

Retail Addendum 2 – Further update to Retail Impact Assessment

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

Burrows Yard, Port Talbot

March 2025

Contents

1. Introduction 3

2. Future of the Aldi Taibach Store and Data Updates 4

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

4. Summary Response to Nexus Review..... 12

5. Conclusions 14

Appendices

- Appendix 1 Retail Impact Assessment Tables – Update
- Appendix 2 Letter from TJ Morris regarding Aldi Taibach store
- Appendix 3 Retail Impact Assessment Methodology - Update

Report title: Retail Addendum 2 – Further update to Retail Impact Assessment

Prepared by: Steve Robb

Status: Final

Date: March 2025

For and on behalf of Avison Young (UK) Limited

1. Introduction

- 1.1 This Retail Addendum 2 (March 2025) has been prepared by Avison Young. It is submitted in support of a planning application, on behalf of Aldi Stores Ltd and Neath Port Talbot County Borough Council ("the applicant"), for the development of a discount foodstore and coffee shop (with drive thru) in Port Talbot. The application has reference number P2024/0339 and was validated on 18 June 2024.
- 1.2 This Addendum 2 report follows the submission of an Addendum in December 2024 and the subsequent review, titled 'Assessment of Retail & Town Centre Planning Policy' by Nexus Planning in February 2025. This report will hereafter be referred to as the 'Nexus Review'. Those comments will be considered and responded to within this report. However, the principal reasons behind the preparation of this second update is the material change in circumstances relating to the future of Aldi's existing store at Commercial Road in Port Talbot. This will be explained in Section 2 of this report, with the effects on the retail impact assessment discussed in subsequent chapters.
- 1.3 As before, this report should be read alongside the other retail policy sections within the original reports, relating to the sequential assessment, healthchecks for defined centres and considerations of planned investment in centres.
- 1.4 This Addendum report is therefore divided into the following sections:
 - Section 2: Future of the Aldi Taibach Store and Data Updates
 - Section 3: Convenience Quantitative Goods Need and Impact
 - Section 4: Summary Response to Nexus Review
 - Section 5: Conclusions

2. Future of the Aldi Taibach Store and Data Updates

- 2.1 This section will firstly set out the changed circumstances for Aldi's existing store at Taibach before moving onto the consequent effects on the approach to the retail impact assessment. It will also detail new data inputs that have been released since the Addendum issued in December 2024.

Aldi's Taibach Store

- 2.2 Aldi are a leaseholder of their store in Taibach and had originally planned to keep this open in the event that this planning application (ref. P2024/0339) was successful. Their lease on that building extends to June 2029.
- 2.3 In February 2025, marketing material was issued to sell the property. We have been informed that TJ Morris Ltd. were the successful party in this process, with this deal completed on 14 March. This has been confirmed by the enclosed letter from TJ Morris (Appendix 2).
- 2.4 As noted within the letter, discussions are expected to commence with Aldi shortly about securing vacant possession of the building ahead of the lease expiry. TJ Morris have confirmed the new store would employ 50 people and would secure a long-term, future use of the building by an established national retailer.
- 2.5 In light of these events, Aldi will have to close their Taibach store in the future, either at the end of the lease period, or earlier, depending on the outcome of the current planning application for a new store at Afan Way. Given the significance of this change in circumstance, the retail impact assessment has been updated accordingly.
- 2.6 The opportunity has also been taken to update the sales density data and baseline information from Global Data and Experian, both of which were issued after the last Addendum was prepared. These changes are explained in more detail below.

Updated Data Sources

- 2.7 Experian recently released their latest data set which is used within the retail impact assessment to provide population levels, growth projections and per capita expenditure information. This was released alongside a new Retail Planner Briefing Note 22 (March 2025). The briefing note includes Experian's latest projections for expenditure and sales density growth into the future.
- 2.8 In addition to the above, a new version of Global Data has been issued, with this referenced in the Nexus Review noted earlier. This new data set has recently been further updated, in March 2025, with this now incorporated across the tables.
- 2.9 Finally, the base and test years have been updated to 2025 and 2030 respectively to reflect the passage of time.

3. Convenience Goods Quantitative Need and Impact

- 3.1 In order to ensure the retail impact assessment fully reflects the up-to-date circumstances relating to Aldi's future at their existing Taibach store, and other recent data inputs, the quantitative need and impact assessment has been updated. The findings of this exercise, alongside responses to certain parts of the Nexus Review, are enclosed in the Section below.

Quantitative Impact

Table 1a – Turnover of Proposed Development

- 3.2 Table 1a of **Appendix 1** estimates the convenience and comparison goods turnover of the proposals based on the latest dataset from Global Data, released in March 2025.
- 3.3 The proposed floorspace of the development proposals has not changed. The retail and customer area (including tills and packing areas) remains 1,344 sq.m. The net retail sales area of 1,154 sq.m is given over to the sale of convenience goods (80% / 923 sq.m), with the remainder used for the sale of a purely ancillary range of non-food (comparison) goods (20% / 231 sq.m).
- 3.4 Utilising the latest Global Data information (issued March 2025), converted to 2022 prices, the store would be projected to have a convenience turnover of £9.64m in 2030, and a comparison goods turnover of £2.07m. This is a total turnover of £11.71m and represents a reduction on the previous figures. These turnovers have been grown to the test year in accordance with the Experian Retail Planner Briefing Note 22 (March 2025).

Table 1b – Uplift in Aldi Turnover

- 3.5 As the proposals now represent a replacement store, we have assumed that 100% of the existing store turnover from Taibach would transfer to the proposals. As there remains an uplift in floorspace, as a worst-case scenario we have assumed that this increase will translate into a further increase in turnover. The uplift measures 297 sq.m, with this split 238 sq.m for convenience goods and 59 sq.m for comparison goods.
- 3.6 Based on the latest sales density calculations from Global Data, this will result in an turnover of £2.48m for convenience goods and £0.48m for comparison goods at the base year (2025). At the test year (2030) this is anticipated to increase marginally to £0.5m for comparison goods, with the convenience turnover remaining the same.
- 3.7 Overall, the uplift in floorspace will provide a turnover of £2.98m at 2030, which we note is very modest.

Table 1c – Turnover of Home Bargains, Taibach

- 3.8 In order to provide a comprehensive analysis, Table 1c considers the potential turnover of the Home Bargains store in the Taibach unit. This assumes that if the Aldi planning application is approved, that an early surrender of that lease may occur, however, this is only an assumption at this stage.
- 3.9 Moreover, as the extent of the Home Bargains proposals for that unit are unknown at this stage, we have retained the sales floorspace of the Aldi store and adopted their standard food/non-food split to estimate a turnover for the unit. This is 50%/50%.

- 3.10 We therefore calculate that the Home Bargains unit would have a total turnover of £4.10m, with this split between a convenience turnover of £1.94m and comparison turnover of £2.16m.

Population (Table 2 (a))

- 3.11 As a result of new baseline data from Experian, the population level with the catchment area has been updated. This has also been amended to reflect the updated base and test years.
- 3.12 The population data for the 3 Zones was sourced directly from Experian Location Analyst data (March 2025 Report). The baseline population has then been projected forward to the test year of 2030 in line with Experian's growth forecasts.
- 3.13 On this basis, the information from Experian indicates for Zone 1, the population is 39,129 in 2025 increasing to 39,687 in 2030.
- 3.14 Overall, the Study Area population is 78,922 in 2025 increasing to 80,232 in 2030.

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

- 3.15 The per capita convenience base expenditure data for our catchment area has been updated to reflect Experian's latest data set. It is sourced from Experian Location Analyst data (March 2025 report). Our analysis of convenience goods (Table 2b expenditure capacity then draws upon 'forecast' growth rates as set out under Appendix 4a, of the Experian Retail Planner Briefing Note 22 (March 2025).
- 3.16 In terms of an allowance for Non-Store Retail Trade (NSRT) / Special Forms of Trading (SFT) – such as online shopping, etc. – our assessment is based on the allowance identified at Appendix 3, of Experian's Retail Planner Briefing Note 22, March 2025. This is based upon assumptions by Experian in regard to the sourcing of on-line food purchases (i.e. the proportion which is actually supplied from the shelves of stores vs. deliveries from non-retail distribution centres to private residences).

Total Convenience Goods Expenditure (Table 2 (d))

- 3.17 Table 2d of **Appendix 1** combine population and per capita expenditure estimates to establish total available convenience expenditure respectively within the Study Area based on the latest Experian data. Table 2d shows that there will be approximately £198.55m convenience goods expenditure within the Study Area at our test year in 2030. This is a significant increase over the previous Experian figures. For Zone 1 at the test year, this would be £98.05, £41.41m for Zone 2 and £59.09m for Zone 3.

Convenience Goods Shopping Patterns (£m) in 2025 and 2030 (Tables 3, 4 and 5)

- 3.18 Table 3 continues to show the convenience shopping patterns drawn from the household survey that was commissioned from NEMS. These are split between first choice and second choice main food shopping, followed by first and second choice top up food shopping.
- 3.19 Tables 4 and 5 undertake the conventional process of applying the total convenience goods expenditure for each Zone to the 'main', 'second choice main', 'top-up (main)', 'top-up (second choice)' convenience goods shopping patterns as established by the household telephone shopper survey. This assumes that the split between main food shopping and top-up shopping is 70%/30%, with first choice and second choice for each also split 70%/30%.
- 3.20 A number of key findings from these tables are that:
- **81.7%** (£80.1m in 2030) of the convenience goods expenditure generated by Zone 1 is retained within the area. Therefore, **18.3%** (£17.95m) leaks elsewhere with this mainly flowing to Zone 2 or beyond the study area;

- The primary convenience shopping destination within Zone 1 is the Tesco store within Port Talbot Town Centre, with a total turnover of **£34.2m** in 2030. Collectively, Port Talbot Town Centre has a turnover of £41.7m;
- This is followed by the Morrisons store, located at Baglan Industrial Park with a total turnover of **£26.7m**. The Aldi store in Taibach has a turnover of **£16.4m** and the Lidl store, **£10m**;
- Stores in Zone 1 draw high levels of trade from Zone 3 and some from Zone 2; and
- We note that the Iceland store in Port Talbot Town Centre was projected to have a turnover of **£2.7m** by 2030 but understand this has now closed. This change will be reflected later in the tables.

3.21 Although the findings demonstrate relatively high levels of expenditure retention within Zone 1, the household survey also reveals significant levels of inflow from the surrounding area. This is consistent with the Council's retail study from 2013, the Neath Port Talbot Retail Study.

3.22 It is notable that our household survey only considered inflows from our Zones 2 and 3, whereas the Council study in 2013 identified further inflows from the wider Council area. We consider this to be relevant to our assessment of need.

Existing Shopping Patterns for Zone 1, Foodstore Benchmark Turnover Analysis 2025/2030 and Retail Capacity Analysis (Zone 1) (Tables 6A, 6B +6C)

3.23 Table 6A sets out the expenditure patterns from Zone 1 discussed above. Table 6B then examines benchmark turnovers within Zone 1, utilising floorspace information from both the Neath Port Talbot Retail Study (2013) and a more recent planning application, P2017/0516, comprising the Retail Assessment (May 2017) and Retail Assessment Addendum Report (July 2017).

3.24 These net floorspace figures are then multiplied by the convenience and comparison split set out in Global Data 2024 (March 2025), to provide a net convenience floorspace. The benchmark sales density figures are recalculated to a 2022 price year and then multiplied by the floorspace to provide an expected benchmark turnover level for 2025 and 2030.

3.25 The expected benchmark turnover level within Zone 1 in 2025 is £84.62m, with this growing marginally to £84.64m by 2030. This calculation adopts the sales density growth figures set in Figures 4a of Experian Planner Briefing Note 22 (March 2025).

3.26 Table 6C considers retail capacity within Zone 1. The contents are drawn from the previous tables to consider the level of expenditure retention and inflow into the area. Noting that the area covered by our household survey was less extensive than for the Council's 2013 Retail Study, a conservative assumption of an additional 6% inflow has been assumed. We note that the Council's 2013 Study assumed 5% (ref. Table 9c of Appendix C) but this figure related to expenditure outwith the Council area only. It is clear from that report that there is inflow from other parts of the Council area beyond our Zones 1-3.

3.27 We consider these conclusions to be robust particularly given the additional evidence from the more recent Bridgend Retail Study Update (May 2022), which identified in Table 4 of that report, that there was approximately £18.9m of convenience expenditure flowing into Port Talbot from the Bridgend Council area. We are therefore confident that the assumptions we have adopted are conservative and in reality, the inflow beyond Zones 1-3 of our assessment would more than likely be greater than the 6% adopted.

- 3.28 In total, we assume that the turnover of stores within Zone 1 is £98.08m in 2025, growing to £98.02m in 2030. Once benchmark turnovers are removed, this leaves residual capacity of £29m in 2025 and £29.1m in 2030.
- 3.29 Given this level of significant need, confirmed by the latest Experian expenditure and population figures, it is clear that this aspect of planning policy has been satisfied. We note that this was previously confirmed within the Nexus Review (February 2025).
- 3.30 Finally, we also consider there to be a range of qualitative need considerations as set out within the original Statement, that are also of relevance to the assessment against policy. Please refer to our original Statement for more details.

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

- 3.31 The proposal's convenience goods trade allocation / diversion is set out at Tables 7 and 8 of **Appendix 1**. As before, in the absence of similar guidance for Wales, reference has been had to the Practice Guidance for England. This states that a common starting point for the exercise is to consider the catchment's existing shopping patterns (in this case provided by the NEMS household survey) and to then apportion the trade to be diverted based upon the character of development ('like affecting like'), popularity (based upon existing shopping patterns / Avison Young observations), geographic location (proximity) and brand loyalty factors (i.e. are catchment residents already using Aldi).
- 3.32 With the closure of the Iceland store in Port Talbot Town Centre and M+S store in Neath, post-dating the household survey, adjustments have been made to turnovers. We previously considered this within the first Addendum, dated December 2024, and note that Nexus accepted our apportionments for the M+S Neath store closure. For the Iceland store, we note that Nexus considered at paragraphs 3.71 and 3.72 of their review that our assumptions were incorrect and that, in their view, a higher percentage of that store's trade would move to the Iceland: The Food Warehouse within the town. Their reasoning for this, was brand loyalty and comparability of offer.
- 3.33 Our own assumptions were formed on the basis that we anticipated that the majority of visitors to the town centre store were less likely to visit for the nature of the Iceland offer specifically, but as a result of its convenient location in the town centre and as part of a wider shopping trip to Port Talbot. This was backed up by the fact the store only featured in the household shopping results as a top-up destination, rather than for main food. In our view, this made it less likely that those visitors, who potentially don't have access to a car, given visits to the town centre, would be less likely to swap to the new store.
- 3.34 Notwithstanding, we have taken on board Nexus' comments and increased the diversion from the closure of the Iceland town centre store to the Food Warehouse from 10% to 45%. This means that in our updated assessment that 55% would remain in the town centre rather than the original 90%, with this principally going to the Tesco store.
- 3.35 Beyond the above amendments, the trade draw within Tables 7 and 8 matches the original Statement (dated May 2024) and first Addendum (December 2024). with 80% expected to be drawn from Zone 1, 5% from Zone 2 and 15% from Zone 3. We note that these assumptions were supported within the Nexus Review at paragraph 3.75.
- 3.36 Within Table 9, we have considered both solus and cumulative impact matters. This largely matches the assumptions within the original Addendum report, however, also factors in the future closure of the Aldi store at Taibach alongside the opening of the Home Bargains store. Additional columns have been added to the tables to reflect that material change, to consider cumulative effects.

- 3.37 Although it is acknowledged that the closure of the Aldi store and opening of Home Bargains will reduce the turnover of the Taibach (Commercial Road) centre, it is important to note that this is not a consequence of these planning application proposals. This will occur regardless of the outcome of the determination of this application for a new Aldi store at Afan Way. This is instead a commercial reality and in our view, is not a negative consideration but instead a positive outcome, given that the new owner will continue to provide an anchor offer and draw for the District Centre into the future.
- 3.38 The tables firstly consider the likely trade diversions from the Aldi store uplift. Within the Nexus Review they comment that most of the diversions we set out within our Addendum were reasonable, except for the assumptions around the amount of trade to be diverted from the Taibach store and also those beyond the catchment area. Clearly the first point is no longer a consideration, given that store's future closure and replacement with a Home Bargains. We also acknowledge the points made by Nexus regarding the recapture of trade beyond the area and have reduced this down from 16.3% of the store's uplift in turnover, to 6.8%. This means that 87.7% of the store's uplift in turnover will be derived from diversions from Zone 1 retail provision.
- 3.39 Our updated assessment concludes that the majority of diversion will continue to come from the overtrading Tesco store in Port Talbot Town Centre, with this being 36.2% (£0.9m) of the uplift in turnover for the Aldi at Afan Way. The household survey confirmed that this store has a turnover of over approx. £34m, against an expected benchmark level of £25.44m. This minor level of trade diversion will therefore have no real consequence for the future turnover of that store.
- 3.40 Other large diversions are expected from the Morrisons and Lidl stores nearby, being 19.8% (£0.49m) and 23.3% (£0.58m) respectively. Minor diversions are expected from the Lidl and Morrisons stores in Neath and the ASDA at Pyle.
- 3.41 As can be seen from Table 9, this solus impact is expected to result in only a 2.3% impact on convenience trade within Port Talbot Town Centre. We consider this to be very modest in nature and would not affect the longer-term performance of the centre, particularly once the non-food offer is also considered. We note that this was assessed within the Nexus Review, with Port Talbot Town Centre found to have a comparison turnover of £45m in 2029.
- 3.42 The opening of a new Home Bargains within Taibach (Commercial Road District Centre) has also been modelled, even though that is unlikely to require the submission of a planning application. As there is already a Home Bargains within the town, it is expected that at least 40% of new store's convenience turnover will be diverted from that store. We've also assumed that 25% will come from the B+M within Port Talbot Town Centre and 5% from the Tesco store. Overall, this will result in a £1.4m diversion from the town centre, resulting in a 3.4% impact on the centre's convenience turnover.
- 3.43 To assess cumulative impact, these diversions are then combined within the following column. Our assessment concludes that the cumulative impact on the Town Centre's convenience trade is expected to be 5.6%. It should be noted that the majority of this impact relates to the opening of a new Home Bargains at Taibach, within a defined District Centre, and is not a result of these application proposals. Moreover, the level of impact expect would be significantly less once the comparison goods turnover of the centre is factored in, as per the Nexus Review. We therefore consider this to be very minimal and acceptable from a policy perspective.

Summary

- 3.44 The further updates made to the retail impact assessment enclosed within this Addendum 2, improve the case for the planning application proposals in the following ways:

- The updated circumstances relating to the future closure of the Aldi store at Taibach and its replacement by a Home Bargains are outwith the control of the planning system and instead commercial events that will occur regardless of the outcome of this planning application. With that in mind, the previous expected trade impact on the Commercial Road District Centre (Taibach) will still occur but not as a result of these application proposals. This is an important consideration.
- Updates to the assessment to reflect the above, has re-focused attention to the expected uplift in turnover instead of the full proposals for the Aldi store at Afan Away. As a result of these changes, the previously expected minor diversions and trade impact on Port Talbot Town Centre from the proposals has reduced considerably.
- The updated data from Experian relating to expenditure and population growth further establish the quantitative need case that is present within Zone 1. This is indicative of a need for more choice in shopping provision within the area, with this further supported through the qualitative considerations we have set out in the original Planning and Retail Statement.
- Overall, the proposed development would only have minor solus impacts on Port Talbot Town Centre, particularly given this location is trading well above benchmark levels. Our cumulative impact assessment also reaches the same conclusion, ensuring the future good health of Port Talbot Town Centre following the opening of both developments.
- In terms of Commercial Road District Centre (Taibach), it is apparent that the turnover of the centre will change as a result of the circumstances outlined above, with this having a greater comparison focus in the future. Importantly, these changes are not through any direct trade diversions from the application proposals. Notwithstanding, the re-occupation of the current Aldi unit by a national retailer is positive news and will ensure the health of the centre into the future.

3.45 Drawing the above points together, it is clear that proposals do comply with both national and local retail planning policies, including Policy R3 of the Local Development Plan and therefore can be supported.

4. Summary Response to Nexus Review

- 4.1 We have reviewed the report dated February 2025 by Nexus Planning and provide summary comments below, focusing principally on the 'Summary and Conclusions' section.

Need

- 4.2 We welcome Nexus' conclusions that there is a quantitative need for the development proposals and that this element of policy is satisfied. We also note that, in our view, these conclusions are only further strengthened by the updated data sets that has been used within this report to update our assessment findings.
- 4.3 Overall, we are pleased to note that the proposals are considered to satisfy Part 1 of Policy R3 of the LDP.

The Sequential Test

- 4.4 We note that Nexus agree with our conclusions regarding the availability and suitability of 5 of the 6 sites assessed under the sequential test and we welcome those conclusions.
- 4.5 In respect of the 6th site, which is the existing Aldi store at Taibach, the Nexus Review advised that further information on the availability of adjacent sites (WM Glazing and Fire Service) would be helpful to clarify if these were available for redevelopment. The commercial circumstances outlined earlier in this report, with the ownership of the site transferring from a third party to TJ Morris, to enable the site's future occupation by Home Bargains provide sufficient clarification that the site is not available for redevelopment. The application proposals therefore fully satisfy the sequential test and we trust Nexus will agree with those conclusions in their final review.

Impact

- 4.6 In terms of retail impact policy matters, we note Nexus' concerns principally related to the future health of Taibach District Centre. These stemmed from their conclusions over the direct financial impact from projected trade diversions to the new store, alongside a wider concern about the potential future closure of this unit.
- 4.7 It is apparent that real world events, as described in Section 2 of this report, have significantly affected these conclusions. Not only have they altered Aldi's future aspirations for serving Port Talbot from two stores, but more helpfully, confirm that this unit will be re-occupied by Home Bargains in the future. The acquisition of the unit by TJ Morris, as confirmed in the appended letter (Appendix 2), provide reassurance on this matter. It is important to note that these events have occurred separate from these application proposals and will move forward regardless of the outcome of this planning application.
- 4.8 In light of the above, the previous concerns over financial impact on Taibach District Centre are no longer appropriate. These events will take place separate from the application process currently before the Council not as a result of it. Instead, Taibach District Centre will continue to evolve, with Home Bargains operating as the anchor in future, ensuring the vitality and viability of the centre in the longer term.
- 4.9 Our updated modelling reveals that as a result of these changes the financial impact on Port Talbot Town Centre, and other centres, is even further reduced. We note that concerns were already less

pronounced for Port Talbot Town Centre given the overall turnover and performance of the centre and minimal levels of trade diversions predicted.

- 4.10 Notably, the Nexus Review indicated that the only conflict with policy related to the potential effects on Taibach District Centre, which we consider are now fully resolved given the above. The application proposals will clearly not have a negative effect on the future of either Taibach District Centre or Port Talbot Town Centre, as demonstrated through the enclosed retail impact assessment and as a result, in our view, the proposals comply with Part 3 of Policy R3 of the LDP.

5. Conclusions

- 5.1 This Addendum 2 report has been prepared in support of planning application (P2024/0339) proposing to deliver a new discount foodstore and coffee shop (with drive thru) in Port Talbot. It should be read alongside the original Planning and Retail Statement (May 2024), which respectively covers wider retail planning policy topics relating to the sequential assessment, town centre healthchecks and impacts on planned investment. It also follows the Addendum report dated December 2024, to reflect the changed commercial context since that time and utilises the latest data sets from Experian and Global Data.
- 5.2 The acquisition of the existing Aldi store building within the Commercial Road District Centre (Taibach) has affected the company's plans to operate from two locations, at least until the end of their lease in 2029. The successful bidder for the building, TJ Morris, intend to occupy this in the future as a Home Bargains store, and will proceed with discussions around an early surrender of the lease with our client. These events were unexpected at the time of the original retail impact assessments but given their consequential nature required the retail impact assessment to be updated.
- 5.3 Based on the updated assessment enclosed, our overall conclusions are that:
- Updated population and expenditure growth data from Experian fully confirms the significant level of quantitative need within the catchment area. This is in addition to the clear qualitative need case within the area. We note that Nexus agree with our conclusions in respect to this matter. This need will only increase once the Aldi store closes in the District Centre (Taibach) at the end of their lease;
 - As the proposals now represent a relocation rather than a second store for the town, we have assumed that the majority of turnover for the new store will be derived from the Aldi store that will close. Given the greater floorspace within the larger store, an assessment has been made of the impact of the floorspace uplift only;
 - Our assessment has identified that whilst there will be some diversions from Port Talbot Town Centre, these will have only an approximately 2.3% impact on convenience turnover of the centre. Since the centre is overtrading against expected benchmark convenience turnover levels, this is a very modest level of impact with no long-term implications for the centre's performance;
 - With the closure of the Aldi and opening of a Home Bargains store, the turnover of the Commercial District Centre (Taibach) will inevitably change, although it is important to note that this is not a result of these application proposals, but instead a consequence of the commercial market. The new Home Bargains store will therefore replace the Aldi as an anchor for that centre, ensuring its long-term vitality and viability;
 - The effect of a new Home Bargains store in that District Centre has also been modelled from a cumulative impact perspective, and also found to only have minimal impacts on Port Talbot Town Centre. Those impacts are largely from the Home Bargains occupation though and will occur regardless of the outcome of the planning application for a replacement Aldi store at Afan Way;
 - Overall, it is apparent that the application proposals will not have any significant adverse impact on any policy protected centres in the catchment area;
 - Indeed, it is considered that there could instead be increased linked trips with Port Talbot Town Centre, as a result of the development, with this also accepted by Nexus in their review of the application proposals;

- As the proposals are located within an area that suffers from levels of deprivation, the proposals can offer high quality and affordable goods in a walkable location, where they can greatly benefit the local community;
- The introduction of Aldi at the site will reduce health inequality within the surrounding local catchment area, by providing straightforward access to a wide range of fresh produce and healthy food at heavily discounted prices in a time of high-consumer demand and general price inflation; and
- The application proposals therefore fully comply with national planning policies set out in PPW alongside local policies relating to retail matters.

Appendix 1

Retail Impact Assessment Tables – Update

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM 2

TABLE 1A. TURNOVER OF PROPOSED DEVELOPMENT

Proposed new Aldi foodstore, Land North of Afan Way, Aberavon, Port Talbot		Gross Floorspace (sq. m)	Retail and Customer Area (sq.m)	Net Retail Sales Area (sq. m)	Turnover per sq. m in 2025 (£m)	Period to Test Year					
						2025	2026	2027	2028	2029	2030
Aldi Foodstore	Convenience	2,000	1,344	923	£10,441	£9.64	£9.64	£9.64	£9.64	£9.64	£9.64
	Comparison			231	£8,058	£1.86	£1.89	£1.93	£1.98	£2.02	£2.07
	Total			1,154	-	£11.50	£11.53	£11.57	£11.62	£11.66	£11.71

TABLE 1B. UPLIFT IN ALDI TURNOVER AT ABERAVON, PORT TALBOT

Existing Aldi Foodstore		Proposed New Aldi Foodstore		Floorspace Uplift (sq.m)	Turnover per sq. m in 2025 (£m)	Period to Test Year					
Floorspace Type	Net Retail Sales Area (sq.m)	Floorspace Type	Net Retail Sales Area (sq.m)			2025	2026	2027	2028	2029	2030
Convenience	686	Convenience	923	238	£10,441	£2.48	£2.48	£2.48	£2.48	£2.48	£2.48
Comparison	171	Comparison	231	59	£8,058	£0.48	£0.48	£0.48	£0.48	£0.49	£0.50
Total	857	Total	1154	297	-	£2.96	£2.96	£2.96	£2.96	£2.97	£2.98

TABLE 1C. TURNOVER OF HOME BARGAINS STORE AT TAIBACH

New Home Bargains in former Aldi store, Taibach		Gross Floorspace (sq. m)	Net Retail Sales Area (sq. m)	Turnover per sq. m in 2025 (£m)	Period to Test Year					
					2025	2026	2027	2028	2029	2030
Home Bargains	Convenience	-	429	£4,525	£1.94	£1.94	£1.94	£1.94	£1.94	£1.94
	Comparison		429	£4,525	£1.94	£1.97	£2.02	£2.06	£2.11	£2.16
	Total		857	-	£3.88	£3.91	£3.95	£4.00	£4.05	£4.10

Notes:

a. Gross floorspace of proposed Aldi foodstore sourced from architectural drawings

b. Net sales area and convenience goods / comparison goods floorspace split of Aldi provided by operator. Home Bargains split assumed to be 50%/50%.

c. Sales density for Aldi Stores Ltd derived from GlobalData 'Convenience and Comparison Goods Sales Densities of Major Grocers' (2024 Edition), published March 2025. Then converted to a 2022 price year using price indices set out in Experian Retail Planner Briefing Note 22 (March 2025) - Appendix 4b.

d. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b (Page 14) of Experian Retail Planner Briefing Note 22 (March 2025)

2022 Prices

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

TABLE 2(a): POPULATION WITHIN EACH ZONE

ZONE	2023	2024	2025	2026	2027	2028	2029	2030
Zone 1	-	39,010	39,129	39,256	39,361	39,454	39,553	39,687
Zone 2	-	16,113	16,156	16,237	16,280	16,324	16,360	16,433
Zone 3	-	23,521	23,637	23,742	23,840	23,937	24,029	24,112
TOTAL	-	78,644	78,922	79,235	79,481	79,715	79,942	80,232
Notes: a. Postcode sectors SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1 represent Zone 1. Study Area includes postcode sectors SA11 1 and SA11 2 (Zone 2), and CF33 4, CF33 6 and SA13 2 (Zone 3). b. Base population derived from Experian Location Analyst data (March 2025 Report) c. Base year taken as 2025 and test/design year as 2030								

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

ZONE	2023	2024	2025	2026	2027	2028	2029	2030
Zone 1	£2,679	£2,649	£2,644	£2,639	£2,636	£2,633	£2,631	£2,628
Zone 2	£2,732	£2,702	£2,697	£2,691	£2,689	£2,686	£2,683	£2,681
Zone 3	£2,657	£2,628	£2,623	£2,618	£2,615	£2,613	£2,610	£2,607
ANNUAL GROWTH	-2.9%	-1.1%	-0.2%	-0.2%	-0.1%	-0.1%	-0.1%	-0.1%
Notes: a. Per capita expenditure derived from Experian Location Analyst data (March 2025 Report) and rebased to 2022 prices. b. Expenditure growth taken from Figure 7 of Experian Retail Planner Briefing Note 22 (March 2025)								
2022 Prices								

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

ZONE	2023	2024	2025	2026	2027	2028	2029	2030
Zone 1	£2,545	£2,514	£2,507	£2,496	£2,491	£2,483	£2,478	£2,471
Zone 2	£2,596	£2,564	£2,557	£2,546	£2,541	£2,533	£2,528	£2,520
Zone 3	£2,525	£2,494	£2,487	£2,476	£2,471	£2,464	£2,459	£2,451
ANNUAL DEDUCTION	5.0%	5.1%	5.2%	5.4%	5.5%	5.7%	5.8%	6.0%
Notes: a. Per capita expenditure derived from Experian Location Analyst data (March 2025 Report) and rebased to 2022 prices. b. Expenditure excludes Non Store Retail Trade in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 22 (March 2025)								
2022 Prices								

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

ZONE	2023	2024	2025	2026	2027	2028	2029	2030
Zone 1	-	£98.08	£98.08	£97.99	£98.05	£97.98	£98.02	£98.05
Zone 2	-	£41.32	£41.30	£41.34	£41.36	£41.35	£41.35	£41.41
Zone 3	-	£58.67	£58.78	£58.79	£58.92	£58.97	£59.08	£59.09
TOTAL	-	£198.07	£198.16	£198.13	£198.33	£198.30	£198.45	£198.55
Notes: a. Total available expenditure (2(d)) calculated by multiplying population from Table 2(a) by expenditure per head (minus NSRT deduction) from Table 2(c)								
2022 Prices								

TABLE 3: CONVENIENCE GOODS SHOPPING PATTERNS (%)

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

TABLE 4: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2025

	FIRST CHOICE MAIN FOOD SHOPPING					SECOND CHOICE MAIN FOOD SHOPPING					FIRST CHOICE TOP UP FOOD SHOPPING					SECOND CHOICE TOP UP FOOD SHOPPING				
				TOTAL					TOTAL					TOTAL					TOTAL	TOTAL
STORE/CENTRE	Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3		
(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)	98.1	41.3	58.8	198.2		98.1	41.3	58.8	198.2		98.1	41.3	58.8	198.2		98.1	41.3	58.8	198.2	
	49.5	20.3	31.8	101.6		21.2	8.7	13.6	43.5		19.2	8.6	9.3	37.1		8.2	3.7	4.0	15.9	
Port Talbot Town Centre	£15.0	£0.6	£4.0	£19.6		£6.5	£0.3	£1.7	£8.5		£6.8	£0.4	£1.9	9.1		£2.9	£0.3	£0.8	£4.0	£41.2
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.4	£0.0	£0.0	£0.4		£0.2	£0.0	£0.0	£0.2		£0.0	£0.0	£0.1	0.2		£0.2	£0.0	£0.0	£0.2	£0.9
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.9	£0.2	£0.6	1.7		£0.4	£0.1	£0.2	£0.7	£2.3
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.3		£0.0	£0.0	£0.0	£0.0		£0.1	£0.0	£0.0	0.1		£0.1	£0.0	£0.1	£0.1	£0.7
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£14.3	£0.6	£4.0	£18.9		£6.3	£0.3	£1.7	£8.3		£4.0	£0.1	£1.0	5.0		£1.6	£0.1	£0.5	£2.3	£34.4
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£1.8	£0.1	£0.2	2.1		£0.7	£0.1	£0.0	£0.8	£2.9
Commercial Road District Centre																				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£7.2	£0.4	£2.5	£10.1		£2.8	£0.2	£1.3	£4.3		£0.8	£0.0	£0.8	1.6		£0.3	£0.0	£0.3	£0.6	£16.6
Local shops, Talbach local centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	0.0		£0.0	£0.0	£0.0	£0.0	£0.0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.5	£0.5		£0.0	£0.0	£0.2	£0.2		£0.2	£0.0	£0.1	0.3		£0.1	£0.0	£0.0	£0.1	£1.1
Fairway Sandfields, Local Centre																				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.0	0.2		£0.1	£0.0	£0.0	£0.1	£0.3
Pentwyn Baglan Road, Baglan, Local Centre																				
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.8	£0.0	£0.0	0.8		£0.2	£0.0	£0.0	£0.2	£1.0
Cwmavon, Local Centre																				
Co-Op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.4	£0.0	£0.0	£0.4		£0.2	£0.0	£0.0	£0.2		£2.2	£0.0	£0.0	2.2		£1.0	£0.0	£0.0	£1.0	£3.7
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.0	0.2		£0.1	£0.0	£0.0	£0.1	£0.3
Out of Centre																				
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.4	£0.1	£0.4	£2.0		£0.5	£0.2	£0.0	£0.7		£0.8	£0.0	£0.1	0.9		£0.5	£0.0	£0.1	£0.6	£4.1
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£4.0	£0.6	£1.0	£5.6		£2.2	£0.1	£0.5	£2.8		£0.9	£0.3	£0.1	1.4		£0.3	£0.0	£0.1	£0.4	£10.2
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£11.8	£1.2	£3.3	£16.3		£4.9	£0.5	£1.6	£7.0		£2.1	£0.4	£0.4	2.8		£0.9	£0.1	£0.1	£1.1	£27.3
Other	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£1.3	£0.1	£0.0	£1.4		£0.6	£0.0	£0.1	£0.6	£2.1
Zone 1 TOTAL	£39.7	£2.9	£11.7	£54.4		£17.0	£1.2	£5.4	£23.7		£16.3	£1.1	£3.5	£21.0		£7.0	£0.4	£1.3	£8.8	£107.8
Zone 2 (SA11 1 and SA11 2)																				
Neath Town Centre																				
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.4	£0.0	0.4		£0.0	£0.3	£0.0	£0.3	£0.7
Morrisons, Angel Street, Neath, SA11 1RS	£0.6	£4.2	£0.0	£4.8		£0.4	£1.9	£0.0	£2.3		£0.3	£0.8	£0.0	1.1		£0.2	£0.3	£0.0	£0.5	£8.7
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.3		£0.0	£0.2	£0.0	£0.2		£0.2	£0.9	£0.0	1.1		£0.1	£0.5	£0.0	£0.6	£2.2
Briton Ferry Town Centre/Neath Road District Centre																				
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.5	£0.0	0.5		£0.0	£0.2	£0.0	£0.2	£0.7
Out of Centre																				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.5	£1.9	£0.3	£2.8		£0.3	£0.9	£0.1	£1.4		£0.1	£1.1	£0.0	1.2		£0.1	£0.4	£0.0	£0.5	£5.9
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.3	£0.4	£0.0	£0.7		£0.1	£0.0	£0.0	£0.1		£0.2	£0.6	£0.0	0.8		£0.0	£0.3	£0.0	£0.4	£2.0
Zone 2 TOTAL	£1.6	£6.7	£0.3	£8.6		£0.8	£3.0	£0.1	£3.9		£0.9	£4.3	£0.0	£5.2		£0.4	£2.1	£0.0	£2.5	£20.3
Zone 3 (CF33 4, CF33 6 and SA13 2)																				
Pyle District Centre																				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.3	£0.0	£9.4	£9.8		£0.0	£0.0	£4.3	£4.3		£0.0	£0.0	£2.2	2.3		£0.0	£0.0	£0.8	0.9	£17.2
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.3	0.3		£0.0	£0.0	£0.2	0.2	£0.5
Kenfig Hill District Centre																				
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.7	0.7		£0.0	£0.0	£0.3	0.3	£1.0
Margam Local Centre																				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.4	0.4		£0.0	£0.0	£0.3	£0.3	£0.7
Local shops, Margam local centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	0.0		£0.0	£0.0	£0.0	£0.0	£0.0
North Cornelly Local Service Centre																				
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.2	0.2		£0.0	£0.0	£0.1	0.1	£0.2
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	0.3		£0.0	£0.0	£0.1	0.1	£0.5
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.5	0.5		£0.0	£0.0	£0.2	0.2	£0.8
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.3	£0.3		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.6	0.6		£0.0	£0.0	£0.3	0.3	£1.2
Zone 3 TOTAL	£0.3	£0.0	£9.8	£10.1		£0.0	£0.0	£4.4	£4.4		£0.0	£0.0	£5.3	5.4		£0.0	£0.0	£2.3	2.3	£22.2
BEYOND STUDY AREA																				
Aldi, Ind. Est																				

TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2030

	FIRST CHOICE MAIN FOOD SHOPPING					SECOND CHOICE MAIN FOOD SHOPPING					FIRST CHOICE TOP UP FOOD SHOPPING					SECOND CHOICE TOP UP FOOD SHOPPING				TOTAL
				TOTAL					TOTAL					TOTAL					TOTAL	
STORE/CENTRE	Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3			Zone 1	Zone 2	Zone 3		
	(£m)			(£m)		(£m)			(£m)		(£m)			(£m)		(£m)			(£m)	
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)	98.0	41.4	59.1	198.6		98.0	41.4	59.1	198.6		98.0	41.4	59.1	198.6		98.0	41.4	59.1	198.6	
	48.0	20.3	29.0	97.3		20.6	8.7	12.4	41.7		20.6	8.7	12.4	41.7		8.8	3.7	5.3	17.9	
Zone 1 (SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1)																				
Port Talbot Town Centre	£14.5	£0.6	£3.6	£18.8		£6.3	£0.3	£1.6	£8.1		£7.4	£0.4	£2.5	£10.3		£3.2	£0.3	£1.0	£4.5	£41.7
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.3	£0.0	£0.0	£0.3		£0.2	£0.0	£0.0	£0.2		£0.1	£0.0	£0.2	£0.2		£0.2	£0.0	£0.0	£0.2	£0.9
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.9	£0.2	£0.7	£1.9		£0.4	£0.1	£0.3	£0.8	£2.7
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.3		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.0	£0.2		£0.1	£0.0	£0.1	£0.2	£0.7
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£13.9	£0.6	£3.6	£18.1		£6.2	£0.3	£1.5	£8.0		£4.3	£0.1	£1.3	£5.6		£1.8	£0.1	£0.7	£2.6	£34.2
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£2.0	£0.1	£0.3	£2.3		£0.8	£0.1	£0.0	£0.8	£3.2
Commercial Road District Centre																				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£7.0	£0.4	£2.3	£9.7		£2.7	£0.2	£1.2	£4.1		£0.8	£0.0	£1.0	£1.9		£0.4	£0.0	£0.3	£0.7	£16.4
Local shops, Talbach local centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.4	£0.4		£0.0	£0.0	£0.2	£0.2		£0.2	£0.0	£0.2	£0.4		£0.1	£0.0	£0.0	£0.1	£1.1
Fairway Sandfields, Local Centre																				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.0	£0.2		£0.1	£0.0	£0.0	£0.1	£0.3
Pentwyn Baglan Road, Baglan, Local Centre																				
Local shops, Baglan village centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.9	£0.0	£0.0	£0.9		£0.2	£0.0	£0.0	£0.2	£1.1
Cwmavon, Local Centre																				
Co-Op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.3	£0.0	£0.0	£0.3		£0.2	£0.0	£0.0	£0.2		£2.4	£0.0	£0.0	£2.4		£1.1	£0.0	£0.0	£1.1	£3.9
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.0	£0.2		£0.1	£0.0	£0.0	£0.1	£0.3
Out of Centre																				
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.4	£0.1	£0.4	£1.9		£0.5	£0.2	£0.0	£0.7		£0.8	£0.0	£0.2	£1.0		£0.5	£0.0	£0.1	£0.6	£4.2
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£3.9	£0.6	£0.9	£5.4		£2.1	£0.1	£0.5	£2.7		£1.0	£0.3	£0.2	£1.5		£0.4	£0.0	£0.1	£0.4	£10.0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£11.4	£1.2	£3.0	£15.6		£4.8	£0.5	£1.5	£6.7		£2.2	£0.4	£0.5	£3.1		£1.0	£0.1	£0.2	£1.3	£26.7
Other	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£1.4	£0.1	£0.0	£1.5		£0.6	£0.0	£0.1	£0.7	£2.2
Zone 1 TOTAL	£38.6	£2.9	£10.6	£52.1		£16.5	£1.2	£4.9	£22.7		£17.5	£1.2	£4.7	£23.3		£7.6	£0.4	£1.8	£9.7	£107.9
Zone 2 (SA11 1 and SA11 2)																				
Neath Town Centre																				
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.4	£0.0	£0.4		£0.0	£0.3	£0.0	£0.3	£0.7
Morrisons, Angel Street, Neath, SA11 1RS	£0.6	£4.2	£0.0	£4.8		£0.4	£1.9	£0.0	£2.3		£0.3	£0.8	£0.0	£1.1		£0.2	£0.4	£0.0	£0.6	£8.8
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.3		£0.0	£0.2	£0.0	£0.2		£0.2	£0.9	£0.0	£1.1		£0.1	£0.5	£0.0	£0.6	£2.2
Briton Ferry Town Centre/Neath Road District Centre																				
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.5	£0.0	£0.5		£0.0	£0.2	£0.0	£0.2	£0.7
Out of Centre																				
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.5	£1.9	£0.3	£2.7		£0.3	£0.9	£0.1	£1.4		£0.2	£1.1	£0.0	£1.2		£0.1	£0.4	£0.0	£0.5	£5.9
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.3	£0.4	£0.0	£0.7		£0.1	£0.0	£0.0	£0.1		£0.3	£0.6	£0.0	£0.9		£0.0	£0.3	£0.0	£0.4	£2.0
Zone 2 TOTAL	£1.5	£6.7	£0.3	£8.6		£0.8	£3.0	£0.1	£3.9		£1.0	£4.3	£0.0	£5.3		£0.4	£2.1	£0.0	£2.5	£20.3
Zone 3 (CF33 4, CF33 6 and SA13 2)																				
Pyle District Centre																				
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.3	£0.0	£8.6	£8.9		£0.0	£0.0	£3.9	£3.9		£0.1	£0.0	£2.9	£3.0		£0.0	£0.0	£1.1	1.1	£17.0
Local shops, Pyle	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.5	£0.5		£0.0	£0.0	£0.2	0.2	£0.7
Kenfig Hill District Centre																				
Local shops, Kenfig Hill	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.9	£0.9		£0.0	£0.0	£0.4	0.4	£1.3
Margam Local Centre																				
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.6	£0.6		£0.0	£0.0	£0.3	£0.3	£0.9
Local shops, Margam local centre	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.0
North Cornelly Local Service Centre																				
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.2	£0.2		£0.0	£0.0	£0.1	£0.1	£0.3
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.4	£0.4		£0.0	£0.0	£0.2	£0.2	£0.7
Local shops, North Cornelly	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.7	£0.7		£0.0	£0.0	£0.3	£0.3	£1.0
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.3	£0.3		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.8	£0.8		£0.0	£0.0	£0.4	£0.4	£1.5
Zone 3 TOTAL	£0.3	£0.0	£8.9	£9.2		£0.0	£0.0	£4.0	£4.0		£0.1	£0.0	£7.1	£7.1		£0.0	£0.0	£3.0	£3.0	£23.4
BEYOND STUDY AREA																				
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.7	£0.7		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.7
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.3	£0.0	£0.3	£0.5		£0.0	£0.0	£0.1	£0.1		£0.0	£0.0	£0.0	£0.0		£0.1	£0.0	£0.0	£0.1	£0.7
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.8	£1.8	£0.0	£2.6		£0.3	£0.5	£0.0	£0.8		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£3.4
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.6	£0.6		£0.0	£0.0	£0.3	£0.3		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.1	£0.1	£1.1
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.0	£0.0	£0.5	£0.5		£0.0	£0.0	£0.2	£0.2		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.7
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0		£0.0	£0.2	£0.0	£0.2		£0.0	£0.6	£0.0	£0.6		£0.0	£0.2	£0.0	£0.2	£1.0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.9	£0.1	£0.0	£1.0		£0.3	£0.2	£0.0	£0.5		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£1.5
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.0	£0.0	£0.2	£0.2		£0.0	£0.0	£0.1	£0.1		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.3
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.5	£0.0	£0.6		£0.1	£0.1	£0.0	£0.2	£0.8
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0		£0.2	£0.8	£0.0	£1.0		£0.0	£0.2	£0.0	£0.2	£1.2
Tesco Extra, Nantyrffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.0	£1.1	£0.6	£3.7		£0.7	£0.3	£0.2	£1.3		£0.0	£0.0	£0.0	£0.0		£0.1	£0.0	£0.0	£0.1	£5.0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.1	£0.1		£0.0	£0.0	£0.0	£0.0		£0.2	£0.0	£0.2	£0.4		£0.0	£0.0	£0.2	£0.2	£0.7
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.7	£5.4	£0.0	£6.1		£0.2	£2.0	£0.0	£2.2		£0.3	£0.1	£0.0	£0.5		£0.1	£0.1	£0.0	£0.1	£8.9
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£1.5	£1.5		£0.2	£0.0	£0.6	£0.8		£0.0	£0.0	£0.1	£0.1		£0.0	£0.0	£0.1	£0.1	£2.5
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.3	£0.3		£0.0	£0.0	£0.3	£0.3		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	£0.7
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£1.0	£1.3	£2.3		£0.1	£0.4	£0.3	£0.9		£0.0	£0.0	£0.0	£0.0		£0.0	£0.0	£0.0	£0.0	

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM 2

TABLE 6A: EXISTING CONVENIENCE GOODS SHOPPING PATTERNS FOR ZONE 1 (£m) IN 2030

POSTCODE SECTOR	EXPENDITURE FLOW (%)	2030 (£m)
Zone 1 (retention)	81.7%	80.1
Zone 2	3.8%	3.7
Zone 3	0.4%	0.4
Beyond Study Area	14.0%	13.8
TOTAL	100%	£98.05
Note: Shopping patterns taken from Table 3. Numbers may not add due to rounding.		

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

TABLE 6B: FOODSTORE BENCHMARK TURNOVER ANALYSIS 2025 + 2030

DESTINATION	Gross Floorspace (Sq.m)	Net Floorspace (Sq.m)	Net Convenience Floorspace (Sq.m)	Benchmark Sales Density 2025 (£ per sqm)	Benchmark Sales Density 2030 (£ per sq.m)	Benchmark Turnover 2025 (£m)	Benchmark Turnover 2030 (£m)
Port Talbot Town Centre			2,642			£29.50	£29.50
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	1,460	1,022	204	£4,357	£4,357	£0.89	£0.89
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	1,060	848	424	£4,525	£4,525	£1.92	£1.92
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA		2,400	1,764	£14,421	£14,421	£25.44	£25.44
Local shops, Port Talbot Town Centre			250	£5,000	£5,000	£1.25	£1.25
Commercial Road District Centre			1,416			£9.30	£9.30
Aldi, Commercial Road, Port Talbot, SA13 1LG		857	686	£10,441	£10,441	£7.16	£7.16
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG			645	£3,000	£3,000	£1.94	£1.94
Local shops, Taibach			85	£2,446	£2,446	£0.21	£0.21
Fairway Sandfields Local Centre							
Costcutter, Fairway, Port Talbot, SA12 7HR			390	£5,084	£5,084	£1.98	£1.98
Pentwyn Bagan Road, Baglan, Local Centre							
Local shops, Baglan village centre			25	£3,000	£3,000	£0.08	£0.08
Cwmavon, Local Centre						£3.49	£3.51
Co-Op Food, Heol Jiwbill, Cwmavon, Port Talbot, SA12 9NR	415	332	300	£10,718	£10,718	£3.21	£3.21
Local shops, Cwmafan village centre			-			£0.28	£0.30
Out of Centre							
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ		1,051	940	£6,382	£6,382	£6.00	£6.00
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ		1,261	1,030	£7,631	£7,631	£7.86	£7.86
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ		3,325	2,510	£9,701	£9,701	£24.35	£24.35
Other			933			£2.06	£2.06
TOTAL				-	-	£84.62	£84.64
Notes: a. Net retail sales floorspace figure for Aldi, Commercial Rd supplied by Aldi Stores Ltd (Dec 2024) b. Net retail floorspace figure for others taken from Neath Port Talbot Retail Study (July 2013) by GVA and Retail Assessment by DPP for planning permission P2017/0516. c. Proportion of net floorspace derived from typical company split between convenience and comparison floorspace as identified by Global Data March 2025. d. Sales densities for major retailers derived from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers (March 2025) and Mintel Retail Rankings e. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b of Experian Retail Planner Briefing Note 22 (March 2025) f. Survey derived turnover for 2030 sourced from Table 5 2022 prices							

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM 2

TABLE 6C: RETAIL CAPACITY ANALYSIS - ZONE 1

	2025	2030
Total available convenience goods expenditure within Zone 1 (£m)	£98.08	£98.02
Turnover derived from Zone 1 residents (£m)	£80.1	£80.1
Market Share (%)	81.6%	81.8%
Expenditure inflow (£m)	£27.7	£27.8
Expenditure from outwith Study Area (£m)	£5.9	£5.9
Total Turnover (£m)	£113.6	£113.8
Benchmark Turnover (£m)	£84.6	£84.6
Residual Expenditure / Capacity (£m)	£29.0	£29.1
Notes: a. Total convenience goods expenditure taken from Table 2(d) b. Turnover derived from Z1 residents and Expenditure inflow taken from Tables 4 and 5. c. Expenditure inflow from outwith Study Area estimated at a conservative 6% of existing turnover, as informed by the Neath Port Talbot Retail Study (2013). That study used 5% however that figure considered beyond the Council area only, whereas our Study Area was smaller and did not capture some results from the wider Council area. Table 4 of that report found that Port Talbot drew some trade from Zones 4-8, which we did not survey. We expect this inflow figure to be higher based on other more recent evidence including the Bridgend Retail Study Update (May 2022). d. Benchmark Turnovers from Table 6B.		

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT ADDENDUM 2

TABLE 7: ANTICIPATED CONVENIENCE TRADE DRAW TO ALDI DEVELOPMENT

ZONE	TRADE DRAW (%)	2030 (£M)
Zone 1	80%	2.0
Zone 2	5%	0.1
Zone 3	15%	0.4
Beyond Study Area	0%	0.0
TOTAL	100%	£2.48
Note: Trade draw informed by shopping patterns for primary catchment.		

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

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider study area 2030	Total Convenience Turnover (from HH survey) 2030	Estimated Turnover Post-Iceland Closure 2030	Estimated Turnover Post-M+S, Neath Closure 2030	Zone 1		Zone 2		Zone 3	
	Total (£m)	Total (£m)	Total (£m)	Total (£m)	Total (£m)	(£m)	(%)	(£m)	(%)	(£m)	(%)
Zone 1											
Port Talbot Town Centre											
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.72	£0.19	£0.91	£1.18	£1.18	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB (now closed)	£1.33	£1.34	£2.66	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.55	£0.12	£0.67	£1.07	£1.07	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£26.04	£8.20	£34.25	£35.05	£35.05	£0.74	37.50%	£0.04	30.00%	£0.12	31.00%
Local shops, Port Talbot Town Centre	£2.74	£0.45	£3.18	£3.18	£3.18	£0.02	1.00%	£0.00	0.00%	£0.00	0.00%
Commercial Road District Centre											
Aldi, Commercial Road, Port Talbot, SA13 1LG (TO CLOSE)	£10.88	£5.52	£16.40	£16.40	£16.40	-	-	-	-	-	-
Local shops, Taibach local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.27	£0.84	£1.11	£1.11	£1.11	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Fairway Sandfields, Local Centre											
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.30	£0.00	£0.30	£0.30	£0.30	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Pentwyn Baglan Road, Baglan, Local Centre											
Local shops, Baglan village centre	£1.07	£0.00	£1.07	£1.07	£1.07	£0.01	0.50%	£0.00	0.00%	£0.00	0.00%
Cwmavon, Local Centre											
Co-Op Food, Heol Jiwbili, Cwmavon, SA12 9NR	£3.93	£0.00	£3.93	£3.93	£3.93	£0.05	2.50%	£0.00	0.00%	£0.00	0.00%
Local shops, Cwmafan village centre	£0.30	£0.00	£0.30	£0.30	£0.30	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	£0.10	£0.00	£0.10	£0.10	£0.10	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£3.19	£0.96	£4.16	£5.36	£5.36	£0.08	4.00%	£0.00	4.00%	£0.02	5.00%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£7.39	£2.61	£10.00	£10.00	£10.00	£0.50	25.00%	£0.02	20.00%	£0.06	15.00%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£19.39	£7.34	£26.73	£26.73	£26.73	£0.40	20.00%	£0.02	15.00%	£0.07	20.00%
Other	£2.03	£0.20	£2.24	£2.24	£2.24	£0.03	1.50%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 1	£80.14	£27.77	£107.91	£107.91	£107.91	£1.83	92.0%	£0.09	69.0%	£0.26	71.0%
Zone 2											
Neath Town Centre											
Local shops, Neath Town Centre	£0.00	£0.67	£0.67	£0.67	£1.34	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Morrisons, Angel Street, Neath, SA11 1RS	£1.47	£7.28	£8.76	£8.76	£9.65	£0.02	1.00%	£0.01	11.00%	£0.00	0.00%
M&S Green Street East Street 16, Neath SA11 1DH (now closed)	£0.51	£1.73	£2.24	£2.24	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Briton Ferry Town Centre/Neath Road District Centre											
Local shops, Briton Ferry Town Centre	£0.00	£0.73	£0.73	£0.73	£0.73	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
Lidl, Briton Ferry Road, Neath, SA11 1AS	£1.06	£4.84	£5.90	£5.90	£5.90	£0.02	1.00%	£0.01	10.00%	£0.02	5.00%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.66	£1.36	£2.02	£2.02	£2.02	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 2	£3.70	£16.62	£20.32	£20.32	£19.64	£0.04	2.00%	£0.03	21.00%	£0.02	5.00%
Zone 3											
Pyle District Centre											
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.44	£16.55	£16.98	£16.98	£16.98	£0.02	1.00%	£0.00	0.00%	£0.02	6.00%
Local shops, Pyle	£0.00	£0.66	£0.66	£0.66	£0.66	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Kenfig Hill District Centre											
Local shops, Kenfig Hill	£0.00	£1.32	£1.32	£1.32	£1.32	£0.00	0.00%	£0.00	0.00%	£0.00	1.00%
Margam Local Centre											
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.94	£0.94	£0.94	£0.94	£0.00	0.00%	£0.00	0.00%	£0.00	1.00%
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
North Cornelly Local Service Centre											
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.32	£0.32	£0.32	£0.32	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.66	£0.66	£0.66	£0.66	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, North Cornelly	£0.00	£1.03	£1.03	£1.03	£1.03	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.51	£1.51	£1.51	£1.51	£0.00	0.00%	£0.00	0.00%	£0.00	1.00%
SUB-TOTAL Zone 3	£0.44	£23.00	£23.43	£23.43	£23.43	£0.02	1.00%	£0.00	0.00%	£0.03	9.00%
BEYOND STUDY AREA											
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.70	£0.70	£0.70	£0.70	£0.00	0.00%	£0.00	0.00%	£0.01	2.00%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.34	£0.38	£0.73	£0.73	£0.73	£0.02	1.00%	£0.00	0.00%	£0.01	3.00%
Aldi, Neath Abbey Rd, Neath SA10 7BR	£1.12	£2.26	£3.38	£3.38	£3.38	£0.02	1.00%	£0.01	5.00%	£0.00	0.00%
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£1.07	£1.07	£1.07	£1.07	£0.00	0.00%	£0.00	0.00%	£0.00	1.00%
Farmfoods, Pentre Felin Retail Park, Tondur, Bridgend, CF32 9GP	£0.00	£0.71	£0.71	£0.71	£0.71	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£1.02	£1.02	£1.02	£1.02	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£1.17	£0.38	£1.55	£1.55	£1.55	£0.02	1.00%	£0.00	2.00%	£0.00	0.00%
Lidl, Maesteg Rd, Tondur, Off CF32 9DF	£0.00	£0.33	£0.33	£0.33	£0.33	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.23	£0.58	£0.81	£0.81	£0.81	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.21	£1.04	£1.25	£1.25	£1.25	£0.00	0.00%	£0.00	1.00%	£0.00	0.00%
Tesco Extra, Nantyllin North, Swansea Enterprise Park, Swansea, SA7 9RF	£2.78	£2.26	£5.05	£5.05	£5.05	£0.00	0.00%	£0.00	1.00%	£0.01	2.50%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.16	£0.50	£0.66	£0.66	£0.66	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£1.27	£7.61	£8.89	£8.89	£8.89	£0.04	2.00%	£0.00	1.00%	£0.00	0.00%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.16	£2.38	£2.53	£2.53	£2.53	£0.00	0.00%	£0.00	0.00%	£0.01	1.50%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.64	£0.68	£0.68	£0.68	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.14	£3.06	£3.20	£3.20	£3.20	£0.00	0.00%	£0.00	0.00%	£0.01	2.00%
Lidl, Bridgend Retail Park, Ulys Tre Dwr, Bridgend CF31 3LG	£0.00	£1.16	£1.16	£1.16	£1.16	£0.00	0.00%	£0.00	0.00%	£0.01	2.00%
Local shops, Bridgend Town Centre	£0.00	£0.24	£0.24	£0.24	£0.24	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Maesteg Town Centre	£0.27	£0.07	£0.34	£0.34	£0.34	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Swansea City Centre	£0.37	£0.41	£0.78	£0.78	£0.78	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.44	£0.58	£1.02	£1.02	£1.02	£0.00	0.00%	£0.00	0.00%	£0.00	1.00%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.75	£0.48	£1.23	£1.23	£1.23	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.23	£1.23	£1.23	£1.23	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.07	£0.07	£0.07	£0.07	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.13	£0.13	£0.13	£0.13	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.49	£0.49	£0.49	£0.49	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.05	£0.05	£0.05	£0.05	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Porthcawl	£0.00	£0.95	£0.95	£0.95	£0.95	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.39	£0.00	£0.39	£0.39	£1.06	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.59	£0.00	£0.59	£0.59	£0.59	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.87	£1.73	£3.60	£3.60	£3.60	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.48	£0.05	£0.53	£0.53	£0.53	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.27	£0.45	£0.73	£0.73	£0.73	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Other	£0.70	£0.23	£0.94	£0.94	£0.94	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Beyond Study Area	£13.77	£33.12	£46.89	£46.89	£47.56	£0.10	5.0%	£0.01	10.0%	£0.06	15.0%
OVERALL TOTAL	£98.05	£100.50	£198.55	£198.55	£198.55	£1.98	100.0%	£0.12	100.0%	£0.37	100.0%
Notes:											
a. Trade allocation of the proposal based on the primary catchment area, existing shopping patterns as informed by the Tables 3-5 and geographic location of retail provision.											
b. Turnover of Aldi store from Table 1B Aldi turnover Uplift.											
c. Assumptions made for closure of Iceland Port Talbot that 55% of trade would remain in town centre, given nature of retail offer and likelihood customers walked to the store. This has been redistributed and split 30% to Tesco, 15% to Home Bargains, 10% to B+M Bargains, and 45% of trade to Iceland Food Warehouse at Baglan.											
d. Assumptions made for closure of M+S in Neath. 40% of the trade reallocated to Morrisons store, 30% to local shops in the town centre and 30% to the nearest M+S Food in Swansea.											
2022 Prices											

TABLE 9: CONVENIENCE GOODS CUMULATIVE + SOLUS TRADING IMPACT 2030 (£m)

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider Study Area 2030	Total Convenience Turnover (from Study Area) 2030	Estimated Turnover Post-Iceland Closure 2030	Estimated Turnover Post-M+S, Neath Closure 2030	Estimated Turnover Post-Aldi, Taibach Closure 2030	SOLUS IMPACT						CUMULATIVE IMPACT		
							Proposed Aldi store, Afan Way			Home Bargains store, Taibach DC (New)			Cumulative Trading Impact		Post-Cumulative Impact Total Turnover (from Study Area) 2030 (£m)
							(% Diversion)	(£m Diversion)	(% Trading Impact)	(% Diversion)	(£m Diversion)	(% Trading Impact)	(£m Diversion)	(% Trading Impact)	
Zone 1															
Port Talbot Town Centre															
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.72	£0.19	£0.91	£1.18	£1.18	£1.18	0.0%	£0.00	0.0%	25.00%	£0.48	41.11%	£0.48	41.11%	£0.69
Iceland, Aberafan Centre, Port Talbot, SA13 1PB (now closed)	£1.33	£1.34	£2.66	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	0.0%	£0.00	0.00%	£0.00	0.00%	£0.00
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.55	£0.12	£0.67	£1.07	£1.07	£1.07	0.0%	£0.00	0.0%	40.0%	£0.78	72.28%	£0.78	72.28%	£0.30
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£26.04	£8.20	£34.25	£35.05	£35.05	£35.05	36.2%	£0.90	2.6%	5.00%	£0.10	0.28%	£0.99	2.84%	£34.05
Local shops, Port Talbot Town Centre	£2.74	£0.45	£3.18	£3.18	£3.18	£3.18	0.8%	£0.02	0.6%	0.00%	£0.00	0.00%	£0.02	0.62%	£3.16
TOTAL	£31.38	£10.30	£41.68	£40.48	£40.48	£40.48	37.0%	£0.9	2.3%	70.0%	£1.4	3.4%	£2.3	5.6%	£38.21
Commercial Road District Centre															
Aldi, Commercial Road, Port Talbot, SA13 1LG (TO CLOSE)	£10.88	£5.52	£16.40	£16.40	£16.40	-	-	-	-	-	-	-	-	-	-
Local shops, Taibach local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.27	£0.84	£1.11	£1.11	£1.11	£1.11	0.0%	£0.00	0.0%	2.00%	£0.04	3.49%	£0.04	3.49%	£1.07
Home Bargains, Commercial Road, Port Talbot (New)	-	-	-	-	-	£2.35	0.0%	£0.00	0.0%	-	-	-	£0.00	0.00%	£2.35
TOTAL	£11.15	£6.36	£17.51	£17.51	£17.51	£3.46	0.0%	£0.0	0.0%	2.0%	-	-	-	-	£3.46
Fairway Sandfields, Local Centre															
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.30	£0.00	£0.30	£0.30	£0.30	£0.30	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.30
Pentwyn Baglan Road, Baglan, Local Centre															
Local shops, Baglan village centre	£1.07	£0.00	£1.07	£1.07	£1.07	£1.07	0.4%	£0.01	0.9%	0.00%	£0.00	0.00%	£0.01	0.93%	£1.06
Cwmavon, Local Centre															
Co-op Food, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£3.93	£0.00	£3.93	£3.93	£3.93	£3.93	2.0%	£0.05	1.3%	0.00%	£0.00	0.00%	£0.05	1.26%	£3.88
Local shops, Cwmafan village centre	£0.30	£0.00	£0.30	£0.30	£0.30	£0.30	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.30
TOTAL	£4.23	£0.00	£4.23	£4.23	£4.23	£4.23	2.0%	£0.05	1.2%	0.0%	£0.0	0.0%	£0.05	1.2%	£4.18
Out of Centre															
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£3.19	£0.96	£4.16	£5.36	£5.36	£5.36	4.2%	£0.10	1.9%	3.00%	£0.06	1.09%	£0.16	3.01%	£5.19
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£7.39	£2.61	£10.00	£10.00	£10.00	£10.00	23.3%	£0.58	5.8%	10.00%	£0.19	1.94%	£0.77	7.71%	£9.23
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£19.39	£7.34	£26.73	£26.73	£26.73	£26.73	19.8%	£0.49	1.8%	12.00%	£0.23	0.87%	£0.72	2.70%	£26.01
Other	£2.03	£0.20	£2.24	£2.24	£2.24	£2.24	1.2%	£0.03	1.3%	0.00%	£0.00	0.00%	£0.03	1.33%	£2.21
Proposed Aldi store, Afan Way	-	-	-	-	-	£18.88	-	-	-	3.00%	£0.06	0.31%	£0.06	0.31%	£18.82
SUB-TOTAL ZONE 1	£80.1	£27.8	£107.9	£107.9	£107.9	£93.8	87.7%	£2.18	-	100.0%	£1.94	-	£4.11	-	£89.7
Zone 2															
Neath Town Centre															
Local shops, Neath Town Centre	£0.00	£0.67	£0.67	£0.67	£1.34	£1.34	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£1.34
Morrisons, Angel Street, Neath, SA11 1RS	£1.47	£7.28	£8.76	£8.76	£9.65	£9.65	1.4%	£0.03	0.3%	0.00%	£0.00	0.00%	£0.03	0.35%	£9.62
M&S Green Street East Street 16, Neath SA11 1DH (now closed)	£0.51	£1.73	£2.24	£2.24	£0.00	£0.00	-	-	-	-	-	-	-	-	-
TOTAL	£1.98	£9.68	£11.66	£11.66	£10.99	£10.99	1.4%	£0.03	0.3%	0.0%	£0.00	0.0%	£0.03	0.3%	£9.62
Briton Ferry Town Centre/Neath Road District Centre															
Local shops, Briton Ferry Town Centre	£0.00	£0.73	£0.73	£0.73	£0.73	£0.73	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.73
Out of Centre															
Lidl, Briton Ferry Road, Neath, SA11 1AS	£1.06	£4.84	£5.90	£5.90	£5.90	£5.90	2.1%	£0.05	0.9%	0.00%	£0.00	0.00%	£0.05	0.86%	£5.85
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.66	£1.36	£2.02	£2.02	£2.02	£2.02	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£2.02
SUB-TOTAL ZONE 2	£3.70	£16.62	£20.32	£20.32	£19.64	£19.64	3.4%	£0.08	-	0.0%	£0.00	-	£0.08	-	
Zone 3															
Pyle District Centre															
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.44	£16.55	£16.98	£16.98	£16.98	£16.98	1.7%	£0.04	0.2%	0.00%	£0.00	0.00%	£0.04	0.25%	£16.94
Local shops, Pyle	£0.00	£0.66	£0.66	£0.66	£0.66	£0.66	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.66
TOTAL	£0.44	17.21	£17.65	£17.65	£17.65	£17.65	1.7%	£0.04	0.2%	0.0%	£0.00	0.0%	£0.04	0.2%	£17.61
Kenfig Hill District Centre															
Local shops, Kenfig Hill	£0.00	£1.32	£1.32	£1.32	£1.32	£1.32	0.2%	£0.00	0.00%	0.00%	£0.00	0.00%	£0.00	0.28%	£1.31
Margam Local Centre															
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.94	£0.94	£0.94	£0.94	£0.94	0.0%	£0.00	0.4%	0.00%	£0.00	0.00%	£0.00	0.40%	£0.93
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00
TOTAL	£0.00	£0.94	£0.94	£0.94	£0.94	£0.94	0.0%	£0.00	0.4%	0.0%	£0.00	0.0%	£0.00	0.4%	£0.93
North Cornelly Local Service Centre															
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.32	£0.32	£0.32	£0.32	£0.32	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.32
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.66	£0.66	£0.66	£0.66	£0.66	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£0.66
Local shops, North Cornelly	£0.00	£1.03	£1.03	£1.03	£1.03	£1.03	0.0%	£0.00	0.0%	0.00%	£0.00	0.00%	£0.00	0.00%	£1.03
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.51	£1.51	£1.51	£1.51	£1.51	0.2%	£0.00	0.2%	0.00%	£0.00	0.00%	£0.00	0.25%	£1.51
TOTAL	£0.00	£3.53	£3.53	£3.53	£3.53	£3.53	0.2%	£0.00	0.1%	0.0%	£0.00	0.0%	£0.00	0.1%	£3.53
SUB-TOTAL ZONE 3	£0.44	£23.00	£23.43	£23.43	£23.43	£23.43	2.0%	£0.05	-	0.0%	£0.00	-	£0.05	-	
BEYOND STUDY AREA															
SUB-TOTAL BEYOND STUDY AREA															
	£13.77	£33.12	£46.89	£46.89	£47.56	£47.56	6.8%	£0.17	-	0.0%	£0.00	-	£0.17	-	
TOTAL	£98.05	£100.50	£198.55	£198.55	£198.55	£198.55	100%	£2.48	-	100%	£1.94	-	£4.42	-	
Notes:															
a. Survey derived turnovers of all existing destinations for 2030 sourced directly from TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2030 Column Y.															
b. Turnover of proposed Aldi foodstore taken from Table 1 and allows for changes in turnover efficiencies based on Figures 4a and 4b of Experian Retail Planner Briefing Note 22 (March 2025).															
c. Impact based on the proportional change in turnover expressed as a percentage.															
d. Percentage impact tested upon the total turnovers of centres and other retail destinations (i.e. inclusive of inflow from the wider Retail Study area).															
e. Anticipated trade diversion of proposal based on existing shopping patterns and geographic location of existing and proposed provision (as identified by the household telephone shopper survey data)															
f. 'Post-Impact Total Turnover (2030)' = 'Pre-Impact Total Turnover (2030)' minus '£m Diversion (2030)'															
2022 Prices															

Appendix 2

Letter from TJ Morris regarding
Aldi Taibach store

Date: 6th March 2025
Our Ref: James Clarke – Port Talbot Commercial Rd (913)
Your Ref:

T J Morris Limited
Portal Way
Liverpool, UK
L11 0JA
T: +44(0)151 530 2920
W: homebargains.co.uk

Rob Jones
Real Estate Director
ALDI Stores Ltd
National Real Estate GB/IE
Wentloog Avenue
Cardiff
CF3 2GJ

Dear Mr Jones

PORT TALBOT - 32/38 Commercial Road SA13 1LG

Please take this as confirmation that T J Morris Limited, who trade nationally as Home Bargains, exchanged contracts on 4 March 2025 for the unconditional purchase of the Aldi store at 32-38 Commercial Rd, Port Talbot SA13 1LG, with a fixed completion date of 14th March 2025. It is our intention to take occupation as soon as vacant possession can be secured from the tenant, Aldi Stores Ltd and we are happy to enter into negotiations with your company in respect to negotiations to meet with your operational requirements.

It is anticipated that the new store will employ 50 people.

Please contact me on the below.

Kind regards.

Yours sincerely



James Clarke
Group Legal Counsel
T.J. Morris Limited

Email: james.clarke@tjmorris.co.uk
Tel: 01515302220

Appendix 3

Retail Impact Assessment Methodology – Update

Appendix 3: Retail Impact Assessment Methodology

Methodology / Data Input	Approach / Data Source
<i>Population and Expenditure</i>	
Price Base	2022 prices.
Population and Expenditure Base Data Source	Base population and per capita expenditure derived from Experian Location Analyst data (March 2025 Report).
Population Growth Assumptions	Population projected forwards in line with Experian Location Analyst data report (report dated March 2025).
Convenience and Comparison Goods Expenditure Growth Assumptions	Experian forecast convenience and comparison goods growth rates, taken from Appendix 4b of Experian Retail Planner Briefing Note 22 (March 2025).
Non-Store Retail Trade / Special Forms of Trading	Year-on-year NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 22 (March 2025).
<i>Study Area and Shopping Patterns</i>	
Impact Assessment Area of Study and Household Shopper Survey Base Data	NEMS were instructed to complete a household shopping survey covering ten postcode sectors, with these based around the Council Retail Study from 2013. Zone 1 comprises SA12 6, SA12 7, SA12 8, SA12 9 and SA13 1. In order to understand inflow into the primary catchment, surveys were extended to cover adjacent postcode sectors SA11 1 and SA11 2 (known as Zone 2) reflecting the southern part of Neath and sectors SA13 2, CF33 4, CF33 6 (Zone3) relating to Margam, North Cornelly and Pyle. These areas allow us to understand the trading influence of major foodstores and centres which surround Port Talbot. This decision was informed by the conclusions at paragraph 5.12 of the Neath Port Talbot Retail Study (NPTRS), where it had confirmed that <i>"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."</i> These areas have therefore been the focus of the assessment.

<i>Floorspace, Sales Densities, and Turnover</i>	
Planning Application Scheme Floorspace	Gross floorspace of proposed Aldi foodstore sourced from architectural drawings. Net sales area and convenience goods / comparison goods floorspace split of Aldi provided by the retailer.
Benchmark Convenience Goods Sales Densities for Scheme	Convenience and comparison goods sales densities for Aldi derived Global Data, March 2025.
Changes in Retail Sales Densities	Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b of Experian Retail Planner Briefing Note 22 (March 2025).
Committed Retail Floorspace	There are none that have been identified but assumptions made regarding Home Bargains future occupation of Aldi store and this has been modelled. Floorspace adopted matches Aldi's existing store at Taibach, with Home Bargains 50%/50% food/non-food split.
<i>Retail Impact Assumptions</i>	
Impact Assessment Base Year	2025 (reflecting the fact that this will be the year in which the planning application is determined)
Impact Assessment Test Years	2030 (five years from the date of the planning application)
Inflow Expenditure Allowance (Existing Facilities and Centres)	The findings of the NPTRS were that "<i>Port Talbot has a much smaller market share in Zones 1, 4, 6, 7 and 8.</i>" From that older survey, Table 5 at Appendix C, showed that £5.1m entered Zone 1 from those areas. Bearing in mind that was for 2012 and in 2010 prices, it is clear that this would have increased to some degree by the base and test years. In addition, for additional inflow, Table 4 of Appendix A of the Bridgend Retail Study Update 2021 was used. This identified nearly £19m of expenditure from the wider Bridgend catchment was spent in Port Talbot. (https://www.bridgend.gov.uk/media/14833/30-retail-study-update-2022.pdf)
Approach to Trade Diversion	Anticipated trade diversion of the proposal based on existing shopping patterns and geographic location of existing and proposed provision (as identified by the household survey findings).
Definition of Impact	Impact based on proportional change in turnover expressed as a percentage.

Contact details

Enquiries

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

Visit us online

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

Avison Young

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

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