and premises provided.
- 3.37 As a starting point for the sequential site assessment, it is important to examine the approach which the applicant has adopted, including the approach to the scale and form of the proposed development, the flexibility which has been employed when examining alternatives and also the area of search for alternatives.

Superseded

- 3.38 In relation to this latter point, Section 8 of the PRS indicates that the focus for the applicant's search for alternative locations for its assessment has been based upon the primary catchment area of the proposal. Such an approach is based upon best practice and we support this robust starting point. In relation to this 'primary catchment area' paragraphs 8.9 and 8.10 of the PRS note that: (a) the catchment area is unlikely to extend beyond Port Talbot; (b) a discount store of the size proposed by ALDI requires a catchment population of 15,000 people; and (c) a five minute drive-time has been adopted for the search for alternatives.
- 3.39 Clearly, the use of a 5 minute drive-time for the search for alternatives needs to be considered against the wider area of Zone 1 which is used as focus for the quantitative need assessment. Whilst these two areas do not have to match exactly, there should be some similarities. In order to help with this comparative exercise, reference can be made to existing shopping patterns. The applicant's own (2023) household survey shows that the larger foodstores/supermarkets draw trade from across Zone 1, plus Zone 2 (and to a much lesser extent, Zone 3) of the study area.
- 3.40 Therefore, whilst the 5 minute drive time will be a useful starting point, we would recommend that the Margam and Baglan areas are also included in the primary catchment area. This would appear to generally correlate with the suggestion, by AY, that ALDI stores require a catchment population of 15,000 people, with Zone 1 of the study area containing just over 40,000 people. It will be noted that Zone 1 of the study area also includes a reasonable level of resident population in the villages of Cwmafan, Pontrhydyfen and Tonmawr. The extent of Zone 1 does not necessarily prove that this geographic area can support two ALDI stores in Port Talbot although it is clear that the primary catchment for the proposed store is likely to require more than a five minute drive time.
- 3.41 Paragraph 8.11 of the PRS indicates that five defined 'town centre's have been examined and we consider that these are reasonable for the purposes of the sequential test in this particular instance.
- 3.42 With regards to flexibility, this concept is also acknowledged by AY and a series of parameters are outlined for both the foodstore and food/beverage outlet elements of the proposal. The level of detail which has been provided in the PRS is useful and assists with an examination of the applicant's approach to flexibility.
- 3.43 For the foodstore element, the PRS indicates that this occupies around 0.95ha of the 1.2ha application site (at Afan Way). The PRS explains the potential for flexibility in the scale and format of floorspace and also the amount of car parking provision. Whilst the PRS does refer to the Aldergate Properties v Mansfield District Council judgement, which confirms that the application of the sequential test should be based upon the broad type of development which is proposed¹⁰, the PRS does appear to conflict with the key messages in Mansfield and refers on a number of occasions to the self-imposed requirements of ALDI. That said, flexibility in the size of the foodstore element of the site is applied by AY, reducing the minimum site size to 0.8ha. This is supported by the need to ensure that, whilst alternatives do not necessarily need to accommodate precisely the same form and scale of development as the submitted application, they must nevertheless be able to accommodate a development which performs a materially similar role.
- 3.44 As a consequence, examination of alternatives based upon a minimum site size for the foodstore element of the proposal of 0.8ha seems reasonable. In particular, there is requirement to accommodate a foodstore unit which is able to sell a reasonably similar range of convenience and comparison goods to the proposal (and perform a similar function), whilst there is also a requirement to ensure adjacent customer car parking provision (given the size of shopping purchases within the proposed foodstore).
- 3.45 A reduction, in the interests of flexibility, is also applied to the food and beverage element of the proposal, reducing the site size requirement from 0.26ha to 0.21ha. It is not entirely clear how this 19% reduction in site size is achieved, although it would appear from paragraph 8.31 of the PRS that little flexibility has been employed in relation to the size

¹⁰ And which generally excludes the identity and personal/corporate attitudes of an individual retailer

Superseded

of the food/beverage unit and AY has maintained a need for circa 20 customer car parking spaces and the physical drive through element of the development.

- 3.46 In our opinion this is an inflexible approach, particularly in relation to the provision of car parking and the drive through element. In particular:
- a. The provision of circa. 20 car parking spaces is, in part, a product of the location of the application site (i.e. out of centre). Such provision would not be required if the proposed food/beverage unit was located in-centre, particularly as it does not have the same shopping characteristics as the proposed foodstore. In addition, there may well be opportunities for the proposed food/beverage unit to share car parking provision with the proposed foodstore.
 - b. With regards to the physical drive through facility, we would question whether this is a fixed and necessary part of the proposal. In particular, the primary purchase of the unit is to sell food and beverages to visiting members of the public, for consumption either on or off the premises. Car parking provision is also provided adjacent to the unit. Therefore, we do not consider that the assessment of alternative sites need to include a physical drive through facility as a fixed element.

3.47 In light of the above, whilst the applicant has acknowledged the need to be flexible in the consideration of alternative sites/premises, there are aspects of the analysis presented in the PRS which do not go far enough in terms of reasonable flexibility. However, these are not fundamental aspects and mainly relate to the smaller food/beverage element of the proposal. The does, however, appear to be an error in paragraphs 8.30, 8.31 and 8.32 of PRS whereby the minimum sizes in paragraphs 8.30 and 8.31 do not add correctly to result in the figure in 8.32. In light of our views, expressed above, in relation to flexibility, we consider that a minimum site size of 0.91ha is reasonable for the purposes of assessing alternative locations.

The alternative sites considered by the PRS

3.48 The PRS assesses four alternative locations in Port Talbot¹¹. Our assessment of each is contained below.

Glanafan School

3.49 This site lies in a sequentially preferable location to the application site, but is not considered to be available given its recent redevelopment / refurbishment for residential and commercial uses. The applicant’s assessment dismisses this area on suitability grounds, particularly in relation to accessibility factors, with reference to the content of the LDP allocation which acknowledges the poor levels of linkage

Harbourside

- 3.50 The Harbourside allocation comprises a large area of land to the south of Port Talbot town centre. The allocation, in the adopted LDP, includes provision for bulky comparison goods uses, but not foodstore use. In addition, the LDP also acknowledges faced by the allocated site in terms of linkages with the defined town centre area.
- 3.51 These constraints are highlighted by the PRS and the Harbourside site is dismissed on the basis of its accessibility characteristics, availability of parts of the site and its location in relation to the town centre when compared with the application site.

¹¹ See Table 1 in Section 8 of the PRS

Superseded

- 3.52 In our view, whilst the Harbourside allocation is clearly large enough to accommodate the proposal, the key questions will be whether any part of the allocation provides a location which is sequentially preferable to the application and, if so, whether it is a suitable and available alternative. In our opinion, only the northern part of Harbourside allocation is sequentially preferable: that part of the site which lies to the north of the A4241. The edge of this area is circa 300 metres walk from the southern boundary of the town centre, compared with 500 metres for the application site. However, this part of the Harbourside site can be discounted on the basis that it is not currently available for redevelopment.

Land at Baglan Primary School

- 3.53 This site, which is in a sequentially preferable location to the application site and part of the primary catchment area of the proposed development, can be discounted on the basis that it is protected open space and not available for development for an alternative use.

Former Wilko, Aberfan Shopping Centre

- 3.54 The applicant's PRS dismisses the former Wilko retail unit within the Aberfan Shopping Centre on a basis of a number of separate reasons, including lack of adjacent car parking provision and the format of the unit. Whilst this existing retail unit lies in a sequentially preferable location to the application site and, in totality, is large enough to accommodate the proposed foodstore, is not suitable for the reasons outlined by AY in its PRS document.

Additional Sites

- 3.55 In response to the letter of objection from Morrisons, two further locations are considered within the RA document: the existing ALDI store and adjacent land to the east and west, plus the Bethany Square / Station Road car parks (and surrounding land).
- 3.56 With regards to the car parks and surrounding land (referred to as Site 5 by the Morrisons objection), we agree with AY that the full extent of the site is not made clear. However, the two church buildings which are referred to are in use and do not appear to be available. The main focus for Site 5 are the two surface level car parking areas, to the north of the A48 and south of Station Road. These two parcels represent a reasonably large area although, as AY highlight, they are split into two parts by a roundabout and highway infrastructure. Given the connections that this highway infrastructure provides, it is likely to be very difficult to remove this barrier and amalgamate both parcels. In addition, the car parks do not appear to be available for redevelopment. Overall, we agree with AY that the Bethany Square / Station Road area does not provide a suitable and available alternative for the proposed development.
- 3.57 Site 6 referred to in the Morrisons objection centres upon the existing ALDI store on Commercial Road, along with the adjacent fire service and WM Glazing sites. We agree with Morrisons that Site 6 is worthy of consideration within the sequential test on the basis that ALDI, the applicant for the Afan Way, is clearly attempting to improve its retail offer for the local community in Port Talbot.
- 3.58 One way of achieving this objective is to open the proposed store at Afan Way, which would be circa size the size, in net sales area terms, as the existing store at Commercial Road. However, AY do not suggest that this is the only option. Therefore, consideration should be given to the expansion of the existing store in order to alleviate the issues outlined in the PRS. This may be through an extension of the existing store or through redevelopment of the existing wider site.
- 3.59 In both scenarios this would require adjacent land and, given the orientation of the existing ALDI store, it would appear that redevelopment is likely to be the more sensible option than an extension to the existing unit. The Morrisons objection has identified the adjacent fire service and WM Glazing sites as potential expansion areas. Both of these sites are in use

Superseded

and, therefore, on face value, are not available. It is also unlikely that, even if adjacent land were to be available, that an enlarged foodstore could be accommodated alongside the food/beverage unit.

- 3.60 Therefore, it may possible to reach a conclusion that the expansion / redevelopment of the existing ALDI store at Taibach is not a suitable and available alternative, although further evidence on the availability of the adjacent land would clearly strengthen this conclusion.

Conclusions

- 3.61 Having assessed the four alternative locations included within the applicant's PRS, along with the two additional locations raised within the objection from Morrisons, we have reached the conclusion that five out of these six sites are not suitable and / or available alternatives. This may also be the correct conclusion for the remaining sixth site although such a conclusion could be supported by further evidence from the applicant.

Impact

- 3.62 The final retail / town centre policy test for this application is an assessment of the likely impact of the proposed development on nearby defined 'town centres'. Policy R3 of the LDP seeks to ensure that the vitality and viability of existing retail centres will not be undermined by proposed retail development outside of defined town centres, whilst PPW12 requires impact assessments to consider whether proposed retail development is likely to have detrimental consequence for the viability and vibrancy of town centres. TAN4 expands upon PPW12 by asking impact assessments to consider a range of factors, including:

1. Impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area.
2. Impact of the proposal on centre vitality and viability, including local consumer choice and range and quality of the comparison and convenience retail offer.
3. Consideration of the cumulative effects of the development proposal in relation to any outstanding planning permissions.
4. Impact of the proposal on in centre trade and turnover in the centre and other centres in the wider area, taking account of current and future consumer expenditure capacity in the catchment area.

- 3.63 Section 9 of the applicant's PRS document acknowledges the various impact considerations within PPW12 and is structured accordingly. A key part of the overall assessment of the likely impact of the proposed development is a quantitative assessment of financial impact. This is provided by the PRS and supplemented by additional analysis in the RA document. We consider this aspect first, before moving on to the wider considerations regarding town centre impacts.

Financial impact assessment

- 3.64 As a starting point, it should be noted that the applicant's financial impact assessment concentrates upon the convenience goods floorspace element of the proposed foodstore. This is understandable, as this element of floorspace comprises the majority of the proposal. We consider this to be a reasonable approach, which is supplemented by the inclusion of the other elements (comparison goods floorspace and the food/beverage unit) within the wider assessment of impact.
- 3.65 The applicant's original assessment of the likely financial impact of the proposed development is contained in Appendix V of the PRS. This has been updated within the RA document in order to expand the analysis to take into account the closure of the Iceland store in Port Talbot town centre and the M&S store in Neath. Both assessments follow a similar structure, but, for the avoidance of doubt, we have concentrated our assessment on the version within the RA document.

Superseded

- 3.66 We have already commented upon the various data inputs and assumptions used by AY in its quantitative need assessment, which shares much of its data with the financial impact assessment. As will be noted from our advice earlier in this section, the assessment presented by AY in Tables 1-5 provides a robust basis for the quantitative financial assessment.
- 3.67 Tables 7-10 at Appendix I of the RA provide the applicant’s updated assessment of the financial impact of the proposed convenience goods floorspace. These tables are structured as follows:
- a. Table 7 – forecast pattern of trade draw to the convenience goods element of the proposed foodstore.
 - b. Table 8 – re-allocation of convenience goods expenditure associated with the closure of the Iceland (Port Talbot) and M&S (Neath), along with an assessment of the pattern of trade diversion from existing stores to the proposed ALDI at Afan way.
 - c. Table 9 – assessment of the solus impact of the proposed ALDI store at Afan Way on existing stores in Port Talbot, Neath and the surrounding area (post closure of Iceland and M&S stores)
 - d. Table 10 – assessment of the pre-ALDI and post-ALDI trading performance of stores in the Port Talbot area.
- 3.68 Within Table 8, AY re-distribute convenience trade to take into account the recent closure of the Iceland store in Port Talbot town centre and the M&S store in Neath. The inclusion of this exercise in AY’s updated assessment is, in principle, welcomed. It is to be noted, however, that AY do not provide a cumulative impact assessment of the proposed ALDI store alongside these two closures. Presumably, this is because TAN4, which is a material consideration, refers to cumulative impact assessments in the context of ‘outstanding planning permissions’ and the Iceland / M&S closures do not fall within this category. However, we consider that it would be incorrect to ignore these recent changes in provision completely (particularly the closure of the Iceland store) and this issue is returned to later in this section.
- 3.69 We agree with the contents of Table 8 in relation to the closure of the M&S store in Neath, particularly in relation to the re-distribution of trade amongst some stores in Neath itself and also to stores (including other M&S stores) further afield. We agree that the closure of M&S is unlikely to have affected convenience goods store turnover levels in Port Talbot.
- 3.70 Table 3.1 below provide a summary of AY’s forecast re-distribution of trade following the closure of the town centre Iceland store in Port Talbot. As can be seen, AY have re-distributed convenience goods expenditure to just four stores in Port Talbot, with three out of four of these being within the town centre. These three stores (Tesco, B&M and Home Bargains) are predicted to gain 90% of the expenditure formerly associated with Iceland. AY suggest that only 10% of the former Iceland’s turnover will be re-directed to the new Iceland Food Warehouse in Port Talbot.

Table 3.1: AY’s forecast pattern of convenience goods trade re-distribution

Store	Change in Turnover (£m)	% of former Iceland Turnover
<i>Iceland, Port Talbot town centre</i>	<i>£2.37m</i>	<i>100%</i>
B&M, Port Talbot town centre	+£0.71m	30%
Home Bargains, Port Talbot town centre	£0.71m	30%
Tesco, Port Talbot town centre	£0.71m	30%
Iceland Food Warehouse	£0.24m	10%

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- 3.71 In our view, this forecast re-distribution of trade does not appear logical. Whilst there may well be a tendency for some Iceland customers to remain within Port Talbot town centre in order to perform their frozen food shopping, there is a need to consider the extent of this behaviour bearing in mind: (a) the extent of the remaining frozen food offer in the town centre’s convenience goods sector; and (b) the fact that the closure of the town centre Iceland was associated with a similar but larger Iceland elsewhere in Port Talbot.
- 3.72 In relation to these issues, it is entirely reasonable that a large proportion of town centre Iceland store customers would transfer their shopping trips to a more modern and larger Iceland elsewhere in Port Talbot, due to both brand loyalty and the type of retail offer. Moreover, whilst AY’s analysis is structured to assume that the Food Warehouse store opened before the town centre store closed, which itself is an impact which needs to be taken into account, it does not appear reasonable to assume that only 10% of the remaining town centre turnover would transfer to the similar out of centre store. This is also reinforced by the retail offer of remaining town centre grocery stores (Tesco, B&M and Home Bargains) where Tesco is the only store to provide a comparable offer.
- 3.73 Table 8 also provides AY’s assessment of the pattern of trade diversion, on a zone by zone basis, to the convenience goods element of the proposed ALDI store at Afan Way. This is informed by the content of Table 7 of the RA which suggests that 80% of the proposed store’s convenience goods turnover will come from residents of Zone 1 of the study area, with a further 5% from Zone 2 residents and 15% from Zone 3. No allowance is made for store turnover to be derived from expenditure flowing into the study area from outside. This latter assumption is considered to be robust.
- 3.74 We have compared AY’s forecast trade draw for the proposed store against the pattern of trade draw of the existing main foodstores/supermarkets in Port Talbot¹² (with data taken from the applicant’s 2023 household survey), with the results shown in Table 3.2 below.

Table 3.2: comparison between Avison Young trade draw forecast for proposed ALDI and existing 2023 household

	Zone 1	Zone 2	Zone 3
Avison Young trade draw forecast	80%	5%	15%
2023 household survey data	73%	6%	21%

- 3.75 As can be seen, the AY forecast for the proposed foodstore is very similar to the existing pattern of draw of existing stores (combined), with only a small difference between Zones 1 and 3. Given the location of the proposed store we consider at AY’s forecasts are reasonable for the purposes of the financial impact assessment.
- 3.76 Table 9 provides an overview of AY’s forecast pattern of (convenience goods expenditure) trade diversion to the proposed ALDI store. This indicates that AY are predicting that 78% of the foodstore’s convenience goods turnover will be diverted from other existing foodstores in Port Talbot, 2% from Neath town centre, 2% from the Lidl store at Briton Ferry, 1% from the ASDA at Pyle and 16% from foodstores located outside of the study area.
- 3.77 Based upon the contents of AY’s Table 9, 26% of the proposed store’s turnover will be diverted from the town centre, 17% from the existing ALDI store, 2% from local shopping facilities and 32% of the three large out of centre foodstores in the town¹³.

¹² Tesco, ALDI, Lidl, Morrisons and Iceland
¹³ Morrisons (15%), Lidl (14.2%) and Iceland (2.5%)

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- 3.78 In order to properly consider whether these overall levels of diversion are reasonable, it is important to consider this diversion on a zone by zone basis. This data is provided in Table 8 in Appendix I of the RA document and shows similar proportions of diversion across each of the three zones with a small number of notable exceptions. These are:
- a. The proposed ALDI will have a slightly lower level of influence on those Zone 2 residents who are already undertaking their food shopping in Port Talbot (with a consequentially higher level of influence on residents of Zone 2 who are current visiting stores in Neath for their food shopping).
 - b. The proposed ALDI is forecast to have a greater proportionate on existing Lidl (Port Talbot) shoppers living in Zone 1 than Zone 3, which is no doubt due to the comparative locations of the existing Lidl and ALDI stores and the proposed new ALDI store.
- 3.79 Table 9 indicates that 80% of those residents of Zone 1 who will use the new ALDI store are already using stores in the town for food shopping. The remaining 20% of trips attracted from Zone 1 residents will be diverted trips from stores outside of the town. According to Table 9 of the RA, this includes stores in Neath, Maesteg and Swansea. For those residents of Zone 3 who are predicted to use the proposed new ALDI store, Table 9 indicates that 74% of this group are already using stores in Port Talbot whilst 26% are using convenience goods stores elsewhere (again, Neath, Maesteg and Swansea, plus Pyle and Bridgend).
- 3.80 Overall, whilst we agree with AY that there are likely to be some differences in the pattern of diversion from stores in Port Talbot, depending upon the origin of the shopping trip (i.e. Zones 1, 2 or 3) we find it difficult to agree that around one fifth of the proposed foodstore's convenience goods turnover will be derived from stores elsewhere. Port Talbot has a mature grocery shopping sector, with a wide range of provision which is reflected in high levels of existing retention. The proposed ALDI store at Afan Way, whilst clearly a significant improvement over the existing ALDI on Commercial Road, is unlikely to offer anything significantly different to existing provision.
- 3.81 A further question mark surrounds the proportionate pattern of forecast diversion from the larger foodstores in Port Talbot amongst Zone 1 residents. In particular, whilst an objective for ALDI will unsurprisingly be to take local market share away from its competitors (Tesco, Lidl and Morrisons), it does not appear reasonable for a higher level of proportionate diversion to be placed on the town centre Tesco than the existing ALDI and also similar levels of diversion from Morrisons and Lidl (when compared to the existing ALDI).
- 3.82 As a consequence of these concerns, we consider it appropriate to re-consider part of the applicant's financial impact assessment. In particular, we have adopted a large part of AY's baseline data and concentrated upon the following re-assessment:
- a. Re-consideration of the pattern of expenditure re-distribution following the closure of the Port Talbot town centre Iceland store¹⁴; and
 - b. Re-consideration of the pattern of convenience goods trade diversion to the proposed ALDI¹⁵.
- 3.83 Our own financial impact assessment is contained at Appendix B to this advice report and is based upon the following structure and data sources:
- a. Our assessment has been structured into the following main stages:

¹⁴ And also, for completeness, the closure of the M&S store in Neath town centre (although this change is not expected to have a material impact on convenience goods shopping patterns in Port Talbot).

¹⁵ Using the forecast pattern of trade draw provided by Table 7 of the AY RA document.

Superseded

1. Tables 1-5 outline the market share and turnover levels of existing stores and centres across the study area. In order to contribute to our assessments of both solus and cumulative impact, these tables show market share and associated turnover levels prior to the closure of the Iceland in Port Talbot town centre and the M&S in Neath town centre.
 2. Tables 6-9 provide our assessment of the re-distribution of expenditure to other existing stores following the closure of the Iceland store in Port Talbot
 3. A similar exercise is undertaken in Table 10-13 in relation to the recent closure of the M&S store in Neath town centre.
 4. Tables 14-16 provide an assessment of the pattern of trade draw to the proposed ALDI store and the pattern of trade diversion from existing stores and centres in the local area. Table 16 provides an assessment of the likely monetary and proportionate impact of the convenience goods element of the proposed ALDI store, on both a solus and cumulative basis.
- b. For the avoidance of doubt, our own assessment utilises the same data sources and assumptions as the AY assessment in relation to the following areas:
1. The total amount of convenience goods expenditure within each of the three study area zones.
 2. The split of expenditure between first and second choice main and top-up food shopping.
 3. The market share of existing convenience goods shopping destinations prior to the closure of the Iceland and M&S stores.
 4. The pattern of forecast of trade draw to the proposed ALDI foodstore.
- c. The areas where our assessment, and the assessment provided by AY in the RA, depart are in relation to the re-distribution of trade following the closure of the M&S and Iceland stores and the pattern of trade diversion to the proposed ALDI store. In addition, we have updated the turnover calculations for the proposed ALDI store using the latest sales density information from GlobalData.
- 3.84 Table 3.3 below provides a summary of our impact, focusing upon the pattern of diversion from existing facilities in Port Talbot, along with the scale of diversion from the surrounding area. For comparison purposes, these estimates are placed alongside the estimates provided by AY in their RA document. All of the estimates given relate to the solus impact of the proposed ALDI store.

Superseded

Table 3.3: forecast convenience goods impact of proposed ALDI store, Port Talbot – comparison between Avison Young and Nexus forecasts

Store / Centre	Avison Young (£m) diversion	Avison Young % impact	Nexus (£m) diversion	Nexus % impact
B&M	-	-	£0.01m	-1.4%
Home Bargains	-	-	£0.01m	-1.4%
Tesco	£3.03m	-9.7%	£2.88m	-9.2%
Local shops	£0.1m	-3.4%	£0.04m	-1.3%
Port Talbot town centre	£3.1m	-8.5%	£2.94m	-8.3%
ALDI, Commercial Road	£2.01m	-13.8%	£6.43m	-43.9%
Filco, Commercial Road	-	-	£0.01m	-0.9%
Commercial Road district centre	£2.01m	-12.9%	£6.44m	-41.2%
Out of centre stores, Port Talbot				
Lidl, Baglan	£1.71m	-19.2%	£1.24m	-13.9%
Morrisons, Baglan	£1.81m	-7.6%	£1.10m	-4.6%
Iceland, Baglan	£0.3m	-7.5%	£0.43m	-8.9%
Neath	£0.49m		£0.15m	
Other	£2.18m		£0.36m	

- 3.85 As the contents of Table 3.3 above show, across many areas the main sources of convenience goods trade diversion in both our and AY’s are similar. This includes a similar level of expenditure being diverted from stores in Port Talbot town centre (focusing on the Tesco store), a large proportion of expenditure being diverted from out of centre stores in Port Talbot. However, there are two main areas of difference: the amount of money which AY forecast is being diverted from stores outside of the study area (such stores in parts of Neath, Swansea, Maesteg and Bridgend), along with the amount of expenditure diverted from the nearby existing ALDI store in Port Talbot.
- 3.86 In our view, the proportions associated with these two areas do not appear to be logical. In particular, AY’s assessment is suggesting that the same proportion / amount of trade will be drawn from stores in settlements a considerable distance away from Port Talbot as the amount of trade drawn from an existing store, also operated by ALDI, which is close to the application site. This is compounded by the current picture for convenience goods shopping patters in the study area and the good existing quality and range of convenience goods retail provision in the local area.
- 3.87 As a consequence, we consider that there will be a much higher level of diversion from the existing ALDI store in Port Talbot. This is also raised by the objection from Morrisons, a point with which we agree.
- 3.88 Whilst we accept that the current ALDI store has a number of limitations, it seems entirely reasonable that existing ALDI customers will switch to the new store given that it will be a modern, better quality store, with a wider product range, in a location which is a reasonably short distance from the existing store. These are likely to be significant factors in

Superseded

attracting existing ALDI customers to switch to the new store. We therefore consider that it is entirely reasonable to allow for a much larger transferal trade between stores, with a circa 44% loss of trade from the existing store. This is a significant loss of trade

3.89 One consequence of revising the amount of trade to be diverted from the existing ALDI store, along with maintaining a reasonably large level of diversion from other large stores in Port Talbot, is that there will be, in our opinion, a much lower level of diversion from stores in Neath, Bridgend, Swansea and Maesteg. Whilst stores in these settlements do attract some convenience goods trips from residents of the study area, they do so in relatively small amounts. Given the qualitative aspects of existing provision in the Port Talbot area, it therefore appears unlikely that a large amount of expenditure will be diverted from these other settlements. This is also raised within the objection from Morrisons and we agree with the suggestion, by Peacock & Smith (on behalf of Morrisons), that the level diversion from these settlements will be much lower.

3.90 Therefore, based upon the above analysis, and supported by the contents of our Appendix B, the two key elements of the forecast convenience goods impact of the proposal are:

- a. A -8.3% solus impact upon the convenience goods sector in Port Talbot town centre; and
- b. A -41.2% solus impact upon the convenience goods sector in Taibach district centre.

3.91 As shown in Table 16 in our Appendix B, the cumulative impact of the proposed ALDI foodstore, when considered alongside the recent closure of the town centre Iceland store, will be a -12.2% effect on Port Talbot's convenience goods sector. In order to arrive at this cumulative impact forecast, it should be noted that: (A) the AY assessment does not provide a cumulative impact estimate for the town centre; and (B) we consider that the closure of the Iceland store will have had a large impact upon the town centre's convenience goods turnover level than has been estimated by AY. These financial effects are now taken forward into our wider assessment of the proposal on the health of the town and district centres.

3.92 Given that the impact test relates to the likely impact on surrounding defined town centres as a whole, it will be important to consider, where possible, the other financial impacts associated with the proposed development. As noted earlier in this advice report, it may not be appropriate to conduct a detailed assessment of the likely impact of the comparison goods element of the proposed store (given that it only accounts for 20% of the proposed foodstore's sales area). However, the inclusion of comparison goods sales within the proposed foodstore will have a trading impact and it will be important to consider whether any of this impact will fall on defined 'town centres'. As a consequence, we have, in the absence of an assessment from the applicant, undertaken our own analysis which uses the results of the applicant's household survey to estimate the turnover of Port Talbot town centre and Taibach district centre¹⁶.

3.93 This assessment is undertaken at Table 18 at Appendix B and shows that:

- a. Based upon 5% of the proposed store's comparison goods turnover being diverted from the town centre, this will result in a very small -0.1% impact upon the town centre's 2029 turnover levels.
- b. Taibach district centre is expected to receive an impact of -30% on its 2029 comparison goods turnover level, based upon 20% of the proposed store's comparison goods turnover being diverted from this centre¹⁷.

¹⁶ For the avoidance of doubt, a similar assessment for the proposed food/beverage unit cannot be undertaken given the lack of available market share data from the applicant's household survey.

¹⁷ A forecast which takes into account the likelihood that, alongside a large diversion of convenience goods trade to the proposed store, the existing ALDI store will lose a sizeable amount of its comparison goods turnover to the proposed store.

Superseded

- 3.94 Table 18 at Appendix B then combines the convenience and comparison goods trade diversion forecasts in order to provide an overall forecast impact on the Class A1 retail sectors in Port Talbot town centre and Taibach district centre. Table 18 indicates the following overall financial impact levels:
- a. Overall, the proposed ALDI will have a -3.6% impact upon the Class A1 (convenience and comparison goods) retail turnover of Port Talbot town centre, which will rise to -5.6% when the recent closure of the Iceland store is taken into account.
 - b. The opening of the proposed ALDI store on the application site is likely, in our opinion, to lead to a circa -41% impact upon the retail turnover of Taibach district centre, which will be focused upon both the convenience and comparison goods turnover levels of the existing ALDI store on Commercia Road.

Wider assessment of impact on town centre vitality and viability

- 3.95 Looking beyond the direct financial impact of the proposed foodstore, an assessment of the overall impact of the proposed development on defined 'town centres' should also consider wider factors such as the health of these centres, the scale of trading overlap between the two locations, the impact of the proposed food and beverage unit and the potential effect on linked trips.
- 3.96 Looking, first, at Port Talbot town centre, the PRS provides a review of the key characteristics of the centre, including a land use profile which is heavily orientated towards the provision of comparison goods retail and service uses in the centre. These two categories account for around three-quarters of all units in the town centre, with only 8 convenience goods retailers (4% of all units). It should be noted that these figures, provided by AY, are based upon a land use survey of the town centre undertaken in June 2023, which is not, therefore, particularly up to date.
- 3.97 On face value, these figures would suggest that the majority of town centre retail and service uses do not have a particularly significant overlap with the proposed store. In addition, whilst it is important to note that the proposed food/beverage unit will also have an overlap with part of the service sector within the town centre, the scale of competition is minimised in relation to this element of the proposal given that it only relates to one proposed small unit.
- 3.98 Apart from the level of trading overlap between the proposal and the town centre in terms of the range of different types of uses in the centre, it is equally as important to consider the scale of overlap in terms of the contribution that the various types of retail and service uses make to the overall performance and attractiveness of the centre. On this issue, the applicant's PRS does not provide any information on the main purpose of visits to the town centre. However, use of the applicant's 2023 household survey enables our assessment to consider the financial contrition of the different parts of the retail sector. As noted in our financial impact assessment, the convenience and comparison goods sectors contribute a similar amount of expenditure to the annual turnover of the centre (£37.2m for convenience goods and £44.7m for comparison goods). This illustrates that the much smaller number of convenience goods retailers in the centre make a disproportionately higher contribution to the financial performance of the centre. Whilst the average spent per trip will be an important additional consideration, it is entirely possible that the town centre's convenience good sector makes a significant contribution to the overall number of visits to the centre.
- 3.99 Therefore, based upon the above, the loss of convenience goods shopping trips from the centre will be an important factor to be taken into account in the overall assessment of impact. Indeed, given the potential for the proposed store to remove 8% of the centre's convenience goods turnover, which is equivalent to £1 in every £12.5 spent on convenience goods in the centre, this is a clear negative of the proposed development. In addition, the comparison goods element of the proposed foodstore and the food/beverage unit have the potential to divert trade away from the centre, however this is considered to be very small and not, on its own, a particular cause for concern.

Superseded

- 3.100 These direct impacts should be set alongside the range of indirect impacts associated with the proposed development. A key aspect here will be the effect on linked trips. In relation to the issue of linked trips, the applicant's PRS suggests that the proposed development will have a positive relationship with Port Talbot town centre¹⁸.
- 3.101 In order to fully understand the issue of linked trips it will be important to consider both the potential of linkages with the proposed development and also the current extent of linkages between stores similar to the proposed foodstore and the town centre. A similar assessment should also be undertaken in relation to Taibach district centre, particularly given the extent of forecast trade diversion from the existing ALDI store.
- 3.102 In order to undertake this assessment, AY have been asked to provide a series of cross-tabulations from the results of the applicant's household survey. The survey sought information on the propensity for linked trips associated with main and top-up food shopping trips, both in terms of the last trip and the time before that. A summary of the data provided by AY is provided at Appendix C to this advice report, which indicates the following:
- a. With regards to the propensity to undertake linked trips, the survey indicates that there is a slightly stronger trends associated with the town centre Tesco supermarket in Port Talbot then the ALDI and out of centre foodstores/supermarkets. However, there is no obvious / significant difference between the district centre ALDI store and the out of centre Iceland, Morrisons and Lidl stores.
 - b. In relation to the destination of linked trips, it is notable that main food shoppers at the existing ALDI store on Commercial Road are more likely to visit facilities in Port Talbot town centre as part of a linked trip than they are in relation to Taibach district centre. In addition, whilst linkages between out of centre stores and the town centre occur, they are at a lower proportionate level than linkages associated with the Tesco store.
 - c. The only store to provide notable linked trips with Taibach district centre is the existing ALDI (located within the centre), although these only occur in relation to the last main food shopping trip undertaken by survey respondents.
- 3.103 The above information supports the view that there are, unsurprisingly, particular benefits in terms of the 'town centres first' approach advocated by national and local planning policy, with the town centre Tesco store seemingly more likely to generate linked trips with Port Talbot town centre. However, it is also clear that the existing ALDI and the main out of centre foodstores in Port Talbot also have a relationship with the town centre in terms of linked trips. Such a pattern of behaviour has the potential to lessen part of the overall impact, although it is unlikely to completely counter-act the direct impacts of the proposal.
- 3.104 All of the above factors should be brought together in an overall assessment of the likely impact of the proposed development. In addition to the need to take into account all of these factors, it will be important to bear in mind the content of development plan and material national planning policy on 'impact' issues. Policy R3 of the LDP indicates that *inter alia* out of centre retail development proposals will only be permitted where *"the vitality and viability of existing retail centres will not be undermined taking into account the cumulative effects of other approved retail developments, recently completed developments and plan commitments"*¹⁹. PPW12 notes that the purpose of impact assessments is to consider and determine whether proposed developments outside of existing centres *"are likely to have detrimental consequences"*.

¹⁸ See paragraphs 7.34 and 9.24 of the PRS

¹⁹ Our emphasis

Superseded

3.105 In our view, based upon the above factors, it is our view the proposed development will not lead to significant detrimental consequences for Port Talbot town centre and / or undermine its health to any significant extent. Instead, there will be more minor impacts in both of these areas. This is based upon a balance of number of factors, including:

- a. A clear headline factor in our assessment is the loss of 8% of the centre's convenience goods turnover or 3.6% of its overall retail turnover. This is not insignificant and will lead to the loss of a reasonably large amount of expenditure from a land use sector which, based upon the available evidence, is a key contributor to the role and function of the centre.
- b. Whilst the health of the town centre does not appear to be particularly poor, it is notable that there has been a material rise in the number of vacancies in the centre since the completion of the 2013 Retail Study, whilst the centre has recently lost a key convenience goods retailer – Iceland – following its relocation to a large out of centre location. These factors give the centre some vulnerability, which will reinforce the potential for the proposed development to undermine its overall health.
- c. The potential impact of the comparison goods element of the proposed foodstore, along with the food/beverage unit, has also been taken into account, although we do not consider that, on their own, they are likely to affect the health of the town centre.
- d. The likelihood that the proposed development will still have a relationship with the town centre via linked trips, as evidenced by the experience of existing foodstores across Port Talbot. Such a relationship will not, in our opinion completely counter-balance the direct impact of the proposed development, but is likely to soften the overall impact to a certain extent.

3.106 The other defined centre in Port Talbot which requires careful consideration is Taibach district centre. The main reason for this is due to the presence of an existing ALDI store. The key 'headlines' for an appropriate assessment of this centre are:

- a. According to the results of the 2023 household survey, the existing ALDI store trades well and above the national average company performance level. This is due to not only a reasonable level of convenience goods expenditure being attracted to the store, but also its small size²⁰ when compared to the new store which ALDI wishes to open at Afan Way.
- b. It is AY's own view that the ALDI store generates linked trips with the wider service offer of the centre. The 2023 household survey sought to collect data on linked trips associated with main and top-up food shopping although this data has not been utilised by AY in order to substantiate its claims made in relation to the existing ALDI store. However, our own analysis, based upon evidence base data provide by AY in January 2025, indicates that there is a relationship between the ALDI store and the remainder of the centre.
- c. Whilst the PRS suggests that the Afan Way store will be ALDI's second store in Port Talbot, and this is the basis for the AY financial impact assessment, the applicant's supporting information is not categoric in this regard.

3.107 In our view, AY have significantly under-estimated the amount of trade diversion which will occur from the existing ALDI store to the proposed new ALDI store. As noted earlier in our advice report, it is unreasonable for AY to suggest that the proposed ALDI will have the same level of trade diversion from the Commercial Road store as stores in Swansea, Bridgend,

²⁰ Paragraph 9.77 of the PRS indicates that the existing ALDI store has a net sales area of 995sq m, which can be compared to the proposed store's net sales area of 1,356sq m.

Superseded

Maesteg and Neath. In our view, the Commercial Road store will lose a significant element of its trade to a new ALDI store which is only a short distance away and its much larger in size.

3.108 This scale of impact leads to the inevitable question of whether the existing ALDI store will remain open, which is relevant material consideration given the location of the store within the defined district centre. In our opinion, there are significant concerns for the future of the existing ALDI store, based upon three factors:

- a. The scale of the forecast trade loss from the existing store is significant. On the basis of the survey-derived pre-impact turnover, the predicted loss is -44%. In financial terms, the loss is £6.4m. This would leave the Commercial Road store trading slightly under average company performance levels. If the Commercial Road store was the only ALDI in Port Talbot, this may not necessarily be a particular cause for concern, although this is not the case for the purposes of this assessment. In our opinion, the scale of trade loss and the resultant turnover, are material factors to be taken into account.
- b. A further important factor is the relative position of the two locations. The existing store lies in the eastern part of the Port Talbot urban area, whilst the proposed store lies centrally. The stores would only be a circa 1.4 miles apart, which is, in our opinion, a relatively short distance in the context of a settlement such as Port Talbot. It is also possible that both locations will have a large overlap in terms of 5 minute drive-time catchments, a concept which AY appear keen to emphasise. As a consequence, this raises some additional doubts as to whether there is any advantage for ALDI in operating two stores so close together.
- c. In addition, there do not appear to be any obvious advantages for ALDI in operating both the existing and proposed stores. One of the stores would not meet its current business requirements, which AY are keen to emphasise in Sections 4 and 8 of the PRS. It would also lie in an inferior location and have a materially smaller retail offer than the proposed store. These factors are compounded by the proximity of both locations.

3.109 Overall, we have reached the conclusion that, based upon the available evidence, there is a reasonable possibility that the existing ALDI store on Commercial Road may close as a consequence of the proposed ALDI at Burrows Yard gaining planning permission and being constructed. In our view, the existing ALDI store plays an anchor role for Taibach district centre, which is a defined 'town centre' in the LDP retail hierarchy. The district centre is therefore afforded policy protection and we consider that the loss of the ALDI store would have detrimental consequences and undermine the vitality and viability of the centre (along with existing investment within the centre).

3.110 Should an alternative scenario be played out, whereby the existing ALDI remains open, we consider that the scale of these detrimental consequences would be reduced, although it would remain the case that the vitality and viability of the district centre would be undermined (due to the scale of trade / shopping trip loss from the centre).

Other impact considerations

3.111 Beyond the assessment of the likely impact of the proposed development on defined 'town centres' in the local area, PPW12 also asks for an assessment of the likely on allocated sites outside of centres. As set out in paragraph 9.11 of the PRS, there are two sites in Port Talbot which are allocated for retail development in the adopted LDP: Glanafan School and Harbourside. Paragraph 9.11 of the PRS appears to adopt an approach which considers whether either of these locations can either accommodate a foodstore similar in scale to the proposed development or their availability for development. This does not necessarily appear to be the correct approach when considering this national policy test, as a proper analysis would consider whether investment decisions at these locations (in line with the LDP allocation) would be materially affected by the proposed development at Afan Way. In our view, the level of material overlap between the proposed development and the proposed foodstore and food/beverage unit is low and, as a consequence, future

Superseded

investment decisions are likely to be unaffected by a decision by NPTCBC to grant planning permission for the Afan Way proposal (and its subsequent implementation).

Conclusions

- 3.112 Based upon the foregoing analysis, it is our view the impact assessment provided by the applicant has under-estimated the likely impact of the proposed development on the health of, and investment within, Port Talbot town centre and also Taibach district centre. In particular, the cumulative financial impacts associated with the town centre and the direct (individual) impact of the proposal on the district centre will be higher, which should be placed alongside the characteristics of the health, role and function of these centres.
- 3.113 National planning policy asks local authorities to assess whether out of centre retail proposals will have detrimental consequences for the health of town centres, whilst the LDP indicates that proposals will only be permitted where they do not undermine the vitality and viability of 'town centres' in the local retail hierarchy. In our view, there is a potential scenario where the existing ALDI store at Taibach district centre will be lost and, should this occur, the health of the centre will be undermined, leading to detrimental consequences. Should the ALDI remain open, this scale of impact would be reduced, although the scale of trade loss would still, in our opinion, lead to the health of the centre being undermined.
- 3.114 The potential impacts upon the health of, and investment within, Port Talbot town centre are, in our view, less significant, although the centre has recently lost its second largest foodstore and the proposed development would remove around 8% of its convenience goods trade. The overall impact of the proposal would be softened to a small extent by evidence which suggests that linked trips between out of centre foodstores and the town centre will still occur, although we recommend that the Council place still classify the proposal as having a minor undermining / detrimental impact on the health of the town centre.

4. Summary and Conclusions

4.1 This report has been prepared by Nexus Planning for Neath Port Talbot County Borough Council in relation to a planning application for the redevelopment of land at Burrows Yard, Afan Way in Port Talbot for the following description of development:

“Mixed use development comprising a foodstore and coffee shop with drive thru together with associated access, car parking, external lighting, drainage, landscaping, and other associated site works.”

4.2 The planning application has been given reference number P2024/0339.

4.3 At the request of NPTCBC officers, Nexus have been instructed to provide written advice on a range of retail and town centre planning policy matters, including:

- a. The need for the proposed development;
- b. The relationship of the proposal with the sequential test; and
- c. The likely impact of the proposed development on nearby defined ‘town centres’.

Need

4.4 The requirement to demonstrate a need for retail proposals located outside of defined ‘town centres’ is a key element of the development plan and national planning policy, with national policy indicating that quantitative factors should take precedence over qualitative factors.

4.5 Our review of the applicant’s quantitative need assessment, has found that it is based upon a robust set of evidence base information and, following, a minor re-assessment in order to include the latest data on average grocery store performance levels, we have reached the conclusion that there is a quantitative need for the proposed foodstore.

4.6 In relation to qualitative need factors, we consider that the proposed foodstore will make an improvement to convenience goods provision in the Port Talbot area, by providing modern medium-sized foodstore. However, the scale of qualitative benefit which can be afforded to the proposed development is, in our opinion, tempered by the lack of any current qualitative deficiency in convenience goods retail floorspace provision in the local area and also the absence of supporting information for some of the benefits claimed by AY. In addition, there will also be minor positive benefits associated with the food/beverage unit of the proposal.

4.7 Therefore, we consider that the proposed development meets the provisions of Part 1 of Policy R3 of the LDP.

The Sequential Test

4.8 Having assessed the four alternative locations included within the applicant’s PRS, along with the two additional locations raised within the objection from Morrisons, we have reached the conclusion that five out of these six sites are not suitable and / or available alternatives. This may also be the correct conclusion for the remaining sixth site, the existing ALDI store on Commercial Road, although such a conclusion could be supported and reinforced by further evidence from the applicant.

4.9 Therefore, we have reached the conclusion that there is no available evidence to suggest that the proposed development conflicts with Part 2 of Policy R3 of the LDP, although there is an opportunity for the applicant to reinforce this conclusion

Superseded

via the submission of additional information regarding the existing ALDI store site on Commercial Road I Taibach district centre.

Impact

- 4.10 Having undertaken a detailed assessment of the likely trading effects of the proposal, particularly the proposed foodstore, it is our view the impact assessment provided by the applicant has under-estimated the likely impact of the proposed development on the health of, and investment within, Port Talbot town centre and also Taibach district centre. In particular, the cumulative financial impacts associated with the town centre and the direct (individual) impact of the proposal on the district centre will be higher and more pronounced, which should be placed alongside the characteristics of the health, role and function of these centres.
- 4.11 National planning policy asks local authorities to assess whether out of centre retail proposals will have detrimental consequences for the health of town centres, whilst the LDP indicates that proposals will only be permitted where they do not undermine the vitality and viability of 'town centres' in the local retail hierarchy. In our view, there is a potential scenario where the existing ALDI store at Taibach district centre will be lost and, should this occur, the health of the centre will be undermined, leading to detrimental consequences. Should the ALDI remain open, this scale of impact would be reduced, although the scale of trade loss would still, in our opinion, lead to the health of the centre being undermined.
- 4.12 The potential impacts upon the health of, and investment within, Port Talbot town centre are, in our view, less significant, although the centre has recently lost its second largest foodstore and the proposed development would remove around 8% of its convenience goods trade. The overall impact of the proposal would be softened to a small extent by evidence which suggests that linked trips between out of centre foodstores and the town centre will still occur, although we recommend that the Council place still classify the proposal as having a minor undermining / detrimental impact on the health of the town centre.
- 4.13 As a consequence, we consider that there is a conflict with Part 3 of Policy R3 of the LDP, particularly in relation to the likely impact on Taibach district centre. The potential for proposal to undermine / be detrimental to the health of Port Talbot town centre is less pronounced although it is nevertheless a negative aspect of the proposal to be included in the overall planning balance.

Superseded

Appendix A: Information for ‘other’ convenience goods floorspace in Port Talbot

Superseded

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
Out of Centre												
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	0.00%	0.00%	0.54%	0.00%	0.00%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Londis, Texaco Port Talbot Service Station, Princes Margaret Way, Port Talbot, SA12 7PE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Premier, Forge Rd, Port Talbot SA13 1PG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%	0.00%	0.96%	0.00%	0.00%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.68%	0.78%	0.00%	4.58%	0.00%	0.00%
Spar, Talbot Rd, Neath SA13 1DT	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.01%	0.00%	0.40%	0.96%	0.00%	1.62%

Superseded

Appendix B: Updated financial impact assessment

TABLE 1: CONVENIENCE GOODS MARKET SHARE (%)

STORE/ CENTRE	FIRST CHOICE MAIN FOOD SHOPPING			SECOND CHOICE MAIN FOOD SHOPPING			FIRST CHOICE TOP UP FOOD SHOPPING			SECOND CHOICE TOP UP FOOD SHOPPING		
	1	2	3	1	2	3	1	2	3	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)												
Port Talbot Town Centre												
B&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 Jiwbilli, 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, Cwmafan 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												
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	0.00%	0.00%	0.54%	0.00%	0.00%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
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%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Premier, Forge Rd, Port Talbot SA13 1PG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%	0.00%	0.96%	0.00%	0.00%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.68%	0.78%	0.00%	4.58%	0.00%	0.00%
Spar, Talbot Rd, Neath SA13 1DT	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.01%	0.00%	0.40%	0.96%	0.00%	1.62%
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 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%
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%	0.93%	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, Castle Street, Maesteg, CF34 9UN	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%	0.00%	0.96%	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%
B&M, John Street, Porthcawl, CF36 3BA	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
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, lynyfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.00%	0.00%	0.00%	0.59%	0.00%	0.00%	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%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	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%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	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, Langdon Road, Swansea, SA1 8QY	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%	0.00%	0.00%	0.81%	0.00%	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, Nantyffin 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, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
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%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.00%	4.96%	0.00%	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, Cymmer village 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%
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, Neath Abbey 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%
Local shops, Pontardawe local centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	0.00%	0.00%	0.27%	0.00%	0.00%</

Superseded

NEATH PORT TALBOT COUNTY BOROUGH COUNCIL
PROPOSED ALDI FOODSTORE, BURROWS YARD, PORT TALBOT

TABLE 2: CONVENIENCE GOODS TURNOVER, 2024 (£m)

[illegible]

Superseded

NEATH PORT TALBOT COUNTY BOROUGH COUNCIL
PROPOSED ALDI FOODSTORE, BURROWS YARD, PORT TALBOT

TABLE 3: CONVENIENCE GOODS TURNOVER, 2029 (£m)

STORE/ CENTRE	FIRST CHOICE MAIN FOOD SHOPPING			SECOND CHOICE MAIN FOOD SHOPPING			FIRST CHOICE TOP UP FOOD SHOPPING			SECOND CHOICE TOP UP FOOD SHOPPING			TOTAL (£m)
	1	2	3	1	2	3	1	2	3	1	2	3	
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)													
Port Talbot Town Centre													
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.31	£0.00	£0.00	£0.14	£0.00	£0.00	£0.05	£0.00	£0.17	£0.15	£0.00	£0.00	£0.82
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.82	£0.21	£0.66	£0.36	£0.09	£0.22	£2.37
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.28	£0.00	£0.00	£0.00	£0.00	£0.03	£0.14	£0.00	£0.00	£0.06	£0.00	£0.07	£0.60
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£12.38	£0.54	£3.22	£5.50	£0.24	£1.36	£3.81	£0.06	£1.15	£1.56	£0.12	£0.61	£30.57
Local shops, Port Talbot Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.75	£0.06	£0.29	£0.69	£0.05	£0.00	£2.84
Commercial Road District Centre													
Aldi, Commercial Road, Port Talbot, SA13 1LG	£6.23	£0.39	£2.04	£2.40	£0.17	£1.09	£0.75	£0.00	£0.93	£0.33	£0.00	£0.30	£14.63
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	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.00	£0.00	£0.39	£0.00	£0.00	£0.17	£0.17	£0.00	£0.17	£0.08	£0.00	£0.02	£0.99
Fairway Sandfields, Local Centre													
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.00	£0.08	£0.00	£0.00	£0.27
Pentwyn Baglan Road, Baglan, Local Centre													
Local shops, Baglan village centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.79	£0.00	£0.00	£0.17	£0.00	£0.00	£0.96
Cwmavon, Local Centre													
Co-Op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.31	£0.00	£0.00	£0.14	£0.00	£0.00	£2.12	£0.00	£0.00	£0.94	£0.00	£0.00	£3.51
Local shops, Cwmafan village centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.10	£0.00	£0.00	£0.27
Out of Centre													
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.04	£0.00	£0.00	£0.09
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£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
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.21	£0.10	£0.36	£0.43	£0.17	£0.00	£0.73	£0.00	£0.15	£0.48	£0.00	£0.07	£3.71
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£3.49	£0.49	£0.81	£1.89	£0.09	£0.44	£0.91	£0.27	£0.15	£0.32	£0.00	£0.07	£8.92
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£10.21	£1.08	£2.66	£4.25	£0.43	£1.30	£1.98	£0.36	£0.46	£0.87	£0.10	£0.15	£23.85
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£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
Premier, Forge Rd, Port Talbot SA13 1PG	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.08	£0.00	£0.00	£0.24
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.06	£0.00	£0.36	£0.00	£0.00	£1.28
Spar, Talbot Rd, Neath SA13 1DT	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.04	£0.08	£0.00	£0.08	£0.38
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	£0.36	£0.00	£0.00	£0.23	£0.00	£0.59
Morrisons, Angel Street, Neath, SA11 1RS	£0.53	£3.76	£0.00	£0.34	£1.66	£0.00	£0.27	£0.72	£0.00	£0.18	£0.31	£0.00	£7.76
M&S Green Street East Street 16, Neath SA11 1DH	£0.16	£0.10	£0.00	£0.00	£0.17	£0.00	£0.22	£0.78	£0.00	£0.08	£0.48	£0.00	£1.99
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	£0.47	£0.00	£0.00	£0.18	£0.00	£0.65
Out of Centre													
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.45	£1.71	£0.28	£0.27	£0.84	£0.12	£0.14	£0.95	£0.00	£0.09	£0.38	£0.00	£5.23
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.24	£0.38	£0.00	£0.07	£0.00	£0.00	£0.23	£0.54	£0.00	£0.04	£0.28	£0.00	£1.79
Zone 3 (CF33 4, CF33 6 and SA13 2)													
Pyle District Centre													
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.28	£0.00	£7.67	£0.04	£0.00	£3.48	£0.05	£0.00	£2.62	£0.02	£0.00	£1.00	£15.16
Local shops, Pyle	£0.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.41	£0.00	£0.00	£0.18	£0.59
Kenfig Hill District Centre													
Local shops, Kenfig Hill	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.82	£0.00	£0.00	£0.36	£1.17
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	£0.53	£0.00	£0.00	£0.31	£0.84
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	£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	£0.20	£0.00	£0.00	£0.09	£0.29
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.39	£0.00	£0.00	£0.17	£0.59
Local shops, North Cornelly	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.63	£0.00	£0.00	£0.26	£0.92
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.33	£1.35
OUTSIDE STUDY AREA													
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.00	£0.62	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.62
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.24	£0.00	£0.24	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.65
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.71	£1.57	£0.00	£0.28	£0.43	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.00
Asda, Castle Street, Maesteg, CF34 3AG	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.08	£0.00	£0.00	£0.24
Asda, Coychurch Rd, Bridgend CF31 9UN	£0.00	£0.00	£0.55	£0.00	£0.00	£0.27	£0.00	£0.00	£0.04	£0.00	£0.00	£0.09	£0.96
B&M, John Street, Porthcawl, CF36 3BA	£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
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£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
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£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
Co-Op Food, New Road, Porthcawl, CF36 5BA	£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
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.00	£0.00	£0.44	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.63
Iceland, lynyfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.00	£0.56	£0.00	£0.00	£0.14	£0.00	£0.90
Iceland, St. Davids Square, Swansea, SA1 3LG	£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
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.79	£0.10	£0.00	£0.25	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£1.38
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.00	£0.00	£0.16	£0.00	£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29
Lidl, Traillwn Road, Llansamlet, Swansea, SA7 9WL	£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
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£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
Londis, Texaco Tondur Service Station, Maesteg Road, Tondur, Bridgend	£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
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£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
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£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
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.41	£0.00	£0.06	£0.10	£0.00	£0.72
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.06	£0.00	£0.00	£0.21
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.72	£0.00	£0.02	£0.19	£0.00	£1.11
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.76	£0.94	£0.56	£0.64	£0.28	£0.20	£0.00	£0.00	£0.00	£0.08	£0.03	£0.00	£4.49
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.00	£0.00	£0.08	£0.00	£0.04	£0.00	£0.14	£0.00	£0.17	£0.00	£0.00	£0.15	£0.59
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£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
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.64	£4.77	£0.00	£0.14	£1.79	£0.00	£0.29	£0.12	£0.00	£0.06	£0.05	£0.00	£7.87
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.00	£0.00	£1.32	£0.14	£0.00	£0.56	£0.00	£0.00	£0.13	£0.00	£0.00	£0.12	£2.26
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.00	£0.00	£0.31	£0.04	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.61
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£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
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.00	£0.89	£1.16	£0.13	£0.39	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.85
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.00	£0.00	£0.79	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£1.04
Local shops, Bridgend Town Centre	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.00	£0.00	£0.21
Local shops, Cymmer village 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	£0.00
Local shops, Maesteg Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.04	£0.08	£0.00	£0.02	£0.31
Local shops, Neath Abbey 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	£0.00
Local shops, Pontardawe local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.02	£0.00	£0.00	£0.07
Local shops, Skewen 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	£0.00
Local shops, Swansea City Centre	£0.08	£0.00	£0.00	£0.04	£0.00	£0.00	£0.19	£0.27	£0.00	£0.02	£0.09	£0.00	£0.69
Local shops, Tonna 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	£0.00
Aldi, Llandoello Rd, Cross Hands, Llanelli SA14 6RD	£0.00												

TABLE 4: CONVENIENCE GOODS TURNOVER, 2024 (£m) SUMMARY

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.65	£0.00	£0.13	£0.77
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£1.10	£0.30	£0.67	£2.07
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.49	£0.00	£0.09	£0.58
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£23.41	£0.96	£6.36	£30.73
Local shops, Port Talbot Town Centre	£2.27	£0.11	£0.21	£2.60
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£9.89	£0.56	£4.35	£14.81
Local shops, Talbach local centre	£0.00	£0.00	£0.00	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.23	£0.00	£0.75	£0.98
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.25	£0.00	£0.00	£0.25
Pentwyn Baglan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.89	£0.00	£0.00	£0.89
Cwmavon, Local Centre				
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£3.31	£0.00	£0.00	£3.31
Local shops, Cwmafan village centre	£0.25	£0.00	£0.00	£0.25
Out of Centre				
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.08	£0.00	£0.00	£0.08
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.00	£0.00	£0.00	£0.00
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£2.82	£0.27	£0.57	£3.65
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.67	£0.85	£1.54	£9.06
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£17.54	£1.97	£4.79	£24.31
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.00	£0.00	£0.00	£0.00
Premier, Forge Rd, Port Talbot SA13 1PG	£0.23	£0.00	£0.00	£0.23
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£1.13	£0.06	£0.00	£1.19
Spar, Talbot Rd, Neath SA13 1DT	£0.24	£0.00	£0.09	£0.33
Zone 2 (SA11 1 and SA11 2)				
Neath Town Centre				
Local shops, Neath Town Centre	£0.00	£0.59	£0.00	£0.59
Morrisons, Angel Street, Neath, SA11 1RS	£1.31	£6.44	£0.00	£7.75
M&S Green Street East Street 16, Neath SA11 1DH	£0.44	£1.53	£0.00	£1.97
Briton Ferry Town Centre/Neath Road District Centre				
Local shops, Briton Ferry Town Centre	£0.00	£0.65	£0.00	£0.65
Out of Centre				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.95	£3.88	£0.44	£5.27
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.58	£1.20	£0.00	£1.78
Zone 3 (CF33 4, CF33 6 and SA13 2)				
Pyle District Centre				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.39	£0.00	£14.94	£15.33
Local shops, Pyle	£0.00	£0.00	£0.45	£0.45
Kenfig Hill District Centre				
Local shops, Kenfig Hill	£0.00	£0.00	£0.88	£0.88
Margam Local Centre				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.00	£0.63	£0.63
Local shops, Margam local centre	£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	£0.21	£0.21
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.00	£0.46	£0.46
Local shops, North Cornelly	£0.00	£0.00	£0.70	£0.70
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£0.00	£1.11	£1.11
OUTSIDE STUDY AREA				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.00	£0.68	£0.68
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.31	£0.00	£0.38	£0.68
Aldi, Neath Abbey Rd, Neath SA10 7BR	£1.03	£2.00	£0.00	£3.03
Asda, Castle Street, Maesteg, CF34 9UN	£0.23	£0.00	£0.00	£0.23
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£0.00	£1.00	£1.00
B&M, John Street, Porthcawl, CF36 3BA	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.00	£0.00	£0.00	£0.00
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.00	£0.00	£0.00	£0.00
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	£0.00	£0.00	£0.69	£0.69
Iceland, lynyf Walk, Llynfi Road, Maesteg, CF34 9DS	£0.11	£0.00	£0.00	£0.11
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.90	£0.00	£0.90
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.00	£0.00	£0.00	£0.00
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£1.07	£0.34	£0.00	£1.41
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	£0.00	£0.00	£0.32	£0.32
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.00	£0.00	£0.00	£0.00
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.00	£0.00	£0.00	£0.00
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	£0.00	£0.00	£0.00	£0.00
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.00	£0.00	£0.00	£0.00
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.00	£0.00	£0.00	£0.00
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.19	£0.51	£0.00	£0.70
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.19	£0.00	£0.00	£0.19
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.18	£0.91	£0.00	£1.09
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.55	£1.24	£0.84	£4.63
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.13	£0.04	£0.33	£0.50
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£1.14	£6.74	£0.00	£7.87
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.14	£0.00	£2.24	£2.38
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.00	£0.63	£0.67
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.00	£0.00	£0.00	£0.00
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.13	£1.28	£1.58	£2.99
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.00	£0.00	£1.11	£1.11
Local shops, Bridgend Town Centre	£0.00	£0.00	£0.19	£0.19
Local shops, Cymmer village centre	£0.00	£0.00	£0.00	£0.00
Local shops, Maesteg Town Centre	£0.23	£0.00	£0.05	£0.27
Local shops, Neath Abbey local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Pontardawe local centre	£0.06	£0.00	£0.00	£0.06
Local shops, Skewen local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Swansea City Centre	£0.32	£0.36	£0.00	£0.68
Local shops, Tonna local centre	£0.00	£0.00	£0.00	£0.00
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.00	£0.03	£0.00	£0.03
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.40	£0.00	£0.57	£0.97
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.69	£0.42	£0.00	£1.12
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.08	£0.00	£1.08
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.06	£0.00	£0.06
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.00	£0.13	£0.13
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.00	£0.48	£0.48
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.04	£0.00	£0.04
Local shops, Porthcawl	£0.00	£0.00	£0.91	£0.91
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.36	£0.00	£0.00	£0.36
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.54	£0.00	£0.00	£0.54
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.69	£1.19	£0.38	£3.25
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.00	£0.00	£0.04	£0.04
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.44	£0.04	£0.00	£0.48
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.00	£0.04	£0.00	£0.04
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.23	£0.00	£0.44	£0.67
Notes:				
Data derived from Table 2.				

TABLE 5: CONVENIENCE GOODS MARKET SHARE (%) SUMMARY

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.7%	0.0%	0.2%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	1.3%	0.8%	1.3%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.6%	0.0%	0.2%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	26.7%	2.6%	12.1%
Local shops, Port Talbot Town Centre	2.6%	0.3%	0.4%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	11.3%	1.5%	8.3%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.3%	0.0%	1.4%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.3%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	1.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	3.8%	0.0%	0.0%
Local shops, Cwmafan village centre	0.3%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.1%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	3.2%	0.7%	1.1%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	7.6%	2.3%	2.9%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	20.0%	5.4%	9.2%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.3%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	1.3%	0.2%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.3%	0.0%	0.2%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	1.6%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	1.5%	17.6%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.5%	4.2%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	1.8%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	1.1%	10.6%	0.8%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.7%	3.3%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.5%	0.0%	28.5%
Local shops, Pyle	0.0%	0.0%	0.9%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	1.7%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	1.2%
Local shops, Margam local centre	0.0%	0.0%	0.0%
North Cornelly Local Service Centre			
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.0%	0.0%	0.4%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.9%
Local shops, North Cornelly	0.0%	0.0%	1.3%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	2.1%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	1.3%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.4%	0.0%	0.7%
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.2%	5.5%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.3%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	1.9%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	1.3%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.1%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	2.5%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.2%	0.9%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.6%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.2%	1.4%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.2%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.2%	2.5%	0.0%
Tesco Extra, Nantylffin North, Swansea Enterprise Park, Swansea, SA7 9RF	2.9%	3.4%	1.6%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.2%	0.1%	0.6%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.3%	18.4%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.2%	0.0%	4.3%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	1.2%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.1%	3.5%	3.0%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	2.1%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.4%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.3%	0.0%	0.1%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.1%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.4%	1.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.1%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.5%	0.0%	1.1%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.8%	1.2%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	2.9%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.2%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.2%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.9%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.1%	0.0%
Local shops, Porthcawl	0.0%	0.0%	1.7%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.4%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.6%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	1.9%	3.2%	0.7%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.1%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.5%	0.1%	0.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.1%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.3%	0.0%	0.8%
	0.0%	0.0%	0.0%
Note			
Market shares calculated by applying turnover by zone (Table 3) to available expenditure (by zone).			

TABLE 6: TRADE RE-DISTRIBUTION FOLLOWING CLOSURE OF ICELAND (%)

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.0%	0.0%	0.0%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.0%	0.0%	0.0%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.0%	0.0%	0.0%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	37.2%	19.8%	43.7%
Local shops, Port Talbot Town Centre	0.0%	0.0%	0.0%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	0.0%	0.0%	0.1%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.0%	0.0%	0.0%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.0%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	0.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	0.0%	0.0%	0.0%
Local shops, Cwmafan village centre	0.0%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.0%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	56.0%	69.9%	48.6%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	1.9%	3.1%	1.9%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	4.9%	7.1%	5.8%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.0%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	0.0%	0.0%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.0%	0.0%	0.0%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	0.0%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	0.0%	0.0%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.0%	0.0%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	0.0%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.0%	0.0%	0.0%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.0%	0.0%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.0%	0.0%	0.0%
Local shops, Pyle	0.0%	0.0%	0.0%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	0.0%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	0.0%
Local shops, Margam local centre	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%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.0%
Local shops, North Cornelly	0.0%	0.0%	0.0%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	0.0%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	0.0%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.0%
Aldi, Neath Abbey Rd, Neath SA10 7BR	0.0%	0.0%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.0%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	0.0%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	0.0%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	0.0%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	0.0%	0.0%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.0%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.0%	0.0%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.0%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.0%	0.0%	0.0%
Tesco Extra, Nantylffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.0%	0.0%	0.0%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	0.0%	0.0%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.0%	0.0%	0.0%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	0.0%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.0%	0.0%	0.0%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	0.0%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.0%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.0%	0.0%	0.0%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.0%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.0%	0.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.0%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.0%	0.0%	0.0%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.0%	0.0%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	0.0%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.0%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.0%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.0%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.0%	0.0%
Local shops, Porthcawl	0.0%	0.0%	0.0%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.0%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.0%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.0%	0.0%	0.0%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.0%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.0%	0.0%	4.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.0%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.0%	0.0%	0.0%
	0.0%	0.0%	0.0%
Notes:			
Re-distribution of trade from town centre Iceland store based upon presence of new Iceland store and retail offer of other stores in the catchment area.			

TABLE 7: TRADE RE-DISTRIBUTION FOLLOWING CLOSURE OF ICELAND (£m)

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.0	£0.0	£0.0	£0.0
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£0.4	£0.1	£0.3	£0.8
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£0.0	£0.0	£0.0	£0.0
Local shops, Talbach local centre	£0.0	£0.0	£0.0	£0.0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.0	£0.0
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0
Pentwyn Baglan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0
Cwmavon, Local Centre				
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£0.0	£0.0	£0.0	£0.0
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0
Out of Centre				
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.0	£0.0	£0.0	£0.0
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£0.6	£0.2	£0.3	£1.2
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£0.1	£0.0	£0.0	£0.1
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.0	£0.0	£0.0	£0.0
Premier, Forge Rd, Port Talbot SA13 1PG	£0.0	£0.0	£0.0	£0.0
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£0.0	£0.0	£0.0	£0.0
Spar, Talbot Rd, Neath SA13 1DT	£0.0	£0.0	£0.0	£0.0
Zone 2 (SA11 1 and SA11 2)				
Neath Town Centre				
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0
Morrisons, Angel Street, Neath, SA11 1RS	£0.0	£0.0	£0.0	£0.0
M&S Green Street East Street 16, Neath SA11 1DH	£0.0	£0.0	£0.0	£0.0
Briton Ferry Town Centre/Neath Road District Centre				
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0
Out of Centre				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.0	£0.0	£0.0	£0.0
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.0	£0.0	£0.0	£0.0
Zone 3 (CF33 4, CF33 6 and SA13 2)				
Pyle District Centre				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.0	£0.0	£0.0	£0.0
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0
Kenfig Hill District Centre				
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0
Margam Local Centre				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0
Local shops, Margam local centre	£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
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.0	£0.0
OUTSIDE STUDY AREA				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.0	£0.0
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.0	£0.0	£0.0	£0.0
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.0	£0.0	£0.0	£0.0
Asda, Castle Street, Maesteg, CF34 9UN	£0.0	£0.0	£0.0	£0.0
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.0	£0.0
B&M, John Street, Porthcawl, CF36 3BA	£0.0	£0.0	£0.0	£0.0
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.0	£0.0	£0.0	£0.0
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.0	£0.0	£0.0	£0.0
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.0	£0.0	£0.0	£0.0
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.0	£0.0	£0.0	£0.0
Iceland, lynyf Walk, Llynfi Road, Maesteg, CF34 9DS	£0.0	£0.0	£0.0	£0.0
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.0	£0.0	£0.0	£0.0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.0	£0.0	£0.0	£0.0
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.0	£0.0	£0.0	£0.0
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.0	£0.0	£0.0	£0.0
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.0	£0.0	£0.0	£0.0
Londis, Texaco Tondur Service Station, Maesteg Road, Tondur, Bridgend	£0.0	£0.0	£0.0	£0.0
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.0	£0.0	£0.0	£0.0
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.0	£0.0	£0.0	£0.0
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Nantylfin North, Swansea Enterprise Park, Swansea, SA7 9RF	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.0	£0.0
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£0.0	£0.0	£0.0
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	£0.0	£0.0	£0.0	£0.0
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Cymmer village centre	£0.0	£0.0	£0.0	£0.0
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Neath Abbey local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Pontardawe local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Skewen local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Swansea City Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Tonna local centre	£0.0	£0.0	£0.0	£0.0
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.0	£0.0	£0.0	£0.0
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.0	£0.0	£0.0	£0.0
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.0	£0.0	£0.0	£0.0
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.0	£0.0	£0.0	£0.0
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.0	£0.0	£0.0	£0.0
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.0	£0.0
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.0	£0.0
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.0	£0.0	£0.0	£0.0
Local shops, Porthcawl	£0.0	£0.0	£0.0	£0.0
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.0	£0.0	£0.0	£0.0
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.0	£0.0	£0.0	£0.0
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.0	£0.0	£0.0	£0.0
Notes:				
£m re-distribution calculated by applying % re-distribution (Table 6) to turnover of former Iceland (by zone).				

TABLE 8: CONVENIENCE GOODS TURNOVER, 2024, POST-ICELAND CLOSURE (£m)

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.65	£0.00	£0.13	£0.77
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.00	£0.00	£0.00	£0.00
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.49	£0.00	£0.09	£0.58
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£23.82	£1.02	£6.65	£31.49
Local shops, Port Talbot Town Centre	£2.27	£0.11	£0.21	£2.60
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£9.89	£0.56	£4.35	£14.81
Local shops, Talbach local centre	£0.00	£0.00	£0.00	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.23	£0.00	£0.75	£0.98
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.25	£0.00	£0.00	£0.25
Pentwyn Baglan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.89	£0.00	£0.00	£0.89
Cwmavon, Local Centre				
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£3.31	£0.00	£0.00	£3.31
Local shops, Cwmafan village centre	£0.25	£0.00	£0.00	£0.25
Out of Centre				
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.08	£0.00	£0.00	£0.08
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.00	£0.00	£0.00	£0.00
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£3.43	£0.48	£0.89	£4.80
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.69	£0.86	£1.55	£9.10
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£17.60	£1.99	£4.83	£24.42
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.00	£0.00	£0.00	£0.00
Premier, Forge Rd, Port Talbot SA13 1PG	£0.23	£0.00	£0.00	£0.23
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£1.13	£0.06	£0.00	£1.19
Spar, Talbot Rd, Neath SA13 1DT	£0.24	£0.00	£0.09	£0.33
Zone 2 (SA11 1 and SA11 2)				
Neath Town Centre				
Local shops, Neath Town Centre	£0.00	£0.59	£0.00	£0.59
Morrisons, Angel Street, Neath, SA11 1RS	£1.31	£6.44	£0.00	£7.75
M&S Green Street East Street 16, Neath SA11 1DH	£0.44	£1.53	£0.00	£1.97
Briton Ferry Town Centre/Neath Road District Centre				
Local shops, Briton Ferry Town Centre	£0.00	£0.65	£0.00	£0.65
Out of Centre				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.95	£3.88	£0.44	£5.27
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.58	£1.20	£0.00	£1.78
Zone 3 (CF33 4, CF33 6 and SA13 2)				
Pyle District Centre				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.39	£0.00	£14.94	£15.33
Local shops, Pyle	£0.00	£0.00	£0.45	£0.45
Kenfig Hill District Centre				
Local shops, Kenfig Hill	£0.00	£0.00	£0.88	£0.88
Margam Local Centre				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.00	£0.63	£0.63
Local shops, Margam local centre	£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	£0.21	£0.21
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.00	£0.46	£0.46
Local shops, North Cornelly	£0.00	£0.00	£0.70	£0.70
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£0.00	£1.11	£1.11
OUTSIDE STUDY AREA				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.00	£0.68	£0.68
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.31	£0.00	£0.38	£0.68
Aldi, Neath Abbey Rd, Neath SA10 7BR	£1.03	£2.00	£0.00	£3.03
Asda, Castle Street, Maesteg, CF34 9UN	£0.23	£0.00	£0.00	£0.23
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£0.00	£1.00	£1.00
B&M, John Street, Porthcawl, CF36 3BA	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.00	£0.00	£0.00	£0.00
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.00	£0.00	£0.00	£0.00
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	£0.00	£0.00	£0.69	£0.69
Iceland, lynyf Walk, Llynfi Road, Maesteg, CF34 9DS	£0.11	£0.00	£0.00	£0.11
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.90	£0.00	£0.90
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.00	£0.00	£0.00	£0.00
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£1.07	£0.34	£0.00	£1.41
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	£0.00	£0.00	£0.32	£0.32
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.00	£0.00	£0.00	£0.00
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.00	£0.00	£0.00	£0.00
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	£0.00	£0.00	£0.00	£0.00
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.00	£0.00	£0.00	£0.00
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.00	£0.00	£0.00	£0.00
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.19	£0.51	£0.00	£0.70
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.19	£0.00	£0.00	£0.19
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.18	£0.91	£0.00	£1.09
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.55	£1.24	£0.84	£4.63
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.13	£0.04	£0.33	£0.50
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£1.14	£6.74	£0.00	£7.87
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.14	£0.00	£2.24	£2.38
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.00	£0.63	£0.67
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.00	£0.00	£0.00	£0.00
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.13	£1.28	£1.58	£2.99
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.00	£0.00	£1.11	£1.11
Local shops, Bridgend Town Centre	£0.00	£0.00	£0.19	£0.19
Local shops, Cymmer village centre	£0.00	£0.00	£0.00	£0.00
Local shops, Maesteg Town Centre	£0.23	£0.00	£0.05	£0.27
Local shops, Neath Abbey local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Pontardawe local centre	£0.06	£0.00	£0.00	£0.06
Local shops, Skewen local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Swansea City Centre	£0.32	£0.36	£0.00	£0.68
Local shops, Tonna local centre	£0.00	£0.00	£0.00	£0.00
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.00	£0.03	£0.00	£0.03
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.40	£0.00	£0.57	£0.97
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.69	£0.42	£0.00	£1.12
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.08	£0.00	£1.08
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.06	£0.00	£0.06
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.00	£0.13	£0.13
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.00	£0.48	£0.48
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.04	£0.00	£0.04
Local shops, Porthcawl	£0.00	£0.00	£0.91	£0.91
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.36	£0.00	£0.00	£0.36
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.54	£0.00	£0.00	£0.54
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.69	£1.19	£0.38	£3.25
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.00	£0.00	£0.04	£0.04
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.44	£0.04	£0.00	£0.48
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.00	£0.04	£0.00	£0.04
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.23	£0.00	£0.44	£0.67

TABLE 9: CONVENIENCE GOODS MARKET SHARE POST-ICELAND CLOSURE (%)

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.7%	0.0%	0.2%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.0%	0.0%	0.0%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.6%	0.0%	0.2%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	27.2%	2.8%	12.7%
Local shops, Port Talbot Town Centre	2.6%	0.3%	0.4%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	11.3%	1.5%	8.3%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.3%	0.0%	1.4%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.3%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	1.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	3.8%	0.0%	0.0%
Local shops, Cwmafan village centre	0.3%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.1%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	3.9%	1.3%	1.7%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	7.6%	2.3%	3.0%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	20.1%	5.4%	9.2%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.3%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	1.3%	0.2%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.3%	0.0%	0.2%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	1.6%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	1.5%	17.6%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.5%	4.2%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	1.8%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	1.1%	10.6%	0.8%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.7%	3.3%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.5%	0.0%	28.5%
Local shops, Pyle	0.0%	0.0%	0.9%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	1.7%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	1.2%
Local shops, Margam local centre	0.0%	0.0%	0.0%
North Cornelly Local Service Centre			
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.0%	0.0%	0.4%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.9%
Local shops, North Cornelly	0.0%	0.0%	1.3%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	2.1%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	1.3%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.4%	0.0%	0.7%
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.2%	5.5%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.3%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	1.9%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	1.3%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.1%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	2.5%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.2%	0.9%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.6%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.2%	1.4%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.2%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.2%	2.5%	0.0%
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	2.9%	3.4%	1.6%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.2%	0.1%	0.6%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.3%	18.4%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.2%	0.0%	4.3%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	1.2%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.1%	3.5%	3.0%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	2.1%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.4%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.3%	0.0%	0.1%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.1%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.4%	1.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.1%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.5%	0.0%	1.1%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.8%	1.2%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	2.9%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.2%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.2%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.9%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.1%	0.0%
Local shops, Porthcawl	0.0%	0.0%	1.7%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.4%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.6%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	1.9%	3.2%	0.7%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.1%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.5%	0.1%	0.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.1%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.3%	0.0%	0.8%
	0.0%	0.0%	0.0%

TABLE 10: TRADE RE-DISTRIBUTION FOLLOWING CLOSURE OF M&S NEATH (%)

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.0%	0.0%	0.0%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.0%	0.0%	0.0%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.0%	0.0%	0.0%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	0.0%	0.0%	0.0%
Local shops, Port Talbot Town Centre	0.0%	0.0%	0.0%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	0.0%	0.0%	0.0%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.0%	0.0%	0.0%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.0%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	0.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	0.0%	0.0%	0.0%
Local shops, Cwmafan village centre	0.0%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.0%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	0.0%	0.0%	0.0%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.0%	0.0%	0.0%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.0%	0.0%	0.0%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.0%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	0.0%	0.0%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.0%	0.0%	0.0%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	0.0%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	33.9%	45.6%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.0%	0.0%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	0.0%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.0%	0.0%	0.0%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.0%	0.0%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.0%	0.0%	0.0%
Local shops, Pyle	0.0%	0.0%	0.0%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	0.0%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	0.0%
Local shops, Margam local centre	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%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.0%
Local shops, North Cornelly	0.0%	0.0%	0.0%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	0.0%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	0.0%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.0%
Aldi, Neath Abbey Rd, Neath SA10 7BR	10.6%	5.7%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.0%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	0.0%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	0.0%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	0.0%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	11.1%	1.0%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.0%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.0%	0.0%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.0%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.0%	0.0%	0.0%
Tesco Extra, Nantylffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.0%	0.0%	0.0%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	29.4%	47.7%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.0%	0.0%	0.0%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	0.0%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.0%	0.0%	0.0%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	0.0%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.0%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.0%	0.0%	0.0%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.0%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.0%	0.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.0%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.0%	0.0%	0.0%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.0%	0.0%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	0.0%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.0%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.0%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.0%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.0%	0.0%
Local shops, Porthcawl	0.0%	0.0%	0.0%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	9.3%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	5.6%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.0%	0.0%	0.0%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.0%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.0%	0.0%	0.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.0%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.0%	0.0%	0.0%
Notes:			
Re-distribution of trade from town centre M&S store based upon retail offer of other stores in the catchment area.			

TABLE 11: TRADE RE-DISTRIBUTION FOLLOWING CLOSURE OF M&S NEATH (£m)

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.0	£0.0	£0.0	£0.0
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£0.0	£0.0	£0.0	£0.0
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£0.0	£0.0	£0.0	£0.0
Local shops, Talbach local centre	£0.0	£0.0	£0.0	£0.0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.0	£0.0
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0
Pentwyn Baglan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0
Cwmavon, Local Centre				
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£0.0	£0.0	£0.0	£0.0
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0
Out of Centre				
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.0	£0.0	£0.0	£0.0
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£0.0	£0.0	£0.0	£0.0
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.0	£0.0	£0.0	£0.0
Premier, Forge Rd, Port Talbot SA13 1PG	£0.0	£0.0	£0.0	£0.0
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£0.0	£0.0	£0.0	£0.0
Spar, Talbot Rd, Neath SA13 1DT	£0.0	£0.0	£0.0	£0.0
Zone 2 (SA11 1 and SA11 2)				
Neath Town Centre				
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0
Morrisons, Angel Street, Neath, SA11 1RS	£0.1	£0.7	£0.0	£0.8
M&S Green Street East Street 16, Neath SA11 1DH	£0.0	£0.0	£0.0	£0.0
Briton Ferry Town Centre/Neath Road District Centre				
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0
Out of Centre				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.0	£0.0	£0.0	£0.0
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.0	£0.0	£0.0	£0.0
Zone 3 (CF33 4, CF33 6 and SA13 2)				
Pyle District Centre				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.0	£0.0	£0.0	£0.0
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0
Kenfig Hill District Centre				
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0
Margam Local Centre				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0
Local shops, Margam local centre	£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
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.0	£0.0
OUTSIDE STUDY AREA				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.0	£0.0
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.0	£0.0	£0.0	£0.0
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.0	£0.1	£0.0	£0.1
Asda, Castle Street, Maesteg, CF34 9UN	£0.0	£0.0	£0.0	£0.0
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.0	£0.0
B&M, John Street, Porthcawl, CF36 3BA	£0.0	£0.0	£0.0	£0.0
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.0	£0.0	£0.0	£0.0
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.0	£0.0	£0.0	£0.0
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.0	£0.0	£0.0	£0.0
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	£0.0	£0.0	£0.0	£0.0
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.0	£0.0	£0.0	£0.0
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.0	£0.0	£0.0	£0.0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.0	£0.0	£0.0	£0.1
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	£0.0	£0.0	£0.0	£0.0
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.0	£0.0	£0.0	£0.0
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.0	£0.0	£0.0	£0.0
Londis, Texaco Tondu Service Station, Maesteg Road, Tondu, Bridgend	£0.0	£0.0	£0.0	£0.0
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.0	£0.0	£0.0	£0.0
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.0	£0.0	£0.0	£0.0
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Nantylffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.1	£0.7	£0.0	£0.9
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.0	£0.0
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£0.0	£0.0	£0.0
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.0	£0.0	£0.0	£0.0
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Cymmer village centre	£0.0	£0.0	£0.0	£0.0
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Neath Abbey local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Pontardawe local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Skewen local centre	£0.0	£0.0	£0.0	£0.0
Local shops, Swansea City Centre	£0.0	£0.0	£0.0	£0.0
Local shops, Tonna local centre	£0.0	£0.0	£0.0	£0.0
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.0	£0.0	£0.0	£0.0
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.0	£0.0	£0.0	£0.0
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.0	£0.0	£0.0	£0.0
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.0	£0.0	£0.0	£0.0
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.0	£0.0	£0.0	£0.0
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.0	£0.0
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.0	£0.0
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.0	£0.0	£0.0	£0.0
Local shops, Porthcawl	£0.0	£0.0	£0.0	£0.0
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.0	£0.0	£0.0	£0.0
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.0	£0.0	£0.0	£0.0
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.0	£0.0	£0.0	£0.0
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.0	£0.0	£0.0	£0.0
Note				
£m re-distribution calculated by applying % re-distribution (Table 10) to turnover of former M&S (by zone).				

TABLE 12: CONVENIENCE GOODS TURNOVER, 2024, POST-M&S NEATH CLOSURE (£m)

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.65	£0.00	£0.13	£0.77
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.00	£0.00	£0.00	£0.00
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.49	£0.00	£0.09	£0.58
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£23.82	£1.02	£6.65	£31.49
Local shops, Port Talbot Town Centre	£2.27	£0.11	£0.21	£2.60
	£0.00	£0.00	£0.00	
Commercial Road District Centre	£0.00	£0.00	£0.00	
Aldi, Commercial Road, Port Talbot, SA13 1LG	£9.89	£0.56	£4.35	£14.81
Local shops, Talbach local centre	£0.00	£0.00	£0.00	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.23	£0.00	£0.75	£0.98
	£0.00	£0.00	£0.00	
Fairway Sandfields, Local Centre	£0.00	£0.00	£0.00	
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.25	£0.00	£0.00	£0.25
	£0.00	£0.00	£0.00	
Pentwyn Baglan Road, Baglan, Local Centre	£0.00	£0.00	£0.00	
Local shops, Baglan village centre	£0.89	£0.00	£0.00	£0.89
	£0.00	£0.00	£0.00	
Cwmavon, Local Centre	£0.00	£0.00	£0.00	
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£3.31	£0.00	£0.00	£3.31
Local shops, Cwmafan village centre	£0.25	£0.00	£0.00	£0.25
	£0.00	£0.00	£0.00	
Out of Centre	£0.00	£0.00	£0.00	
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.08	£0.00	£0.00	£0.08
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.00	£0.00	£0.00	£0.00
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£3.43	£0.48	£0.89	£4.80
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.69	£0.86	£1.55	£9.10
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£17.60	£1.99	£4.83	£24.42
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.00	£0.00	£0.00	£0.00
Premier, Forge Rd, Port Talbot SA13 1PG	£0.23	£0.00	£0.00	£0.23
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£1.13	£0.06	£0.00	£1.19
Spar, Talbot Rd, Neath SA13 1DT	£0.24	£0.00	£0.09	£0.33
	£0.00	£0.00	£0.00	
Zone 2 (SA11 1 and SA11 2)	£0.00	£0.00	£0.00	
	£0.00	£0.00	£0.00	
Neath Town Centre	£0.00	£0.00	£0.00	
Local shops, Neath Town Centre	£0.00	£0.59	£0.00	£0.59
Morrisons, Angel Street, Neath, SA11 1RS	£1.46	£7.14	£0.00	£8.60
M&S Green Street East Street 16, Neath SA11 1DH	£0.00	£0.00	£0.00	£0.00
	£0.00	£0.00	£0.00	
Briton Ferry Town Centre/Neath Road District Centre	£0.00	£0.00	£0.00	
Local shops, Briton Ferry Town Centre	£0.00	£0.65	£0.00	£0.65
	£0.00	£0.00	£0.00	
Out of Centre	£0.00	£0.00	£0.00	
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.95	£3.88	£0.44	£5.27
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.58	£1.20	£0.00	£1.78
	£0.00	£0.00	£0.00	
Zone 3 (CF33 4, CF33 6 and SA13 2)	£0.00	£0.00	£0.00	
	£0.00	£0.00	£0.00	
Pyle District Centre	£0.00	£0.00	£0.00	
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.39	£0.00	£14.94	£15.33
Local shops, Pyle	£0.00	£0.00	£0.45	£0.45
	£0.00	£0.00	£0.00	
Kenfig Hill District Centre	£0.00	£0.00	£0.00	
Local shops, Kenfig Hill	£0.00	£0.00	£0.88	£0.88
	£0.00	£0.00	£0.00	
Margam Local Centre	£0.00	£0.00	£0.00	
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.00	£0.63	£0.63
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00
	£0.00	£0.00	£0.00	
North Cornelly Local Service Centre	£0.00	£0.00	£0.00	
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.00	£0.21	£0.21
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.00	£0.46	£0.46
Local shops, North Cornelly	£0.00	£0.00	£0.70	£0.70
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£0.00	£1.11	£1.11
	£0.00	£0.00	£0.00	
OUTSIDE STUDY AREA	£0.00	£0.00	£0.00	
	£0.00	£0.00	£0.00	
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.00	£0.68	£0.68
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.31	£0.00	£0.38	£0.68
Aldi, Neath Abbey Rd, Neath SA10 7BR	£1.07	£2.09	£0.00	£3.16
Asda, Castle Street, Maesteg, CF34 9UN	£0.23	£0.00	£0.00	£0.23
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£0.00	£1.00	£1.00
B&M, John Street, Porthcawl, CF36 3BA	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.00	£0.00	£0.00	£0.00
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.00	£0.00	£0.00	£0.00
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	£0.00	£0.00	£0.69	£0.69
Iceland, lynyf Walk, Llynfi Road, Maesteg, CF34 9DS	£0.11	£0.00	£0.00	£0.11
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.90	£0.00	£0.90
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.00	£0.00	£0.00	£0.00
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£1.12	£0.35	£0.00	£1.47
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	£0.00	£0.00	£0.32	£0.32
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.00	£0.00	£0.00	£0.00
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.00	£0.00	£0.00	£0.00
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	£0.00	£0.00	£0.00	£0.00
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.00	£0.00	£0.00	£0.00
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.00	£0.00	£0.00	£0.00
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.19	£0.51	£0.00	£0.70
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.19	£0.00	£0.00	£0.19
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.18	£0.91	£0.00	£1.09
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.55	£1.24	£0.84	£4.63
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.13	£0.04	£0.33	£0.50
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£1.27	£7.46	£0.00	£8.73
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.14	£0.00	£2.24	£2.38
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.00	£0.63	£0.67
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.00	£0.00	£0.00	£0.00
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.13	£1.28	£1.58	£2.99
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.00	£0.00	£1.11	£1.11
Local shops, Bridgend Town Centre	£0.00	£0.00	£0.19	£0.19
Local shops, Cymmer village centre	£0.00	£0.00	£0.00	£0.00
Local shops, Maesteg Town Centre	£0.23	£0.00	£0.05	£0.27
Local shops, Neath Abbey local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Pontardawe local centre	£0.06	£0.00	£0.00	£0.06
Local shops, Skewen local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Swansea City Centre	£0.32	£0.36	£0.00	£0.68
Local shops, Tonna local centre	£0.00	£0.00	£0.00	£0.00
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.00	£0.03	£0.00	£0.03
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.40	£0.00	£0.57	£0.97
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.69	£0.42	£0.00	£1.12
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.08	£0.00	£1.08
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.06	£0.00	£0.06
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.00	£0.13	£0.13
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.00	£0.48	£0.48
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.04	£0.00	£0.04
Local shops, Porthcawl	£0.00	£0.00	£0.91	£0.91
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.40	£0.00	£0.00	£0.40
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.57	£0.00	£0.00	£0.57
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.69	£1.19	£0.38	£3.25
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.00	£0.00	£0.04	£0.04
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.44	£0.04	£0.00	£0.48
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.00	£0.04	£0.00	£0.04
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.23	£0.00	£0.44	£0.67

TABLE 13: CONVENIENCE GOODS MARKET SHARE POST-M&S NEATH CLOSURE (%)

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.7%	0.0%	0.2%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.0%	0.0%	0.0%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.6%	0.0%	0.2%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	27.2%	2.8%	12.7%
Local shops, Port Talbot Town Centre	2.6%	0.3%	0.4%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	11.3%	1.5%	8.3%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.3%	0.0%	1.4%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.3%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	1.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	3.8%	0.0%	0.0%
Local shops, Cwmafan village centre	0.3%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.1%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	3.9%	1.3%	1.7%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	7.6%	2.3%	3.0%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	20.1%	5.4%	9.2%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.3%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	1.3%	0.2%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.3%	0.0%	0.2%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	1.6%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	1.7%	19.5%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.0%	0.0%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	1.8%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	1.1%	10.6%	0.8%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.7%	3.3%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.5%	0.0%	28.5%
Local shops, Pyle	0.0%	0.0%	0.9%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	1.7%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	1.2%
Local shops, Margam local centre	0.0%	0.0%	0.0%
North Cornelly Local Service Centre			
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.0%	0.0%	0.4%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.9%
Local shops, North Cornelly	0.0%	0.0%	1.3%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	2.1%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	1.3%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.4%	0.0%	0.7%
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.2%	5.7%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.3%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	1.9%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	1.3%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.1%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	2.5%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.3%	1.0%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.6%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.2%	1.4%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.2%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.2%	2.5%	0.0%
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	2.9%	3.4%	1.6%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.2%	0.1%	0.6%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.4%	20.4%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.2%	0.0%	4.3%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	1.2%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.1%	3.5%	3.0%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	2.1%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.4%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.3%	0.0%	0.1%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.1%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.4%	1.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.1%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.5%	0.0%	1.1%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.8%	1.2%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	2.9%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.2%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.2%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.9%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.1%	0.0%
Local shops, Porthcawl	0.0%	0.0%	1.7%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.5%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.6%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	1.9%	3.2%	0.7%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.1%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.5%	0.1%	0.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.1%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.3%	0.0%	0.8%
	0.0%	0.0%	0.0%

TABLE 14: TRADE DIVERSION TO PROPOSED ALDI STORE (%)

STORE/ CENTRE	1	2	3
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)			
Port Talbot Town Centre			
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.1%	0.0%	0.1%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.0%	0.0%	0.0%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.1%	0.0%	0.0%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	24.5%	10.2%	17.6%
Local shops, Port Talbot Town Centre	0.4%	0.2%	0.1%
Commercial Road District Centre			
Aldi, Commercial Road, Port Talbot, SA13 1LG	50.9%	28.4%	57.6%
Local shops, Talbach local centre	0.0%	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.0%	0.0%	0.3%
Fairway Sandfields, Local Centre			
Costcutter, Fairway, Port Talbot, SA12 7HR	0.0%	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre			
Local shops, Baglan village centre	0.0%	0.0%	0.0%
Cwmavon, Local Centre			
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	0.0%	0.0%	0.0%
Local shops, Cwmafan village centre	0.0%	0.0%	0.0%
Out of Centre			
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.0%	0.0%	0.0%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	0.0%	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	3.5%	4.8%	2.4%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	10.3%	12.9%	6.2%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	9.1%	10.0%	6.4%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	0.0%	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	0.0%	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	0.0%	0.0%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	0.0%	0.0%	0.0%
Zone 2 (SA11 1 and SA11 2)			
Neath Town Centre			
Local shops, Neath Town Centre	0.0%	0.0%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	0.2%	10.8%	0.0%
M&S Green Street East Street 16, Neath SA11 1DH	0.0%	0.0%	0.0%
Briton Ferry Town Centre/Neath Road District Centre			
Local shops, Briton Ferry Town Centre	0.0%	0.0%	0.0%
Out of Centre			
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.1%	5.8%	0.2%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.0%	0.0%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)			
Pyle District Centre			
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.1%	0.0%	5.9%
Local shops, Pyle	0.0%	0.0%	0.0%
Kenfig Hill District Centre			
Local shops, Kenfig Hill	0.0%	0.0%	0.0%
Margam Local Centre			
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.0%	0.0%	0.0%
Local shops, Margam local centre	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%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.0%	0.0%	0.0%
Local shops, North Cornelly	0.0%	0.0%	0.0%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.0%	0.0%	0.0%
OUTSIDE STUDY AREA			
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.0%	0.0%	0.3%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.1%
Aldi, Neath Abbey Rd, Neath SA10 7BR	0.2%	3.1%	0.0%
Asda, Castle Street, Maesteg, CF34 9UN	0.0%	0.0%	0.0%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.0%	0.0%	0.4%
B&M, John Street, Porthcawl, CF36 3BA	0.0%	0.0%	0.0%
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	0.0%	0.0%	0.0%
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	0.0%	0.0%	0.0%
Co-Op Food, New Road, Porthcawl, CF36 5BA	0.0%	0.0%	0.0%
Farmfoods, Pentre Felin Retail Park, Tondy, Bridgend, CF32 9GP	0.0%	0.0%	0.0%
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.0%	0.0%	0.0%
Iceland, Old Market Street, Neath, SA11 3NA	0.0%	0.0%	0.0%
Iceland, St. Davids Square, Swansea, SA1 3LG	0.0%	0.0%	0.0%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	0.2%	0.5%	0.0%
Lidl, Maesteg Rd, Tondy, Off CF32 9DF	0.0%	0.0%	0.1%
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	0.0%	0.0%	0.0%
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	0.0%	0.0%	0.0%
Londis, Texaco Tondy Service Station, Maesteg Road, Tondy, Bridgend	0.0%	0.0%	0.0%
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	0.0%	0.0%	0.0%
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	0.0%	0.0%	0.0%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.0%	0.0%	0.0%
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.0%	0.0%	0.0%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.0%	0.0%	0.0%
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.0%	0.0%	0.0%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.0%	0.1%	0.1%
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	0.0%	0.0%	0.0%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	0.2%	11.2%	0.0%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.0%	0.0%	0.9%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.0%	0.0%	0.3%
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	0.0%	0.0%	0.0%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.0%	1.9%	0.6%
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	0.0%	0.0%	0.4%
Local shops, Bridgend Town Centre	0.0%	0.0%	0.0%
Local shops, Cymmer village centre	0.0%	0.0%	0.0%
Local shops, Maesteg Town Centre	0.0%	0.0%	0.0%
Local shops, Neath Abbey local centre	0.0%	0.0%	0.0%
Local shops, Pontardawe local centre	0.0%	0.0%	0.0%
Local shops, Skewen local centre	0.0%	0.0%	0.0%
Local shops, Swansea City Centre	0.0%	0.0%	0.0%
Local shops, Tonna local centre	0.0%	0.0%	0.0%
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	0.0%	0.0%	0.0%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.0%	0.0%	0.0%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.0%	0.0%	0.0%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.0%	0.0%	0.0%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.0%	0.0%	0.0%
Home Bargains, Market St, Bridgend CF31 1LL	0.0%	0.0%	0.0%
Iceland, Brackla St, Bridgend CF31 1DD	0.0%	0.0%	0.0%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.0%	0.0%	0.0%
Local shops, Porthcawl	0.0%	0.0%	0.0%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.0%	0.0%	0.0%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.0%	0.0%	0.0%
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.0%	0.0%	0.0%
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.0%	0.0%	0.0%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.0%	0.0%	0.0%
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.0%	0.0%	0.0%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.0%	0.0%	0.0%
Notes:			
Trade diversion (%) based on existing convenience goods shopping patters and location / offer of existing stores.			

TABLE 15: TRADE DIVERSION TO PROPOSED ALDI STORE (£m)

STORE/ CENTRE	1	2	3	TOTAL (£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.01	£0.00	£0.00	£0.01
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.00	£0.00	£0.00	£0.00
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.01	£0.00	£0.00	£0.01
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£2.48	£0.06	£0.33	£2.88
Local shops, Port Talbot Town Centre	£0.04	£0.00	£0.00	£0.04
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£5.15	£0.18	£1.09	£6.43
Local shops, Talbach local centre	£0.00	£0.00	£0.00	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.00	£0.00	£0.01	£0.01
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.00	£0.00	£0.00	£0.00
Pentwyn Baglan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.00	£0.00	£0.00	£0.00
Cwmavon, Local Centre				
Co-Op Food, Heol Jiwbilli, Cwmavon, Port Talbot, SA12 9NR	£0.00	£0.00	£0.00	£0.00
Local shops, Cwmafan village centre	£0.00	£0.00	£0.00	£0.00
Out of Centre				
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.00	£0.00	£0.00	£0.00
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.00	£0.00	£0.00	£0.00
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£0.36	£0.03	£0.04	£0.43
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£1.05	£0.08	£0.12	£1.24
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£0.92	£0.06	£0.12	£1.10
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.00	£0.00	£0.00	£0.00
Premier, Forge Rd, Port Talbot SA13 1PG	£0.00	£0.00	£0.00	£0.00
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£0.00	£0.00	£0.00	£0.00
Spar, Talbot Rd, Neath SA13 1DT	£0.00	£0.00	£0.00	£0.00
Zone 2 (SA11 1 and SA11 2)				
Neath Town Centre				
Local shops, Neath Town Centre	£0.00	£0.00	£0.00	£0.00
Morrisons, Angel Street, Neath, SA11 1RS	£0.02	£0.07	£0.00	£0.09
M&S Green Street East Street 16, Neath SA11 1DH	£0.00	£0.00	£0.00	£0.00
Briton Ferry Town Centre/Neath Road District Centre				
Local shops, Briton Ferry Town Centre	£0.00	£0.00	£0.00	£0.00
Out of Centre				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.01	£0.04	£0.00	£0.06
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.00	£0.00	£0.00	£0.00
Zone 3 (CF33 4, CF33 6 and SA13 2)				
Pyle District Centre				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.01	£0.00	£0.11	£0.12
Local shops, Pyle	£0.00	£0.00	£0.00	£0.00
Kenfig Hill District Centre				
Local shops, Kenfig Hill	£0.00	£0.00	£0.00	£0.00
Margam Local Centre				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.00	£0.00	£0.00
Local shops, Margam local centre	£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
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.00	£0.00	£0.00
Local shops, North Cornelly	£0.00	£0.00	£0.00	£0.00
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£0.00	£0.00	£0.00
OUTSIDE STUDY AREA				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.00	£0.01	£0.01
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.00	£0.00	£0.00	£0.01
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.02	£0.02	£0.00	£0.04
Asda, Castle Street, Maesteg, CF34 9UN	£0.00	£0.00	£0.00	£0.00
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£0.00	£0.01	£0.01
B&M, John Street, Porthcawl, CF36 3BA	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Bryncoch, Main Road, Bryncoch, Neath, SA10 7TW	£0.00	£0.00	£0.00	£0.00
Co-Op Food, Lias Road, Porthcawl, CF36 3AH	£0.00	£0.00	£0.00	£0.00
Co-Op Food, New Road, Porthcawl, CF36 5BA	£0.00	£0.00	£0.00	£0.00
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.00	£0.00	£0.00	£0.00
Iceland, lynyf Walk, Llynfi Road, Maesteg, CF34 9DS	£0.00	£0.00	£0.00	£0.00
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.00	£0.00	£0.00
Iceland, St. Davids Square, Swansea, SA1 3LG	£0.00	£0.00	£0.00	£0.00
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.02	£0.00	£0.00	£0.02
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.00	£0.00	£0.00	£0.00
Lidl, Trallwn Road, Llansamlet, Swansea, SA7 9WL	£0.00	£0.00	£0.00	£0.00
Londis, Laleston Service Station, Laleston, Bridgend, CF32 0LY	£0.00	£0.00	£0.00	£0.00
Londis, Texaco Tondur Service Station, Maesteg Road, Tondur, Bridgend	£0.00	£0.00	£0.00	£0.00
Londis, Y Wern, Bettws, Bridgend, CF32 8RR	£0.00	£0.00	£0.00	£0.00
Morrisons, Canolfan, Brackla, Bridgend CF31 2LL	£0.00	£0.00	£0.00	£0.00
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.00	£0.00	£0.00	£0.00
Tesco Express, Langdon Road, Swansea, SA1 8QY	£0.00	£0.00	£0.00	£0.00
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.00	£0.00	£0.00	£0.00
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.02	£0.07	£0.00	£0.09
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.00	£0.00	£0.02	£0.02
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.00	£0.00	£0.00	£0.01
Tesco Express, District Centre Broadlands, Gentle Way, Bridgend CF31 5EJ	£0.00	£0.00	£0.00	£0.00
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.00	£0.01	£0.01	£0.03
Lidl, Bridgend Retail Park, Lllys Tre Dwr, Bridgend CF31 3LG	£0.00	£0.00	£0.01	£0.01
Local shops, Bridgend Town Centre	£0.00	£0.00	£0.00	£0.00
Local shops, Cymmer village centre	£0.00	£0.00	£0.00	£0.00
Local shops, Maesteg Town Centre	£0.00	£0.00	£0.00	£0.00
Local shops, Neath Abbey local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Pontardawe local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Skewen local centre	£0.00	£0.00	£0.00	£0.00
Local shops, Swansea City Centre	£0.00	£0.00	£0.00	£0.00
Local shops, Tonna local centre	£0.00	£0.00	£0.00	£0.00
Aldi, Llandello Rd, Cross Hands, Llanelli SA14 6RD	£0.00	£0.00	£0.00	£0.00
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.00	£0.00	£0.00	£0.00
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.00	£0.00	£0.00	£0.00
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£0.00	£0.00	£0.00
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.00	£0.00	£0.00
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.00	£0.00	£0.00
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.00	£0.00	£0.00
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.00	£0.00	£0.00
Local shops, Porthcawl	£0.00	£0.00	£0.00	£0.00
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.00	£0.00	£0.00	£0.00
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.00	£0.00	£0.00	£0.00
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.00	£0.00	£0.00	£0.00
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	£0.00	£0.00	£0.00	£0.00
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.00	£0.00	£0.00	£0.00
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	£0.00	£0.00	£0.00	£0.00
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.00	£0.00	£0.00	£0.00
Notes:				
Trade diversion (£m) calculated by applying trade diversion % forecasts to trade draw (£m) by zone.				

TABLE 16: SOLUS AND CUMULATIVE IMPACT OF PROPOSED ALDI STORE, PORT TALBOT

STORE/ CENTRE	2029 PRE-IMPACT TURNOVER (£m)	DIVERSION FROM ICELAND (£m)	DIVERSION FROM M&S NEATH (£m)	RESIDUAL TURNOVER (£m)	DIVERSION TO PROPOSED ALDI (£m)	RESIDUAL TURNOVER (£m)	SOLUS IMPACT (%)	CUMULATIVE IMPACT (%)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)								
Port Talbot Town Centre	£37.20	£0.76	£0.00	£35.59	£2.94	£32.65	-8.3%	-12.2%
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.82	£0.00	£0.00	£0.82	£0.01	£0.80	-1.4%	-1.3%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£2.37	£0.00	£0.00	£0.00	£0.00	£0.00		
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.60	£0.00	£0.00	£0.60	£0.01	£0.59	-1.4%	-1.4%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£30.57	£0.76	£0.00	£31.33	£2.88	£28.45	-9.2%	-6.9%
Local shops, Port Talbot Town Centre	£2.84	£0.00	£0.00	£2.84	£0.04	£2.80	-1.3%	-1.3%
Commercial Road District Centre	£15.63	£0.00	£0.00	£15.63	£6.44	£9.19	-41.2%	-41.2%
Aldi, Commercial Road, Port Talbot, SA13 1LG	£14.63	£0.00	£0.00	£14.64	£6.43	£8.21	-43.9%	-43.9%
Local shops, Talbach local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.99	£0.00	£0.00	£0.99	£0.01	£0.98	-0.9%	-0.9%
Fairway Sandfields, Local Centre								
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.27	£0.00	£0.00	£0.27	£0.00	£0.27	0.0%	0.0%
Pentwyn Baglan Road, Baglan, Local Centre								
Local shops, Baglan village centre	£0.96	£0.00	£0.00	£0.96	£0.00	£0.96	0.0%	0.0%
Cwmavon, Local Centre								
Co-Op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£3.51	£0.00	£0.00	£3.51	£0.00	£3.51	0.0%	0.0%
Local shops, Cwmafan village centre	£0.27	£0.00	£0.00	£0.27	£0.00	£0.27	0.0%	0.0%
Out of Centre								
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.09	£0.00	£0.00	£0.09	£0.00	£0.09	-1.5%	-1.4%
Costcutter, Ysguthan Road, Port Talbot, SA12 6LY	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£3.71	£1.15	£0.00	£4.86	£0.43	£4.43	-8.9%	19.4%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£8.92	£0.04	£0.00	£8.96	£1.24	£7.72	-13.9%	-13.5%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£23.85	£0.11	£0.00	£23.96	£1.10	£22.86	-4.6%	-4.1%
Londis, Texaco Service Station, Princes Margaret Way, Port Talbot	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
Premier, Forge Rd, Port Talbot SA13 1PG	£0.24	£0.00	£0.00	£0.24	£0.00	£0.24	0.0%	0.0%
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	£1.28	£0.00	£0.00	£1.28	£0.00	£1.28	0.0%	0.0%
Spar, Talbot Rd, Neath SA13 1DT	£0.38	£0.00	£0.00	£0.38	£0.00	£0.38	0.0%	0.0%
Zone 2 (SA11 1 and SA11 2)								
Neath Town Centre								
Local shops, Neath Town Centre	£0.59	£0.00	£0.00	£0.59	£0.00	£0.59	0.0%	0.0%
Morrisons, Angel Street, Neath, SA11 1RS	£7.76	£0.00	£0.85	£8.61	£0.09	£8.52	-1.1%	9.7%
M&S Green Street East Street 16, Neath SA11 1DH	£1.99	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
Briton Ferry Town Centre/Neath Road District Centre								
Local shops, Briton Ferry Town Centre	£0.65	£0.00	£0.00	£0.65	£0.00	£0.65	0.0%	0.0%
Out of Centre								
Lidl, Briton Ferry Road, Neath, SA11 1AS	£5.23	£0.00	£0.00	£5.23	£0.06	£5.18	-1.1%	-1.1%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£1.79	£0.00	£0.00	£1.79	£0.00	£1.79	0.0%	0.0%
Zone 3 (CF33 4, CF33 6 and SA13 2)								
Pyle District Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£15.16	£0.00	£0.00	£15.16	£0.12	£15.04	-0.8%	-0.8%
Local shops, Pyle	£0.59	£0.00	£0.00	£0.59	£0.00	£0.59	0.0%	0.0%
Kenfig Hill District Centre								
Local shops, Kenfig Hill	£1.17	£0.00	£0.00	£1.17	£0.00	£1.17	0.0%	0.0%
Margam Local Centre								
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.84	£0.00	£0.00	£0.84	£0.00	£0.84	0.0%	0.0%
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	0.0%
North Cornelly Local Service Centre								
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.29	£0.00	£0.00	£0.29	£0.00	£0.29	0.0%	0.0%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.59	£0.00	£0.00	£0.59	£0.00	£0.59	0.0%	0.0%
Local shops, North Cornelly	£0.92	£0.00	£0.00	£0.92	£0.00	£0.92	0.0%	0.0%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£1.35	£0.00	£0.00	£1.35	£0.00	£1.35	0.0%	0.0%
OUTSIDE STUDY AREA					£0.24			

Superseded

NEATH PORT TALBOT COUNTY BOROUGH COUNCIL
PROPOSED ALDI FOODSTORE, BURROWS YARD, PORT TALBOT

TABLE 17: TOTAL SOLUS AND CUMULATIVE IMPACT OF PROPOSED ALDI STORE - PORT TALBOT TOWN CENTRE AND TAIBACH DISTRICT CENTRE

[illegible]

Superseded

Appendix C: linked trip analysis

LINKED TRIPS ASSOCIATED WITH MAIN AND TOP-UP FOOD SHOPPING - STORES IN PORT TALBOT

	Total	Linked Trip?		Port Talbot Town Centre			Taibach District Centre		
	No.	No.	%	No.	% Total Shoppers	% Total Links	No.	% Total Shoppers	% Total Links
LAST MAIN FOOD SHOPPING TRIP									
ALDI, Commercial Road	47	8	17.0%	4	8.5%	50.0%	3	6.4%	37.5%
Filco, Commercial Road	2	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
B&M, Port Talbot town centre	2	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Home Bargains, Port Talbot town centre	2	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Tesco, Port Talbot town centre	88	29	33.0%	25	28.4%	86.2%	0	0.0%	0.0%
Local shops, Port Talbot town centre	0	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Iceland, Baglan	9	3	33.3%	0	0.0%	0.0%	0	0.0%	0.0%
Lidl, Baglan	26	8	30.8%	1	3.8%	12.5%	0	0.0%	0.0%
Morrisons, Baglan	76	17	22.4%	7	9.2%	41.2%	0	0.0%	0.0%
OTHER MAIN FOOD SHOPPING TRIP									
ALDI, Commercial Road	45	6	13.3%	5	11.1%	83.3%	0	0.0%	0.0%
Filco, Commercial Road	2	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
B&M, Port Talbot town centre	2	2	100.0%	2	100.0%	100.0%	0	0.0%	0.0%
Home Bargains, Port Talbot town centre	0	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Tesco, Port Talbot town centre	88	34	38.6%	25	28.4%	73.5%	0	0.0%	0.0%
Local shops, Port Talbot town centre	0	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Iceland, Baglan	5	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Lidl, Baglan	30	8	26.7%	4	13.3%	50.0%	0	0.0%	0.0%
Morrisons, Baglan	74	9	12.2%	3	4.1%	33.3%	1	1.4%	11.1%

LAST TOP-UP FOOD SHOPPING TRIP									
ALDI, Commercial Road	16	3	18.8%	3	18.8%	100.0%	0	0.0%	0.0%
Filco, Commercial Road	3	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
B&M, Port Talbot town centre	2	2	100.0%	0	0.0%	0.0%	0	0.0%	0.0%
Home Bargains, Port Talbot town centre	1	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Tesco, Port Talbot town centre	47	10	21.3%	9	19.1%	90.0%	0	0.0%	0.0%
Local shops, Port Talbot town centre	19	7	36.8%	6	31.6%	85.7%	0	0.0%	0.0%
Iceland, Baglan	5	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Lidl, Baglan	12	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Morrisons, Baglan	26	4	15.4%	0	0.0%	0.0%	0	0.0%	0.0%
OTHER TOP-UP FOOD SHOPPING TRIP									
ALDI, Commercial Road	13	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Filco, Commercial Road	2	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
B&M, Port Talbot town centre	3	3	100.0%	0	0.0%	0.0%	0	0.0%	0.0%
Home Bargains, Port Talbot town centre	3	2	66.7%	0	0.0%	0.0%	0	0.0%	0.0%
Tesco, Port Talbot town centre	48	11	22.9%	11	22.9%	100.0%	0	0.0%	0.0%
Local shops, Port Talbot town centre	16	2	12.5%	2	12.5%	100.0%	0	0.0%	0.0%
Iceland, Baglan	8	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Lidl, Baglan	8	0	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Morrisons, Baglan	23	5	21.7%	2	8.7%	40.0%	0	0.0%	0.0%

Notes:
Linked trip data taken from Avison Young / ALDI 2023 household survey.

Superseded



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