
260, 270 & 280 Bartley Wood Business Park

Retail Assessment

Prepared by Barton Willmore LLP on behalf of XLB Property Ltd

June 2021

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1.0 INTRODUCTION

1.1 This Retail Assessment has been prepared by Barton Willmore LLP on behalf of XLB Property Ltd (XLB) ("the Applicant") in support of a planning application for a proposed employment-led development on land at 260, 270 and 280 Bartley Wood Business Park, Hook ("the Site").

1.2 The Description of Development is as follows:

'Demolition of existing buildings and redevelopment of the site to provide industrial units (Flexible Use Class B1/B8/E(g)(i)-(iii)) and 1No. foodstore (Use Class E(a)), together with associated parking, a new vehicular access off Griffin Way South, landscaping and other associated works'.

1.3 The underlying priority for the application is to renew a largely vacant site, to maximise employment, and to provide a greater range of employment types in this location. A retail component (comprising a foodstore) is proposed alongside new employment uses which is intended to serve a complementary function and provide an important on-site amenity for the wider employment area. It also offers the potential to enhance the local convenience goods offer within the Hook area, improving choice and competition and reduce the leakage of trade to other destinations located further afield.

1.4 The Site is located out-of-centre for the purposes of retail planning policy. As such, this Assessment provides justification for the retail component of the scheme against the terms of the Development Plan and the National Planning Policy Framework (NPPF). Whilst not relied upon in this Assessment, it is relevant to note that under the amended Use Classes Order, there is the potential for the existing buildings to accommodate retail uses including a foodstore without the need for planning permission (excluding any external alterations).

1.5 The scope of this assessment and its methodology has been discussed with the Council in advance of submission, as encouraged by the Planning Practice Guidance (PPG).

1.6 Against this background, the assessment covers the following:

- **Section 2** – a description of the application site and proposed development;

- **Section 3** – analysis of the retail planning policy context;
- **Section 4** – an overview of the Application Site’s retail context including existing centres and destinations;
- **Section 5** – an assessment of the proposed floorspace against the NPPF sequential test; and
- **Section 6** – an assessment of the proposed floorspace against the NPPF impact tests; and
- **Section 7** – outlines the summary and conclusions arising from the above including the scheme’s compliance with the retail policies set out within the NPPF and relevant adopted Development Plan policy.

1.7 Full details of the scheme and justification against other policy matters is provided in the Planning Statement and the suite of technical documents submitted as part of the planning application.

2.0 APPLICATION SITE AND PROPOSED DEVELOPMENT

The Application Site and Surroundings

- 2.1 The boundary of the Application Site is identified in red on the Site Location Plan provided in **Appendix 1**. The Site extends to approximately 3.9ha and sits within the eastern portion of Bartley Wood Business Park, Hook.
- 2.2 Bartley Wood Business Park itself is situated to the south of Hook town centre, in the heart of the Blackwater Valley. The Business Park is well located in proximity to the strategic road network and local railway links. Junction 5 of the M3 is located approximately 1km to the south-west of the Site via Griffin Way South (B3349); and Hook Station is located approximately 1km to the north-west.
- 2.3 The Site is located directly to the east of Griffin Way South and south of Bartley Way. The Site currently accommodates three 3-storey plus basement office buildings (Use Class E) totalling approximately 19,800 sqm (GIA) of floorspace with associated car parking (1,001 spaces) at basement and surface level. The Site also comprises localised landscaping within the car park and surrounding the office buildings and a tree lined boundary to the east and south. All office buildings are currently vacant and have been for some time.
- 2.4 Vehicular and pedestrian access to the Site is currently taken off Bartley Way to the north, which in turn connects to Griffin Way South to the west.
- 2.5 The surrounding context largely comprises employment uses within the wider Bartley Wood Business Park to the north and west (although residential uses have been introduced as part of the office to residential conversion of Providence House). The Bartley Heath Nature Reserve lies to the south and east, along with open farmland and Holt Farm and a handful of residential properties to the north-east.

Proposed Development

- 2.6 The Proposed Development represents a significant opportunity to bring forward employment generating uses on an employment site. Whilst the proposed foodstore is not in itself a traditional employment use in land use terms, it is expected to generate 40 jobs and these are most likely to be locally generated, as is generally the case within the retail sector.

- 2.7 The proposed foodstore will also introduce a key amenity for both the new and existing employment community within the wider Business Park, which is currently lacking in the immediate area. This is reinforced by the commercial agency advice received from Hollis Hockley and submitted in support of the application. The Market Review states that:

'Increasingly, occupiers demand a better offering than Bartley Wood Business Park has to offer when it comes to amenity as there is an increasing focus on employee wellbeing' (Section 7, 2nd bullet)

- 2.8 In addition to the direct impacts on job creation and providing a complementary amenity to serve the wider Business Park, the proposed foodstore will also provide improved choice and competition within the convenience goods sector, to the benefit of Hook residents and those in the surrounding area. As set out in more detail in Sections 3 and 4, there is evidence of a qualitative need for additional foodstore provision in the Hook area which will contribute towards alleviating overtrading in existing stores (namely the Tesco on Station Road) and help to claw back expenditure which is currently being spent in foodstores further afield (i.e. in Basingstoke, Fleet and Blackwater). This in turn will support more sustainable shopping patterns.
- 2.9 The Application is made in full for the development of 14,175 sqm gross of floorspace, including 1,963 sqm gross (1,315 sqm net sales area) Class E(a) foodstore. The Proposed Site Plan is included in **Appendix 2**. The proposed foodstore is intended to be occupied by Aldi and has been designed having regard to Aldi's specific requirements.

Aldi

- 2.10 Aldi is one of the fastest growing supermarket operators in the UK market. Having originated in Germany, Aldi first entered the UK market in 1990 and has now expanded to over 700 stores across England, Scotland and Wales. In 2018, Aldi became the fifth largest supermarket in the UK, ahead of Co-op.
- 2.11 Aldi regularly receives industry awards recognising the quality of its products and customer experience. For example, Aldi was voted the nation's Favourite Supermarket, Favourite Premium Supermarket Range and Favourite Wine Retailer at the 2020 Good Housekeeping Food Awards; named Chilled Retailer of the Year for

the fourth year in a row at the 2020 Retail Industry Awards; and Christmas Retailer of the Year at the 2020 Quality Food Awards. It was also named Best Value Supermarket in the 2019 Moneywise Home Finances Awards.

2.12 The premise of Aldi's business model is to offer customers a carefully selected range of high-quality, exclusive own label groceries at heavily discounted prices. Aldi's distinctive approach to food retailing is based on achieving simplicity and maximum efficiency at every stage of the business, from supplier to customer. This enables Aldi to sell high quality products, from a limited core range (compared to other supermarkets) of mainly exclusive own labels, at the lowest possible price consistently across the entire range. Aldi uses three key formats on its products; its 'Core Range', 'Specially Selected' and 'Everyday Essentials', which are easily understood by consumers.

2.13 Aldi is a 'deep discount' retailer, and the main aims of its trading philosophy include:

- Maximum operational efficiency and cost control;
- Standard merchandising through all stores;
- Bulk displays in original shipping pallets;
- Unique delivery system;
- Carefully selected and limited core range of c.1,800 products;
- Own label high quality products;
- Formidable buying power;
- High volume and turnover per product;
- Heavily discounted prices providing an average 20-30% saving across the entire range, compared with similar quality products from other stores.

2.14 In order to accommodate bulk food displays and provide the operational efficiency required, all stores have a limited footprint and are of modest size, designed to and aimed at serving local communities. The limited product line of c.1,800 products also means that, unlike a large supermarket format (which may sell up to 40,000 product lines), shoppers will often visit other local operators to complete their weekly shop. This means that shoppers typically supplement their shop at Aldi with additional trips to other shops in nearby centres and supermarkets.

2.15 As a further differentiation to other supermarket operators, Aldi do not sell cigarettes and tobacco products, stationary products and pharmaceutical products,

nor do their stores include in-store counters such as a butcher, fishmonger, bakery, delicatessen or a hot food counter. There is also no offer of in store cafes / restaurants or franchises such as photo processing, dry cleaning, opticians or pharmacy.

- 2.16 Whilst the core range of products is limited, Aldi offers significant choice of locally sourced produce. Where possible fresh meat and produce is UK sourced. Fresh fruit and vegetables are also sourced in the UK when in season and Aldi leads the way in supporting British farmers. In addition, Aldi works with a range of local businesses and suppliers in order to supply fresh bread, milk and other dairy products.
- 2.17 Aldi's stores dedicate approximately 20% of their floorspace to comparison goods. These goods are sold as 'special purchases' on a 'when it's gone, it's gone' basis. This approach is highly seasonal and there is therefore a continued variation in the type of goods that may be on offer. This compares to larger format supermarkets which typically dedicate c.30-40% of their total floor area to comparison goods, the majority of which is occupied by permanent product ranges.
- 2.18 It is evident from the above that there are a number of key distinctions between Aldi's business model and overall philosophy, which clearly differentiates the retailer from other main foodstore operators in the UK market. Aldi is not a 'one-stop' shopping destination and as a consequence, it is able to operate complementarily alongside local traders (including service providers), independent retailers and other supermarkets, with customers using a combination of Aldi and other facilities to fulfil their grocery and local service needs. This generates a propensity for linked trips and associated spin-off trade which brings qualitative benefits to all.
- 2.19 The catchment for a new store is localised and often shoppers to a new Aldi store are existing Aldi customers who have been travelling to their nearest store. A new store opening within their locality will divert existing Aldi trips and reduce the need to travel further afield. Again, this limits the extent to which other existing stores and centres are likely to be impacted by a new store opening, and also supports more sustainable shopping patterns overall.

3.0 PLANNING POLICY CONTEXT

- 3.1 This section reviews planning policy which is of relevance to the retail component of the proposed scheme and this Assessment. A comprehensive review of the policy context for the development as a whole is provided in the Planning Statement.

National Planning Policy Framework (NPPF)

- 3.2 The National Planning Policy Framework (NPPF) was published in February 2019 and sets out the Government's objectives for achieving sustainable development.
- 3.3 Of relevance to this Assessment, Section 7 (Ensuring the Vitality of Town Centres) sets out the retail planning framework. In relation to this type of scheme and location, paragraph 86 requires a 'sequential test' to be applied to planning applications for main Town Centre uses not in a Centre and not in accordance with an up-to-date Development Plan. This requires an assessment of Town Centre, edge-of-centre, then out-of-centre locations. For edge and out-of-centre schemes, preference should be given to accessible sites well connected to the Town Centre and requires applicants to demonstrate flexibility in terms of format and scale. It should be noted that the term 'Town Centre' also applies to District and Local Centres in the NPPF.
- 3.4 Paragraph 89 requires an impact assessment for development which is over a locally set floorspace threshold (or the default threshold of 2,500 sqm gross in the absence of a locally set threshold) outside of Town Centres and not in accordance with an up-to-date Local Plan and should assess the impact on:
- existing, committed and planned public and private investment in a Centre(s) in the catchment area of the proposal; and
 - Town Centre vitality and viability, including local consumer choice and trade in the Centre and wider retail catchment.

- 3.5 The sequential and impact assessment against the NPPF tests is detailed in Sections 5 and 6 of this Statement, respectively.

Planning Practice Guidance (PPG)

- 3.6 The Planning Practice Guidance (PPG) provides more detailed guidance to support the interpretation of the NPPF.

- 3.7 Of relevance to the proposed retail component, the PPG sets out guidance supporting paragraphs 86-90 of the NPPF and provides further detail in respect of undertaking sequential and impact assessments. In respect of impact, the PPG recognises that impact should be assessed on a 'like-for-like' basis in a particular sector and that retail uses tend to compete with their most comparable competitive facilities (ID: 2b-015-20190722).
- 3.8 The PPG also reinforces the NPPF in terms of the need for Local Planning Authorities to consider structural changes in the economy, in particular changes in shopping and leisure patterns and formats, the impact theses are likely to have on individual town centres, and how the planning tools available to them can support necessary adaptation and change (ID: 2b-001-20190722).
- 3.9 It is noted in particular, that evening and night-time activities have the potential to increase economic activity within town centres and provide additional employment opportunities. They can allow town centres to diversify and help develop their unique brand and offer services beyond retail (ID: 2b-001-20190722). This is pertinent to the application proposals.

The Development Plan

- 3.10 Section 38(6) of the Planning and Compulsory Purchase Act requires that planning applications are determined in accordance with the Development Plan unless material considerations indicate otherwise. The Development Plan for the Site comprises the following:
- Hart Local Plan 2016-2032 (Adopted 30 April 2020);
 - Saved Policies of the Hart District Local Plan (Replacement) 1996-2006
 - Hook Neighbourhood Plan 2018-2032 (February 2019)

Hart Local Plan 2016-2032

- 3.11 The Hart Local Plan was adopted in April 2020. Of most relevance to this application Policy ED4 (Town, District and Local Centres) requires proposals for main town centre uses that are not in a defined centre to satisfy the sequential test. In addition, retail development comprising a gross floorspace in excess of 1,000 sqm, that are not within a defined centre will need to undertake an impact assessment.

The policy states that proposals will be supported if it is demonstrated that it would not have a significant adverse impact on existing centres.

- 3.12 On the basis that the Application Site is not within a defined centre, there is a requirement to demonstrate compliance with both retail policy tests (as set out within the NPPF paragraphs 86 and 89).

Evidence Base

- 3.13 In order to inform the recently adopted Local Plan, the Council prepared a Retail, Leisure and Town Centres Study (RLTCS) (2015). The Study was published in two parts: Part 1 (P1) provides an indication of the need for additional retail floorspace over the period to 2032; and Part 2 (P2) provides a review of existing centres and considers the potential capacity to accommodate the need for additional floorspace requirements.
- 3.14 The RLTCS is underpinned by a household survey undertaken in September 2014 which represents the most up-to-date evidence of shopping patterns within the District. Whilst it is now some years since this survey was undertaken, there has been very little change in the convenience retail market within the Hook area since that time and for the purposes of this assessment, the survey results are considered to remain robust.
- 3.15 The RLTCS P1 provides an analysis of existing shopping patterns. This notes at paragraph 4.25 that *'convenience retail sales floorspace in the District is collectively trading about 44% above the national average'*. Whilst not drawn out further within the RLTCS, 'overtrading' of existing floorspace is a reasonable indicator of qualitative need for additional provision.
- 3.16 It is also noted within the RLTCS P1 that there is evidence of expenditure leaking outside the Borough. Whilst this in itself is not always representative of unsustainable shopping patterns, the RLTCS P1 notes that *'the level of expenditure attracted to Blackwater is surprising given the relatively limited provision of convenience goods stores in the centre, however the household survey results showed a high proportion of trips to the existing Aldi store, which suggests that this store in particular is trading at a level significantly above national average'* (paragraph 4.43).

- 3.17 The RLTCs P1 identifies quantitative capacity (based on ONS population projections) to support an additional 3,079 sqm net (4,399 sqm gross) within the District by 2022. Only 125 sqm net (179 sqm gross) of this 'capacity' is attributed to Hook. Whilst it is noted that these forecasts are based on adjusted market shares taking into account the new Sainsbury's which will have the effect of increasing Hook's overall market share and therefore capacity, the same logic would apply to further provision over and above the Sainsbury's, particularly in the specific case of an Aldi foodstore which would have realistic potential to divert and stem the flow of expenditure to Aldi, Blackwater. This in turn, will generate further capacity within the Hook area.
- 3.18 The floorspace requirements under the SHMA population projections are proportionately higher reflecting the potential for additional population growth (and associated increases in expenditure) over and above the ONS projections. Adopting the SHMA population leads to an increase in the convenience goods floorspace requirements for the District as a whole from 3,079 sqm net to 3,874 sqm net in 2022, and increasing to 4,904 sqm net (from 3,871 sqm net) by 2027. Whilst it is helpful context to understand whether a need exists in a certain area (at any given point in time), there is no requirement on the Applicant to demonstrate need and it is not a relevant consideration in the determination of this planning application or applications in general.
- 3.19 The RLTCs P2 provides a review of Hook District Centre which notes that the Centre has a very low vacancy rate (2.6%), suggesting that there is a strong demand for units. The RLTCs P2 also notes that the centre has good car parking provision and higher than average representation from A1 (retail, including retail services) and A2 (financial and business services) uses as key strengths. In terms of weaknesses, the RLTCs P2 identified a poor selection of comparison retailers and lower than average provision of A3 (restaurants) and A5 (fast food take away) operators, although the latter should not be considered to be a weakness in our view. The dispersed nature of the Centre was also noted as a weakness, restricting movement across the Centre.
- 3.20 Whilst the RLTCs P2 found Hook District Centre to have a good convenience retail offer, it is relevant to note that this included the Tesco store on Station Road which at that time formed an 'island' site with the defined District Centre boundary abutting its boundaries to the north and south. The RLTCs P2 subsequently recommended that the *'area to the south of the railway around Rawlings Road*

should be excluded from the town centre boundary' (paragraph 3.36). This recommendation was taken forward in the new Local Plan and the Tesco store continues to sit outside the District Centre boundary.

Policy Conclusions

- 3.21 Arising from the above review, the key retail policy issues to address relate to the compliance with the sequential and impact tests, which is detailed in Sections 5 and 6 of this Assessment.
- 3.22 Consideration against other relevant planning policies is set out in the Planning Statement.

4.0 RETAIL CONTEXT

Background

- 4.1 In order to understand the role and potential impact of the proposed foodstore Development, it is first appropriate to review and understand the profile of existing retail provision within Hook and its surroundings.
- 4.2 Based on the Survey Area used for the RLTCs (2015), Zones 6, 7 and 8 broadly correlate with Hart District boundary. The Application Site itself is located within Zone 8. A copy of the Survey Area Plan is included in **Appendix 3**. Zone 8 is a large zone which encompasses almost half the District, with Hook sitting broadly central within the Zone. The remaining half of the District is broadly divided between Zones 6 and 7.
- 4.3 Despite its size, existing foodstore provision within Zone 8 is largely limited to the Tesco on Station Road (1,100 sqm), just to the south of Hook District Centre. This compares to Fleet (Zone 6) which is represented by Waitrose (1,694 sqm), Sainsbury's (1,211 sqm) and Morrisons (2,066 sqm). In addition, planning permission has been granted for a new Aldi at Church Crookham (1,898 sqm) which will add further choice within the wider Fleet area. The existing pattern of provision is illustrated on the Foodstore Provision plan set out within the RLTCs (and re-provided in **Appendix 4**) which further highlights the relative lack of provision and choice within the Hook area.
- 4.4 It is however recognised that foodstore provision in Hook will be improved with the completion of the new Sainsbury's to the north-east of the District Centre. The proposed store comprises 5,335 sqm as currently approved (Ref: 13/01145/MAJOR), although it is noted that an application to reduce the size of the store to 4,576 sqm (as part of a wider suite of amendments) has been submitted (Ref: 20/01162/AMCON) and is awaiting determination. A separate appeal has recently been lodged by Sainsbury's against the Council for non-determination of an application (Ref: 13/01145/S106) to amend the S106 agreement linked to the original consent specifically in relation to highways improvement works. This has further delayed the delivery of the new store, although we understand that the original planning permission has in any event been implemented and therefore exists in perpetuity.

- 4.5 It remains that even with the new Sainsbury's coming forward in due course that the Hook area and Zone 8 as a whole will still be lacking in choice of foodstore provision relative to other areas within the District, and neighbouring authority areas. This is manifested by the significant overtrading of the existing Tesco store on Station Road (which is estimated to continue to over perform even after the Sainsbury's has been delivered) and the leakage of trade to other stores/centres beyond Zone 8.
- 4.6 Given the size of Zone 8 and Hook's central position within it, the proposed foodstore at the Application Site is expected to draw the majority of its trade from within this Zone. It is also anticipated, given the relative lack of existing provision within Zone 8, that there is a reasonable prospect for clawing back expenditure currently generated within Zone 8 but spent in other centres/stores located beyond, including in Fleet and Basingstoke. An analysis of existing shopping patterns within Zone 8 is set out in more detail below.

Existing Convenience Shopping Patterns

- 4.7 Our analysis draws on the results of the household survey underpinning the RLTCs (2015). We have applied up-to-date population and convenience goods expenditure data (published by Experian) to the convenience goods market share data (as set out in Table 4 of Appendix 2 to the RLTCs P1) which provides an up-to-date estimate of convenience goods expenditure flows across the Survey Area at 2021 and 2026.
- 4.8 **Table 3, Appendix 6** shows that Hook and the smaller centres of Hartley Witney and Odiham collectively retain 45% of expenditure generated within Zone 8. The majority of this (37%) is spent in the Tesco on Station Road. This means that 55% of expenditure generated within Zone 8 is currently being spent at other destinations located outside this Zone, including stores in Fleet (17%); Basingstoke (13%); Yateley (10%); and Blackwater (4%).

Health Check Assessment

- 4.9 The following provides an overview of Hook District Centre and our health check assessment findings. This draws on a site visit to the District Centre in May 2021, following the relaxation of the Government's Covid-19 restrictions which had allowed non-essential retail to resume trading (as of 12th April). We have also had

regard to the health check analysis set out in the RLTCs which provides a useful reference from which to draw comparisons with our own findings, including an indication of how the centre may have changed over time.

Hook District Centre

- 4.10 Hook is defined within the adopted Local Plan as a 'District Centre' alongside Blackwater and Yateley. As defined on the adopted policies map, the District Centre boundary runs along Station Road to just south of the railway line (excluding the Tesco store to the south), but also takes in parts of London Road (to the east and west) and Elms Road.
- 4.11 The District Centre provides a pleasant environment containing a mixture of historic buildings, such as the Grade II Listed White Hart Hotel, which are interspersed with more modern architecture. In environmental terms, it is considered to be generally of a good quality throughout. Whilst there are some lower quality and/or poorly maintained buildings, these tend to be towards the more peripheral locations of the Centre.
- 4.12 According to the latest survey by Experian Goad (November 2020), Hook comprises a total floorspace of 8,240 sqm gross, across 46 units. This represents an increase in six units since NLP's survey in 2015 (Table H.1, RLTCs P2). A detailed breakdown by goods category is set out within Table 4.1 below, along with how this compares to the national average both in terms of floorspace and number of units.

Table 4.1 – Hook Diversity of Uses

Goods Category	No. of Units	%	National Average (%)*	Floorspace (sqm)	%	National Average (%)*
Convenience	5	10.87	9.12	2,741	33.26	15.37
Comparison	10	21.74	27.50	901	10.94	31.61
Retail Services	14	30.43	15.64	1,189	14.43	7.20
Leisure Services	11	23.91	24.51	3,001	36.41	25.69
Financial & Business Services	4	8.70	9.25	288	3.49	6.96
Vacant	2	4.35	13.77	121	1.47	12.55
Total	46	100	100	8,240	100	100

Source: Experian Goad (November 2020)

- 4.13 Table 4.1 shows that there are five convenience retail units within the District Centre which is consistent with the 2015 survey. However, it is relevant to note this again includes the Tesco store to the south of the railway line, which sits outside the defined District Centre boundary. If we were to exclude the Tesco store, this would bring the Centre's overall representation within the convenience goods category to four units (8.89%) which is just below national average (9.12%). The remaining four convenience units that are located within the District Centre include a Budgens supermarket, two convenience stores (Premier Express and Mace) and a butchers (C Graves).
- 4.14 The centre has a comparison retail offer comprising 10 units (equating to 22% of all units) and 901 sqm gross floorspace. Whilst this level of provision is below the national average in unit count and floorspace terms, this is not inconsistent with the role and function of a District Centre and its position in the retail hierarchy. Comparison retailers within the centre include an antique shop, a carpet shop, two charity shops, a pharmacy (Boots), a gift shop, furniture shop and a newsagents amongst others.
- 4.15 Service uses account for 63% of all units within the centre (and 54% of total floorspace). The proportion of retail services is most notable, at 30.4%, it is almost double the national average (15.6%). It is also this category which has experienced the highest levels of growth since the 2015 survey. Retail services within the centre include a post office, dry cleaners, optician, travel agent, four health and beauty providers, two petrol filling stations and three vehicle repair and service facilities.
- 4.16 Leisure services are broadly in line with the national average (in unit terms) and include two cafes, two pubs, a restaurant, a hotel and a number of takeaways. Overall representation within the Financial & Business Services category is more limited (and marginally below average). It is also evident that there has been a marginal reduction of units within this category since the 2015 survey (-2 units), although this is likely reflective of the modal shift towards online services.
- 4.17 There are currently just two vacant units within the centre which equates to a below average vacancy rate of 4.35%. Whilst we note that there has been an increase in vacant units since 2015 (+1 unit), the overall vacancy rate remains well below the national average (13.8%) and is therefore regarded as a positive indicator of good health and resilience at a time when the retail market is highly challenged.

- 4.18 The above analysis demonstrates that Hook has a reasonable offer, with a notable service function, which is considered consistent with a centre of its scale and position in the retail hierarchy. The relatively limited changes since the 2015 survey is also suggestive of the Centre's overall stability and resilience to external factors.
- 4.19 Overall, we consider Hook to be performing well. The centre has a relatively limited convenience goods offer, with provision largely catering toward localised, top-up shopping needs. Whilst its comparison offer is below average, what is provided is considered reasonable and consistent with a centre of its scale and position in the retail hierarchy. The Centre has a predominant service offering and function which is likely to be a key attractor of trips. The centre also benefits from an overall pleasant environment with scattered buildings of character which add to the overall quality of the environment, albeit it is noted that there are also more peripheral areas which are in need of enhancement. Overall, Hook is considered to be a vital and viable centre.

Committed Development

- 4.20 We are aware of the following commitments involving additional convenience retail floorspace within the catchment area of the proposal.

Sainsbury's, London Road, Hook

- 4.21 The Sainsbury's site is located to the north-west of Hook District Centre, to the north of London Road and east of Griffin Way North. Planning permission was originally granted in June 2014 (Ref: 13/01145/MAJOR) for a foodstore comprising 5,081 sqm gross floorspace (2,792 sqm net sales of which 2,317 sqm would be for convenience goods and 475 sqm for comparison goods). The original permission has been implemented through site clearance (and confirmed by a lawful development certificate¹) and is therefore extant.
- 4.22 More recently Sainsbury's have sought amendments to the original planning permission, including a reduction in overall floorspace (to 4,576 sqm gross) (Ref: 20/01162/AMCON). This application is currently undecided pending a related application to amend the S106 agreement attached to the original permission (Ref: 13/01145/S106). This application is presently subject to an appeal against non-determination. Whilst this has delayed construction and it is not presently known

¹ Ref: 17/01558/LDC

when the foodstore will come forward, the most recent applications (and appeal) point towards the retailer's commitment to the Site and future delivery of the store.

Aldi, Beacon Hill Road, Church Crookham

- 4.23 In August 2019 planning permission (Ref: 18/00694/OUT) was granted for an Aldi foodstore as part of the redevelopment of the former Vertu site on Beacon Hill South to the east of Church Crookham. Alongside a series of employment units (and a non-food retail unit pre-let to Home Bargains), the proposed foodstore will comprise 1,898 sqm gross (1,254 sqm sales area). Reserved matters was subsequently approved in November 2019 (Ref: 19/01867/REM) for a slightly reduced foodstore comprising 1,725 sqm gross albeit providing the same net sales area (1,254 sqm) for convenience goods. Construction commenced in March 2021 and is due to be completed by the end of the year.
- 4.24 The above commitments have been factored into our assessment of impact, set out in Section 6.

5.0 SEQUENTIAL ASSESSMENT

- 5.1 Local Plan Policy ED4 requires proposals for main town centres uses that are not in the defined centres to satisfy the sequential test.
- 5.2 The sequential test, as set out in paragraph 86 of the NPPF, requires proposals for main town centre uses to be located in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (paragraph 86).
- 5.3 The NPPF (paragraph 87) includes the requirement to demonstrate flexibility on issues such as format and scale, but does not require the applicant to disaggregate the scheme. Case law² has established that “suitable” and “available” means suitable and available for the broad type of development that is proposed in respect of the approximate (rather than precisely the) size, type and range of goods that are proposed.
- 5.4 The Application Site is located ‘out-of-centre’ in retail policy terms, and we have therefore undertaken an assessment of sequentially preferable sites. The scope of our assessment has been presented to officers at the Council as part of pre-application discussions. No additional sequential sites were identified for assessment as part of this process.

Methodology and Approach

- 5.5 For the purposes of this assessment, the Proposed Development comprises a total of 14,175 sqm gross, including a foodstore component of 1,963 sqm. Whilst there is no longer requirement to assess the proposals in a disaggregated form, it is acknowledged that the proposed foodstore is a distinct component which does not inextricably link to the wider employment floorspace proposed (albeit there are mutual benefits to their co-location). For robustness, we have therefore undertaken our assessment on the basis of accommodating the proposed foodstore in isolation.
- 5.6 As set out within Section 2, Aldi have a longstanding requirement for a store in the Hook area which is a direct reflection of where they consider there to be a

² Rushden Lakes (APP/G2815/V/12/2190175); Scotch Corner (APP/V2723/V/15/3132873 & APP/V2723/V/16/3143678); and Aldergate Properties Ltd v Mansfield District Council (July 2016).

need/demand for a discount offer which is operationally distinct to the more traditional food retailers such as Tesco and Sainsburys.

- 5.7 The Application Site has been identified by Aldi following a thorough review of potential opportunities and meets Aldi's key locational requirements. As noted in Section 2, Aldi's business model is predicated on securing efficiencies in operation and this in turn dictates the extent to which they are able to compromise in terms of scale and format of their stores. The site area within the Application Site to accommodate the proposed Aldi, extends to 0.7ha which is consistent with Aldi's requirements. However, in order to demonstrate flexibility, we have assessed potential sites on the basis of whether they are considered suitable and available for the broad type of development that is proposed.

Sequential Site Assessment

- 5.8 In identifying potential sites we have had regard to the RLTCs, which identifies the following sites in or on the edge of Hook District Centre (as defined by the District Centre boundary shown on the adopted Policies Map):

- Grand Parade, Station Road (in centre);
- Crossways Manor Car Park, Reading Road (in centre); and
- Hook Service Station, London Road (in centre).

- 5.9 It is not considered necessary to widen the area of sequential search beyond Hook, as such locations would not benefit the residents of Hook or meet the operational/locational need identified by Aldi.

Grand Parade, Station Road

- 5.10 The circa 0.2ha site comprises a 1970s shopping precinct with retail units at ground floor level and two storeys of residential use above. The precinct is well set back from the main road and includes parking to the front and rear. The precinct comprises a total of 7 retail units, the largest of which is occupied by a Premier Express convenience store. There were no vacant units at the time of our site visit.
- 5.11 There are evidently a range of existing, active uses on the site, within multiple ownerships/tenancies, including a number of residential properties. For this reason,

the Site is not considered available, either now or within a reasonable timescale to accommodate the proposed foodstore

- 5.12 In addition, at 0.2ha the site is of an insufficient scale to accommodate the proposed foodstore, even adopting a flexible approach to format and scale. By virtue of its physical constraints, the site is not therefore considered suitable to accommodate the proposed foodstore.
- 5.13 Taking in account the above findings, the site can be discounted as it is not suitable for the proposed foodstore and is not available.

Crossways Manor Car Park, Reading Road

- 5.14 The circa 0.3ha site comprises a surface level car park offering 68 long stay parking spaces, operated on a 'Pay and Display' basis. There is a small retail unit (currently occupied by a barbers) within the southern portion of the site, fronting onto London Road.
- 5.15 The site provides the main car park serving the wider District Centre and is currently in active use. We are not aware of the site being marketed for redevelopment and the loss of car parking is likely to be a significant consideration in any redevelopment of the site. Only if the loss of parking is acceptable to the Council, may the site be considered available for development.
- 5.16 At circa 0.3ha, the site is of an insufficient scale to accommodate the Proposed foodstore even adopting a flexible approach to format and scale. Development on the site would be further constrained by any requirement to re-provide parking spaces in lieu of existing provision in terms of both its physical capacity and scheme viability. In this respect, we do not consider the site to be suitable to accommodate the proposed foodstore
- 5.17 Taking in account the above findings, the site can be discounted as it is not suitable for the proposed foodstore and is not available.

Hook Service Station, London Road

- 5.18 The circa 0.3ha site currently comprises a 4-pump petrol filling station (PFS) and associated kiosk. To the rear of the PFS, there is an MOT testing centre, a hand car wash facility and a used car sales operation with associated forecourt.
- 5.19 The site is currently in active use for a range of vehicle-linked operations which appear to be operated by separate business entities. Given that the vast majority of the site is within active use and operated by separate entities, we do not consider the site as a whole to be available, either now or within a reasonable period to accommodate the proposed foodstore.
- 5.20 At circa 0.3ha, the site is of an insufficient scale to accommodate the proposed foodstore even adopting a flexible approach to format and scale. The access to the site and proximity to the junction with Reading Road may also present a highways constraint, particularly given the nature of the proposed foodstore, which is likely to be subject to higher trips rates than the existing uses. In this respect, we do not consider the site to be suitable to accommodate the proposed foodstore.
- 5.21 Taking in account the above findings, the site can be discounted on the basis that it is not suitable for the proposed foodstore and is not available.

Conclusions

- 5.22 From our assessment, we have not been able to identify any sequentially preferable opportunities within or on the edge of Hook District Centre that can be considered suitable and available for the proposed foodstore, even allowing for flexibility.
- 5.23 Against this background, we conclude that the proposed scheme complies with the requirements of the sequential test outlined in the NPPF and required by Local Plan Policy ED4.

6.0 IMPACT ASSESSMENT

- 6.1 This section sets out our assessment of the proposed foodstore against the NPPF impact tests at paragraph 89.
- 6.2 This test requires the proposed floorspace to be assessed against the following impacts:
- a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

Role and Function of the Proposed Foodstore

- 6.3 Before assessing the impact of the proposed foodstore on defined Centres, it is first important to understand the anticipated role, function and trading characteristics of the proposed foodstore within the Study Area.
- 6.4 The proposed foodstore is intended to provide both a qualitative and quantitative enhancement to existing convenience goods provision within the Hook area. It will also assist in clawing back convenience goods expenditure currently 'leaking' from Hook to other locations (as set out in Section 4). It will also provide a key amenity for the wider development proposed as part of the application and Bartley Way Business Park generally, something which is entirely lacking at present.
- 6.5 These matters are further explored in the Planning Statement, although the impact on the vitality and viability of defined centres, and potential spin-off benefits arising from the scheme, are set out in this Section.

Retail Impact

- 6.6 A quantitative assessment of the proposed foodstore's convenience goods turnover, estimated trade diversion and potential impact is set out at **Appendix 6**.

- 6.7 This has been prepared to inform our subsequent assessment against the NPPF impact criteria. The assessment has been undertaken on a goods-based approach reflecting the primary function and products to be sold from the proposed foodstore.
- 6.8 The assessment follow a standard step-by-step methodology, which can be summarised below.
1. **Study Area** – this is based on Zones 6-8 of the Survey Area adopted by the RLTCs (shown at **Appendix 3**). It is explained further in Section 4.
 2. **Population and Expenditure** – estimation of the population and its spending potential within the Survey Area at the base year of 2021 and projected forward to the design year of 2026 (i.e. 5 years from submission in line with the NPPF, as agreed at pre-application stage). These figures have been taken from Experian population data and growth rates from Experian Retail Planner Briefing Note 18 (October 2020).
 3. **Existing Patterns of Trade** – calculation of the turnover of existing retail locations at the base and design years (**Tables 3 and 4, Appendix 6**). These are derived from the results of the household survey underpinning the RLTCs, with the resultant combined market shares provided in **Table 2, Appendix 6**.
- 6.9 Prior to assessing the impact position, we set out below the main assumptions and data inputs into the assessment.

Population and Expenditure

- 6.10 **Table 1, Appendix 6** identifies a total population within the Study Area of 102,826 at 2021, increasing to 104,303 at 2026. The population at 2021 is estimated to generate a total of £241.2m convenience goods expenditure. This is forecast to increase to £244.2m by 2026 (a growth of £3.01m).

Existing Patterns of Trade

- 6.11 This has been derived from the market shares set out within the RLTCs for the main centres/stores which draw trade from within Zones 6-8 (**Table 2, Appendix 6**). The market shares are then applied to the total expenditure generated per zone (as

set out in **Table 1, Appendix 6**), which in turn provides an overall trade draw from within the Study Area (sub-total shown in **Table 3, Appendix 6**). In order to try and capture the full turnover of centres/stores we have combined the market shares for the remaining survey zones and, where relevant, included an allowance for inflow consistent with the assumptions adopted by the RLTCs.

- 6.12 This indicates that at the base year (2021), convenience stores in Hook (including the Tesco and 'other' provision) have a total combined convenience goods turnover of £32.4m, the majority of which is attributable to the Tesco store (£31.2m). This is a very strong turnover relative to the benchmark turnover (£14.4m), based on a sales density of £14,448 per sqm (as set out in **Table 5, Appendix 6**). The remaining £1.3m attributed to 'other' convenience stores in Hook is reflective of the smaller and more localised convenience goods offer within the District Centre (as described in Section 4).

Commitments

- 6.13 Table 6.1 below sets out the commitments which are considered to be of most relevant, and which have been factored into our assessment.

Table 6.1 Relevant Retail Commitments at 2026

	Convenience Sales Area (sqm net)	Sales Density (£ per sqm net)	Estimated Turnover (£m)
Sainsburys, Hook	2,792	£12,240	£28.4
Aldi, Church Crookham	1,254	£12,041	£12.1
TOTAL	4,046	-	£40.5

Source: Table 6, Appendix 6. May not cast due to rounding.

- 6.14 **Table 7, Appendix 6** shows the estimated turnover of centres/stores within the Study Area after taking the above commitments into account.

Proposed Scheme Turnover

- 6.15 Table 6.2 below shows the estimated turnover of the proposed foodstore at 2026 based on an average sales density of £12,041 per sqm net.

Table 6.2 Proposed Scheme Retail Turnover

	Convenience Sales Area (sqm net)	Sales Density (£ per sqm net)	Estimated Turnover (£m)
Aldi, Bartley Wood Business Park	1,052	£12,041	£12.7

Source: Table 8, Appendix 6. May not cast due to rounding.

- 6.16 Table 6.3 below shows the estimated trade draw pattern from within the Survey Area, which assumes that the majority of trade will be derived from Zone 8 (the 'location' Zone). This reflects the potential of the new foodstore, in providing additional choice within the Hook area, to clawback spend and increase overall convenience goods expenditure retention within Zone 8.
- 6.17 Recognising the locational characteristics of the Application Site, in close proximity to the strategic road network and on an employment site which is likely to experience inflow of commuters, we have also allowed for some trade draw from beyond Zone 8, and the Survey Area as a whole (i.e. inflow).

Table 6.3 Proposed Scheme Retail Turnover

Scheme Trade Draw	Zone 6	Zone 7	Zone 8	Zones 1-5 & 9	Inflow
Draw by Zone %	5%	5%	80%	5%	5%
Draw by Zone £m	£0.6	£0.6	£10.1	£0.6	£0.6
Market Share	0.75%	0.80%	12.6%	0.12%	-

Source: BW assumptions. May not cast due to rounding.

Convenience Goods Trade Diversion

- 6.18 The next step in the assessment is to calculate the level of diversion from existing convenience goods facilities to the proposed foodstore at 2026. It should be

recognised that the PPG (ID: 2b-015-20190722) states that assessments should be undertaken on a 'like for like' basis. The diversions are based on the distance from competing facilities, the size and anticipated function of the Proposed Foodstore, ease of access, existing known shopping patterns and the likely overlap in goods sold. The patterns of diversion are also informed by the flows derived from the RLTCs household survey.

6.19 Against this background, our trade diversion estimates are illustrated in Table 10, **Appendix 6**. The main diversions and impacts of the scheme from existing centres/stores within the Study Area are set out below:

- Tesco, Hook (£3.1m diversion / 14.7% impact)
- Sainsbury's, Hook (£3.2m diversion / 11.3% impact)
- Aldi, Blackwater (£2.0m diversion / 6.6% impact)
- Aldi, Church Crookham (£0.5m / 3.7% impact)
- Morrisons, Fleet (£0.5m / 1.8% impact)
- Other, Hook (£0.02m diversion / 1.3% impact)

6.20 In addition to the above, it is also estimated that £1.8m will be clawed back from foodstores in the Basingstoke area, which is located beyond the Survey Area.

6.21 Reflecting the proximity to and similarities in role / function, we anticipate that the greatest trade draw in monetary terms will be from the existing edge-of-centre Tesco on Station Road (£3.1m) and the proposed new out-of-centre Sainsbury's on London Road (£3.2m). As neither of these stores is located within Hook District Centre, they are not afforded any protection in retail policy terms.

6.22 Given the more limited convenience retail offer within Hook District Centre itself, we estimate only a marginal trade draw of £0.02m which equates to a convenience goods impact of 1.3%. Having regard to the wider role and function of the District Centre and its overall vitality and viability (as set out in Section 4), such an impact is not of a level which would be classified as significantly adverse.

6.23 Finally, we estimate that approximately £2.0m will be diverted from the in-centre Aldi in Blackwater, equating to a 6.6% impact on this store. It is estimated that the proposed Aldi in Hook will provide a more conveniently located Aldi offer for those residing within Zone 8 which will divert existing trips to the Aldi in Blackwater and contribute towards stemming the flow of expenditure beyond Zone 8. Our analysis

shows that even with a loss of £2.0m, the Aldi in Blackwater will continue to trade strongly and well in excess of its company average turnover. We do not therefore consider that an impact of 6.6% on this store will lead to a significant adverse impact on Blackwater District Centre as a whole.

- 6.24 Impacts on other centres are all below 2%, which is not considered to be at a level which would be classed as significantly adverse.
- 6.25 Overall we estimate that the proposed foodstore will help to claw back approximately £5.0m (6.2%) of expenditure generated within Zone 8 which is currently spent in other centres/stores located further afield. By increasing the level of expenditure retained locally, this has the potential to directly benefit Hook District Centre through linked trips that would not otherwise occur if residents continued to travel further afield. This, in turn, has the potential to reduce or offset the level of impact identified on the District Centre (as set out in paragraph 6.22).

Policy Assessment

- 6.26 From the findings of our health check and the quantitative impact analysis undertaken above, we set out below our assessment of the proposed foodstore against the key NPPF impact test criteria. In this respect it should be noted that the NPPF test relates to the Centre as a whole (i.e. not a single goods category) and does not seek to protect individual operators from competing schemes, provided that the impacts on the Centre as a whole are not classed as significantly adverse.

Impact on Town Centre Investment

- 6.27 The potential for impact on town centre investment is effectively assessed in relation to the trade diversion and impact on Town Centre vitality and viability. On the basis that we have identified only a marginal trade draw (£0.02m) equating to an impact of 1.3% on the town centre's convenience stores (i.e. not the town centre as a whole), we do not consider that the proposed foodstore will undermine or result in a significant adverse impact upon existing investment in Hook. Further we are not aware of any committed or planned investment in Hook District Centre that will be impacted.

Impact on Town Centre Vitality and Viability including Consumer Choice and Trade

- 6.28 Our survey and assessment of Hook District Centre has found that it is vital and viable, albeit it has a relatively limited convenience goods offer of a more localised scale. As set out in **Table 10, Appendix 6**, the scheme is expected to draw £0.02m of trade from the District Centre's convenience stores, equating to an impact of 1.3% on its convenience goods turnover.
- 6.29 The above levels of trade diversion and impact are not considered to be classed as 'significantly adverse' in either their magnitude or their effect on the District Centre. In particular, it is important to view the levels of trade diversion in the context of the District Centre's overall performance, turnover and also its good health, as detailed in Section 4. Our conclusions on impact are reinforced through the overall limited role that the District Centre has as a main-food convenience shopping destination, as detailed in Section 4.
- 6.30 The Centre will continue to attract regular trade and footfall primarily as a result of its wider range of local retail and services which will not be affected by the proposed foodstore.

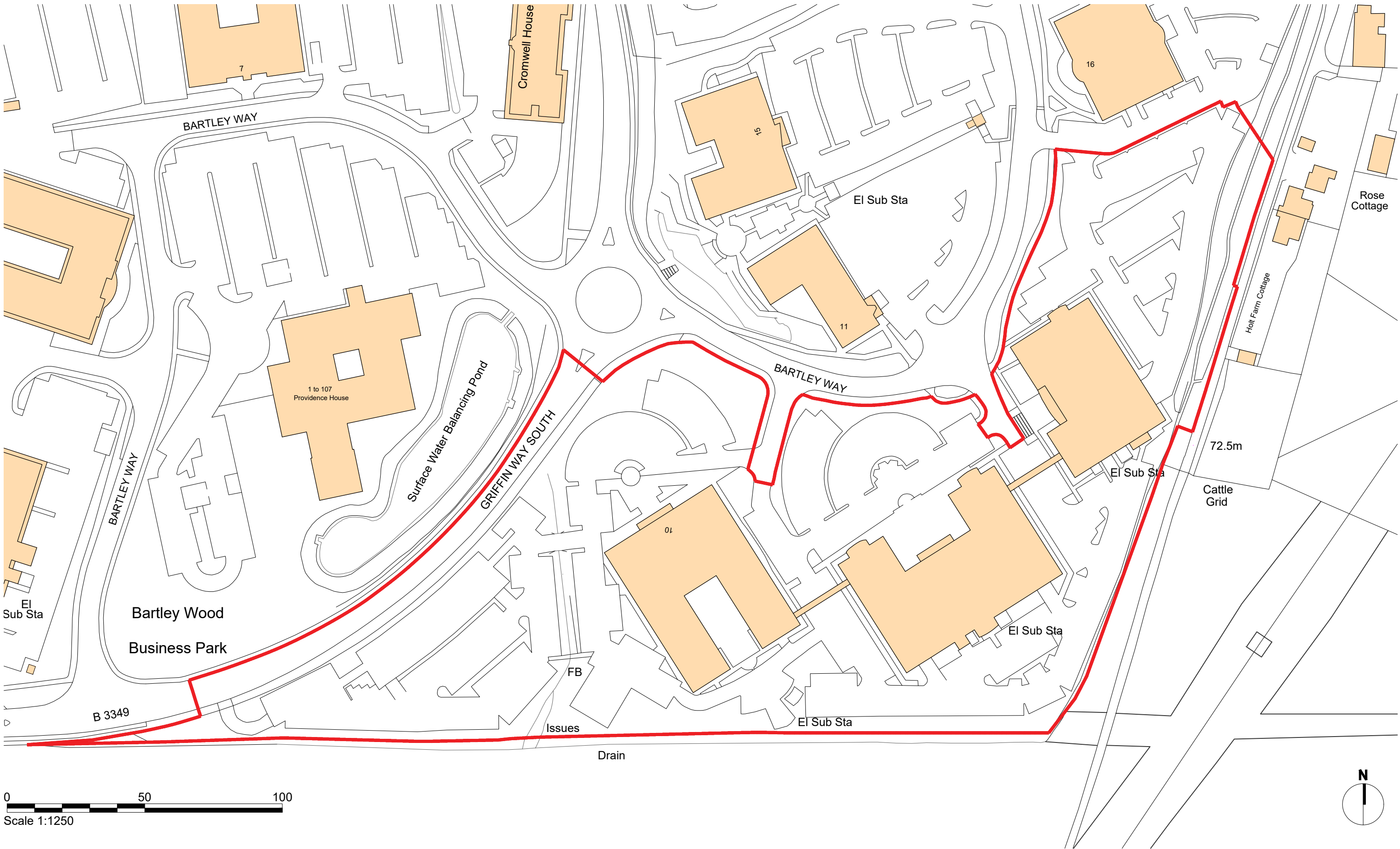
Summary and Conclusions

- 6.31 Arising from the above assessment, we draw the following conclusions:-
- Compliance with the sequential approach under NPPF paragraph 86 has been demonstrated as there are no sequentially preferable sites within Hook District Centre which are suitable and available, even allowing for flexibility in approach. The Application Site is therefore considered the most appropriate opportunity to deliver the proposed foodstore.
 - There is no evidence that the proposal will lead to significant adverse impacts on Town Centres in terms of investment, trade / turnover and overall vitality and viability under NPPF paragraph 89.
- 6.32 As compliance with the sequential and impact tests have been demonstrated, the scheme complies with NPPF paragraph 90 and in turn Local Plan Policy ED4 and should be determined positively.

7.0 SUMMARY AND CONCLUSIONS

- 7.1 This Assessment has been prepared to consider the appropriateness of the proposed Class E(a) foodstore use forming part of the proposed redevelopment of 260, 270 & 280 Bartley Wood Business Park, Hook.
- 7.2 The proposed foodstore is intended to be occupied by Aldi who have a longstanding requirement for a store in the Hook area. As set out in detail in Section 2, Aldi operate a distinct business model which differentiates the retailer from other mainstream foodstore operators in the area, including Tesco and the proposed Sainsbury's. As such it is considered that the proposed store will contribute towards increasing overall choice and competition in the Hook area, in a manner which will complement existing and proposed stores.
- 7.3 Having considered alternative, more central sites, it has been demonstrated that there are no sequentially preferable locations which are suitable and available to accommodate the proposed foodstore, even allowing for flexibility in approach. The Application Site therefore represents the only realistic opportunity to accommodate Aldi's longstanding requirement and to harness their investment in the area.
- 7.4 The proposed foodstore (in addition to the new Sainsbury's) will contribute towards improving the overall foodstore offer within the Hook area. The proposed store will also provide a key amenity and benefit for the wider Business Park, something which is currently lacking in the area. Such provision is expected to have a positive impact on the overall attractiveness of both existing and the proposed new employment floorspace within the area. This in turn will help to bolster the overall viability of the Business Park as a key employment location moving forwards.
- 7.5 It has been demonstrated that the proposed foodstore will not have a significant adverse impact on investment in Centres. It is recognised that the scheme will draw some trade from existing Centres, however, the level of trade diversion and impact on town centre vitality and viability is considered to be within acceptable levels and would not be classed as 'significant adverse' against the NPPF impact tests.
- 7.6 Against this background, this Assessment demonstrates that the scheme complies with NPPF paragraph 90 and in turn the Development Plan. It is therefore entirely appropriate to grant permission for the Proposed Development in retail policy terms.

APPENDIX 1
SITE LOCATION PLAN



Offices
Woking
London
Milton Keynes
Warsaw

Architecture
Planning
Master Planning
Urban Design
Interiors
Landscape

12 Warren Yard,
Warren Park,
Milton Keynes,
MK12 5NW
01908 305 246

info@prc-group.com
www.prc-group.com

Revisions:
A. Hatch added to buildings

Drawn/Chkd: AMc
Date: May 21

Client:
XLB PROPERTY LTD & PATRON HOOK LTD

Project:
BARTLEY WOOD BUSINESS PARK, HOOK

Drawing Title:
SITE LOCATION PLAN

Scale @ A3: 1:1250	Checked by: ME	Date: MAY 21
Job No: 11248	Stage: PL	Drawing No: 100
Construction <input type="checkbox"/>	Preliminary <input type="checkbox"/>	Information <input type="checkbox"/>
Approval <input checked="" type="checkbox"/>	Tender <input type="checkbox"/>	

PRC Architecture & Planning



Figured dimensions only are to be used. All dimensions to be checked onsite. Differences between drawings and between drawings and specification or bills of quantities to be reported to the PRC Group. The copyright of the drawings and designs contained therein remains vested in the PRC Group

APPENDIX 2
PROPOSED SITE PLAN



UNIT	GF	FF	TOTAL GEA
1.	1,615 m ²	285m ²	1,900m ² / 20,451ft ²
2.	900m ²	158m ²	1,058m ² / 11,388ft ²
3.	785m ²	138m ²	923m ² / 9,935ft ²
4.	857m ²	169m ²	1,026m ² / 11,044ft ²
5.	1,300m ²	229m ²	1,529m ² / 16,458ft ²
6.	1,184m ²	208m ²	1,392m ² / 14,983ft ²
7.	1,092m ²	192m ²	1,284m ² / 13,821ft ²
8.	1,398m ²	246m ²	1,644m ² / 17,695ft ²
9.	1,238m ²	218m ²	1,456m ² / 15,672ft ²
Retail	1,963m ²	-	1,963m ² / 21,129ft ²
TOTAL			14,175m ² / 152,576ft ²

DEVELOPMENT AREA 3.9 Hectares

- KEY
- APPLICATION AREA
 - SOFT LANDSCAPE
 - NEW RETAINING WALL
 - WELDMESH FENCE
 - TIMBER POST & RAIL FENCE
 - BOARDED FENCE
 - ACOUSTIC BARRIER
 - TARMACADAM SURFACING
 - BRUSHED CONCRETE SERVICE YARD
 - NATURAL BLOCK PAVING TO VEHICLE AREAS
 - CHARCOAL BLOCK PAVING TO PEDESTRIAN AREAS
 - WELL CONSOLIDATED GRAVEL
 - AIR CONDITIONING PLANT ENCLOSURE
 - CYCLE SHELTER
 - DROP KERB
 - ELECTRIC VEHICLE CHARGING POINTS/ DUCTS FOR FUTURE POINT
 - PROPOSED TREES
 - EXISTING TREES
 - TREES TO BE REMOVED TO BOUNDARY

Client:
XLB PROPERTY &
PATRON HOOK LTD

Project:
BARTLEY WOOD BUSINESS PARK,
HOOK

Drawing Title:
PROPOSED SITE PLAN

Scale @ A0:
1:500

Checked by:
ME

Date:
MAY 21

Job No:
11248

Stage:
PL 102

Rev:
B

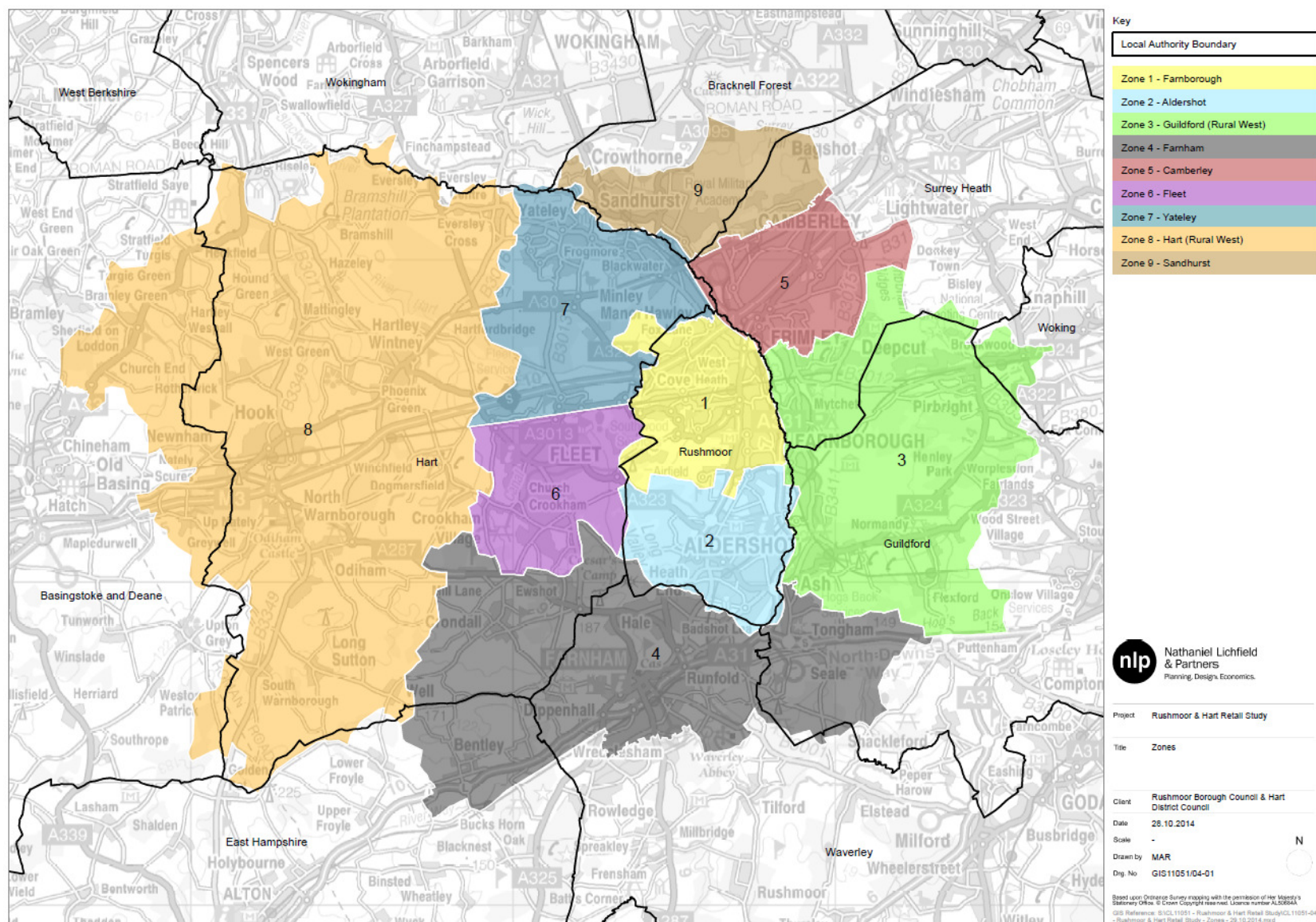
Issue Status:
Construction ☐ Preliminary
Information ☐ Approval
Tender ☐

Offices:
Woking
London
Milton Keynes
Warsaw

PRC Architecture & Planning

APPENDIX 3
SURVEY AREA PLAN

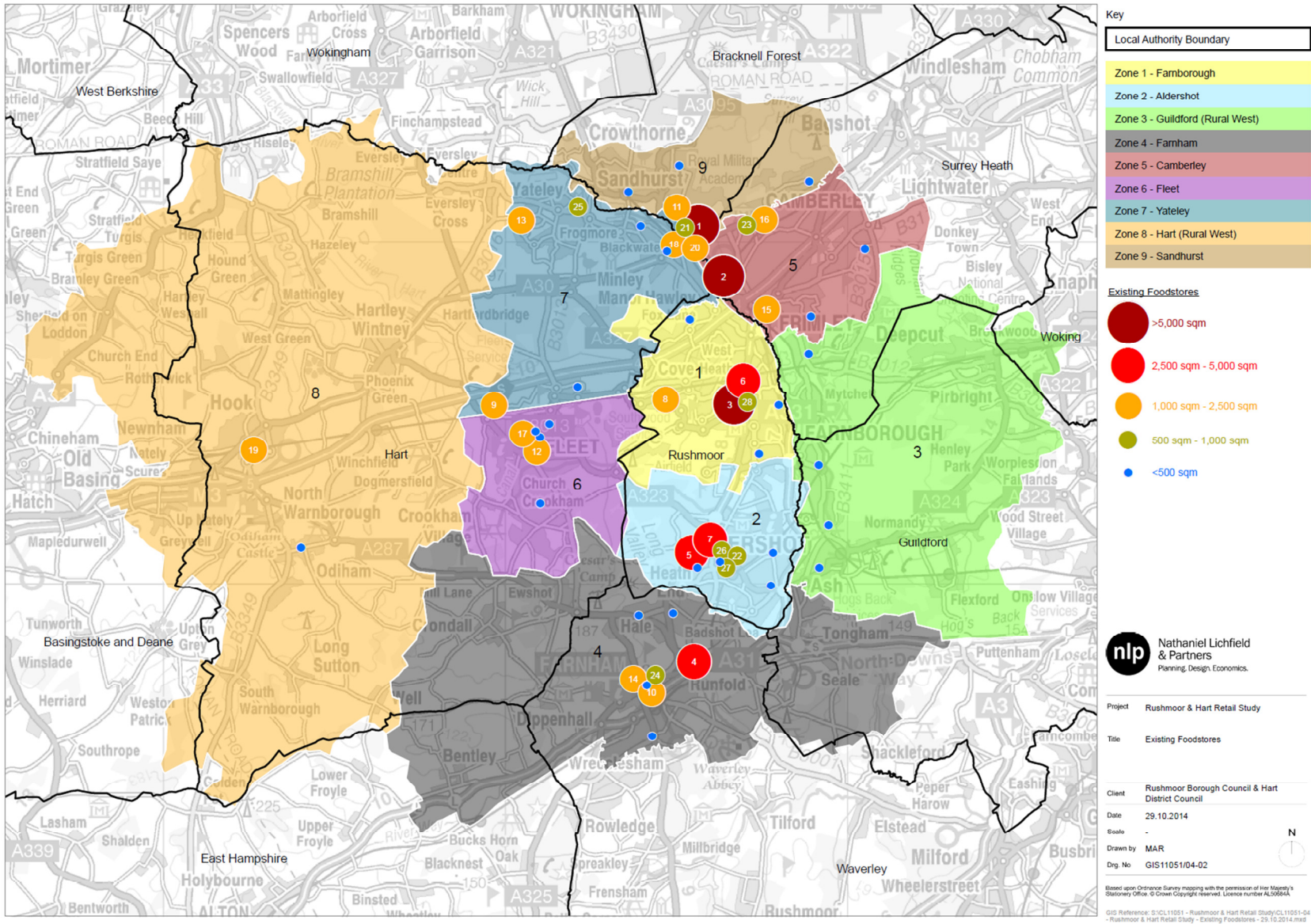
Plan A1.1: Study Area



APPENDIX 4

FOODSTORE PROVISION PLAN



Plan A1.2: Location of Existing Food Store Provision



APPENDIX 5

SEQUENTIAL SITE ASSESSMENT

1. Grand Parade, Station Road

Details:	
Name:	Grand Parade, Station Road
Site Area:	Circa 0.2ha
Location:	Situated to the east of Station Road and south of London Road.
Description:	The site comprises a 1970s shopping precinct with retail units at ground floor level and two storeys of residential use above. The precinct is well set back from the main roads and includes parking to the front and rear. The precinct comprises a total of 7 retail units, the largest of which is occupied by a Premier Express convenience store. There were no vacant units at the time of our site visit.
 	
Constraints:	
Adjacent Uses:	A range of Town Centre and commercial uses fronting Station Road and London Road; residential uses to the south-west.
Planning Policy:	<p>Located within the defined Town Centre Boundary. Adjacent to The Old White Hart public house which is designated as a Locally Significant Heritage Asset within the Hook Neighbourhood Plan (August 2019).</p> <p>The site is located within the defined Town Centre Boundary and is therefore defined as in-centre for the purposes of the sequential test.</p>
Access:	There is a single access point off Station Road.
Availability:	
There are a range of existing, active uses on the site, within multiple ownerships/tenancies, including a number of residential properties. Given the multiple ownership and the presence of existing residential uses, the site is not considered to be	

Aldi, Bartley Wood Business Park – Sequential Assessment

available, either now or within a reasonable timescale to accommodate the proposed development.

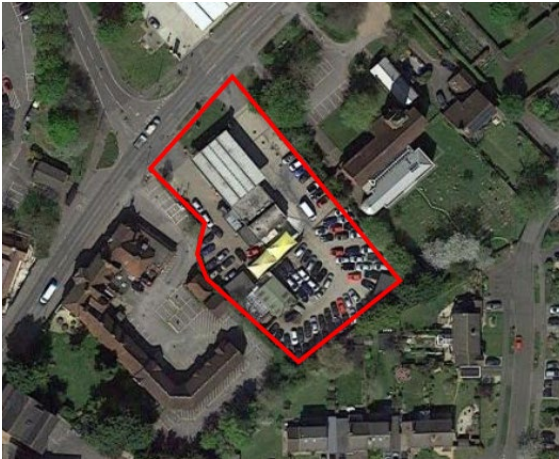

Suitability / Viability:

The site occupies a prominent position in the heart of the Town Centre. However, at 0.2ha the site is of an insufficient scale to accommodate the proposed development, even adopting a flexible approach to format and scale. For example, the likely land take for creating a suitable arrangement for access and servicing, would result in a far reduced and highly compromised area remaining to accommodate the foodstore building. By virtue of its physical constraints, the site is not therefore considered suitable to accommodate the proposed development.

Conclusion:

The site is neither available nor suitable and viable to accommodate the proposed development and can therefore be discounted as a sequentially preferable site.

2. Hook Service Station, London Road

Details	
Name:	Hook Service Station, London Road
Site Area:	Circa 0.3ha
Location:	Situated to the south of London Road, opposite the junction with Reading Road.
Description:	The site currently comprises a 4-pump petrol filling station (PFS) and associated kiosk. To the rear of the PFS, there is an MOT testing centre, a hand car wash facility and a used car sales operation with associated forecourt.
 	
Constraints:	
Adjacent Uses:	There is a public house directly adjacent to the south-west and religious building directly adjacent to the north-east. There are residential uses to the south. Another PFS is located almost opposite the site, to the north of London Road.
Planning Policy:	<p>The Site is located within the defined Town Centre Boundary. The adjacent religious buildings (St Johns Church) is designated as a Locally Significant Heritage Asset within the Hook Neighbourhood Plan (August 2019).</p> <p>The site is located within the defined Town Centre Boundary and is therefore defined as in-centre for the purposes of the sequential test.</p>
Access:	There is a separate access and egress onto London Road. The egress is located directly opposite the London Road junction with Reading Road.
Availability:	
The site is currently in active use for a range of vehicle-linked operations which appear to be operated by separate business entities. Given that the vast majority of the site is	

Aldi, Bartley Wood Business Park – Sequential Assessment

within active use and operated by separate entities, we do not consider the site as a whole to be available, either now or within a reasonable period to accommodate the proposed development.




Suitability / Viability:

At 0.3ha, the site is of an insufficient scale to accommodate the proposed development even adopting a flexible approach to format and scale. The access to the site and proximity to the junction with Reading Road may also present a highways constraint, particularly given the nature of the proposed development, which is likely to be subject to higher trips rates than the existing uses. In this respect, we do not consider the site to be suitable to accommodate the proposed development.

Conclusion:

The site is neither available nor suitable and viable to accommodate the proposed development. It can therefore be discounted as sequentially preferable.

3. Crossways Manor Car Park, Reading Road

Details	
Name:	Crossways Manor Car Park, Reading Road
Site Area:	Circa 0.3ha
Location:	Situated to the north of London Road and west of Reading Road.
Description:	Surface level car park owned and operated by Hart District Council. Provides 68 long stay parking spaces, operated on a 'Pay and Display' basis. There is a small retail unit (currently occupied by a barbers) within the southern portion of the site, fronting onto London Road.
  	
Constraints:	
Adjacent Uses:	Retail and commercial uses to the south; doctor's surgery to the west; new residential uses to the south-west; predominantly residential uses to the north and east.
Planning Policy:	<p>The northern part of the site is located within the defined Town Centre Boundary. The southern part however is located just outside the defined Town Centre Boundary.</p> <p>Adjacent to Acorn House which is designated as a Locally Significant Heritage Asset within the Hook Neighbourhood Plan (August 2019).</p> <p>The site is therefore defined as in/edge-of-centre for the purposes of the sequential test.</p>

Aldi, Bartley Wood Business Park – Sequential Assessment

Access:	Vehicular access and egress via Reading Road. Pedestrian access to town centre shopping area via London Road.
Availability:	
<p>The site is currently in active use as a car park serving the town centre. At the time of our site visit the car park appeared to be relatively well used, but it was not full. We are not aware of the site being marketed for redevelopment and the loss of car parking is likely to be a significant consideration in any redevelopment of the site. Only if the loss of parking is acceptable to the Council, may the site be considered available for development.</p>	
Suitability / Viability:	
<p>At 0.3ha, the site is of an insufficient scale to accommodate the proposed development even adopting a flexible approach to format and scale. Development on the site would be further constrained by any requirement to re-provide parking spaces in lieu of existing provision in terms of both its physical capacity and scheme viability. In this respect, we do not consider the site to be suitable to accommodate the proposed development.</p>	
Conclusion:	
<p>As it stands, the site is in active use as a car park and is not being actively marketed for development. Unless the Council would accept a loss of parking in this location, the site is not considered available. The site is also of an insufficient scale to accommodate the proposed development, even allowing for flexibility in format and scale. This would be further constrained by any requirement to re-provide parking provision as part of the development. The site is therefore discounted as sequentially preferable.</p>	

APPENDIX 6
IMPACT ASSESSMENT TABLES

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 1

ESTIMATED SURVEY AREA POPULATION AND CONVENIENCE GOODS EXPENDITURE

SURVEY AREA ZONE		6	7	8	TOTAL
Population	2021	36,519	34,506	31,801	102,826
Expenditure Per Head (£)		2,310	2,250	2,491	-
Total Expenditure (£m)		84.38	77.63	79.23	241.23
Population	2026	36,919	35,024	32,360	104,303
Expenditure Per Head (£)		2,298	2,250	2,491	-
Total Expenditure (£m)		84.83	78.80	80.62	244.24
Expenditure Growth:					
Convenience Goods Total 2021-2026 (£m)		0.45	1.17	1.39	3.01

NOTES:

1. Population and Expenditure taken from Experian Reports (2020) specific to the Survey Area.
2. Special Forms of Trading deductions and expenditure growth in line with Experian Retail Planner Briefing Note 18 (October 2020).
3. Expenditure data presented in 2019 prices.
4. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 2

EXISTING CONVENIENCE GOODS MARKET SHARES

Location	Zone (%)		
	6	7	8
Stores in Rushmoor Borough Sub-Total	14.8	8.6	0.7
Aldi, Blackwater	0.1	13.2	3.2
Other, Blackwater	0.5	7.9	1.0
Morrisons, Fleet	20.1	9.4	9.1
Sainsbury's, Fleet	20.6	3.0	1.7
Waitrose, Fleet	15.5	2.2	4.1
Other, Fleet	15.7	3.1	2.4
Tesco, Hook	0.0	0.0	36.7
Other, Hook	0.0	0.0	1.5
Waitrose, Yateley	0.5	9.0	9.4
Other, Yateley	0.0	7.4	0.4
Hartley Wintney	0.0	0.0	3.5
Odiham	0.2	0.0	3.0
Other Hart District	1.5	0.0	0.0
Hart District Sub-Total	74.7	55.2	76.0
Food Stores in Basingstoke	0.3	0.0	13.2
Food Stores in Camberley	0.9	8.3	1.8
Food Stores in Farnham	1.1	1.4	1.1
Food Stores in The Meadows	1.1	22.9	3.6
Other	7.1	3.6	3.6
Other Sub-Total	10.5	36.2	23.3
TOTAL	100.0	100.0	100.0

NOTES:

1. Derived from Table 4, RCLTCS (February 2015).
2. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 3

CONVENIENCE GOODS TURNOVER AT 2021

Location	Zone (£m)			Sub-Total (£m)	Zones 1-5 & 9 (£m)	Inflow (£m)	TOTAL (£m)
	6	7	8				
Stores in Rushmoor Borough Sub-Total	12.49	6.68	0.55	19.72	208.82	25.26	253.80
Aldi, Blackwater	0.08	10.25	2.54	12.87	15.58	1.50	29.95
Other, Blackwater	0.42	6.13	0.79	7.35	11.74	1.00	20.09
Morrisons, Fleet	16.96	7.30	7.21	31.47	0.82	1.70	33.99
Sainsbury's, Fleet	17.38	2.33	1.35	21.06	0.61	1.14	22.81
Waitrose, Fleet	13.08	1.71	3.25	18.03	4.61	1.19	23.83
Other, Fleet	13.25	2.41	1.90	17.55	5.02	1.19	23.76
Tesco, Hook	0.00	0.00	29.08	29.08	0.54	1.56	31.18
Other, Hook	0.00	0.00	1.19	1.19	0.00	0.06	1.25
Waitrose, Yateley	0.42	6.99	7.45	14.86	0.76	0.82	16.44
Other, Yateley	0.00	5.74	0.32	6.06	1.11	0.38	7.55
Hartley Wintney	0.00	0.00	2.77	2.77	0.00	0.15	2.92
Odiham	0.17	0.00	2.38	2.55	0.00	0.13	2.68
Other Hart District	1.27	0.00	0.00	1.27	1.24	0.13	2.63
Hart District Sub-Total	63.03	42.85	60.21	166.09	42.04	10.95	219.08
Food Stores in Basingstoke	0.25	0.00	10.46	10.71	0.13	0.00	10.84
Food Stores in Camberley	0.76	6.44	1.43	8.63	61.16	0.00	69.79
Food Stores in Farnham	0.93	1.09	0.87	2.89	86.13	0.00	89.01
Food Stores in The Meadows	0.93	17.78	2.85	21.56	51.95	0.00	73.51
Other	5.99	2.79	2.85	11.64	83.98	0.00	95.62
Other Sub-Total	8.86	28.10	18.46	55.42	283.35	0.00	338.77
TOTAL	84.38	77.63	79.23	241.23	534.21	36.21	811.66

NOTES:

1. Derived from Tables 1 & 2.
2. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 4

CONVENIENCE GOODS TURNOVER AT 2026

Location	Zone (£m)			Sub-Total (£m)	Zones 1-5 & 9 (£m)	Inflow (£m)	TOTAL (£m)
	6	7	8				
Stores in Rushmoor Borough Sub-Total	12.55	6.78	0.56	19.90	210.66	25.48	256.04
Aldi, Blackwater	0.08	10.40	2.58	13.07	15.82	1.52	30.41
Other, Blackwater	0.42	6.23	0.81	7.46	11.91	1.02	20.39
Morrisons, Fleet	17.05	7.41	7.34	31.79	0.83	1.72	34.34
Sainsbury's, Fleet	17.47	2.36	1.37	21.21	0.62	1.15	22.98
Waitrose, Fleet	13.15	1.73	3.31	18.19	4.64	1.20	24.03
Other, Fleet	13.32	2.44	1.93	17.70	5.06	1.20	23.95
Tesco, Hook	0.00	0.00	29.59	29.59	0.55	1.59	31.73
Other, Hook	0.00	0.00	1.21	1.21	0.00	0.06	1.27
Waitrose, Yateley	0.42	7.09	7.58	15.09	0.77	0.84	16.70
Other, Yateley	0.00	5.83	0.32	6.15	1.13	0.38	7.66
Hartley Wintney	0.00	0.00	2.82	2.82	0.00	0.15	2.97
Odiham	0.17	0.00	2.42	2.59	0.00	0.14	2.72
Other Hart District	1.27	0.00	0.00	1.27	1.24	0.13	2.65
Hart District Sub-Total	63.37	43.50	61.27	168.13	42.59	11.09	221.81
Food Stores in Basingstoke	0.25	0.00	10.64	10.90	0.13	0.00	11.03
Food Stores in Camberley	0.76	6.54	1.45	8.75	62.05	0.00	70.81
Food Stores in Farnham	0.93	1.10	0.89	2.92	87.22	0.00	90.14
Food Stores in The Meadows	0.93	18.04	2.90	21.88	52.73	0.00	74.61
Other	6.02	2.84	2.90	11.76	84.88	0.00	96.64
Other Sub-Total	8.91	28.53	18.78	56.22	287.01	0.00	343.23
TOTAL	84.83	78.80	80.62	244.24	540.26	36.57	821.07

NOTES:

1. Derived from Tables 1 & 2.
2. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 5

BENCHMARK TURNOVER OF EXISTING STORES WITHIN THE CATCHMENT AREA

	Floorspace Sales Area (sqm net)	Convenience Goods Sales Area (sqm net)	Sales Density (£ per sqm) (sqm net)	Benchmark Turnover (£m)
Aldi, Blackwater	1,115	1,004	12,041	12.09
Morrisons, Fleet	2,066	1,756	13,013	22.85
Sainsbury's, Fleet	1,211	1,090	12,240	13.34
Waitrose, Fleet	1,694	1,525	13,718	20.92
Tesco, Hook	1,110	999	14,448	14.43
Waitrose, Yateley	1,684	1,516	13,718	20.80

NOTES:

1. Sales Areas derived from Table 6B of RLTCs (2015).
2. Average sales densities for stores (ex. Aldi) derived from GlobalData (2020), re-based to 2019 Prices using Table 4B, Experian Retail Planner 18 (October 2020).
3. Aldi sales density derived from Aldi (in 2019 prices).
4. Turnover presented in 2019 prices.
5. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 6

ESTIMATED CONVENIENCE GOODS TURNOVER OF COMMITMENTS

	Floorspace Sales Area (sqm net)	Convenience Goods Sales Area (sqm net)	Sales Density (£ per sqm)	Estimated Turnover (£m)
Sainsbury's, Hook (Ref: 13/01145/MAJOR)	2,792	2,317	12,240	28.36
Aldi, Church Crookham (Ref: 18/00694/OUT)	1,254	1,003	12,041	12.08

NOTES:

1. Sainsbury's Convenience sales area derived from Table 7, Appendix 7 of WYG Retail Statement (June 2013) (LPA Ref: 13/01145/MAJOR).
2. Aldi sales area derived from Condition 14 of Decision Notice (Ref: 18/00694/OUT).
3. Aldi convenience sales area based on assumption that Aldi typically dedicate c.20% of their floorspace to comparison goods.
4. Average sales densities (ex. Aldi) derived from GlobalData (2020), re-based to 2019 Prices using Table 4B, Experian Retail Planner 18 (October 2020).
5. Aldi sales density derived from Aldi (in 2019 prices).
6. Turnover presented in 2019 prices.
7. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 7

CONVENIENCE GOODS TURNOVER AT 2026 - WITH COMMITMENTS

Location	Zone (£m)			Sub-Total (£m)	Zones 1-5 & 9 (£m)	Inflow (£m)	TOTAL (£m)
	6	7	8				
Stores in Rushmoor Borough Sub-Total	12.55	6.78	0.56	19.90	210.66	-	256.04
Aldi, Blackwater	0.08	10.40	2.58	13.07	15.72	1.52	30.30
Other, Blackwater	0.42	6.23	0.81	7.46	11.91	1.02	20.39
Morrisons, Fleet	12.75	7.14	4.43	24.32	0.64	1.72	26.68
Sainsbury's, Fleet	13.18	2.17	0.12	15.47	0.46	1.15	17.08
Waitrose, Fleet	11.14	1.63	2.30	15.07	4.48	1.20	20.75
Other, Fleet	13.32	2.42	1.93	17.67	5.06	1.20	23.93
Tesco, Hook	0.00	0.00	18.63	18.63	0.55	1.59	20.77
Other, Hook	0.00	0.00	1.20	1.20	0.00	0.06	1.26
Waitrose, Yateley	0.40	7.09	6.93	14.42	0.77	0.84	16.03
Other, Yateley	0.00	5.83	0.32	6.15	1.13	0.38	7.66
Hartley Wintney	0.00	0.00	2.81	2.81	0.00	0.15	2.96
Odiham	0.17	0.00	2.41	2.58	0.00	0.14	2.72
Other Hart District	1.27	0.00	0.00	1.27	1.24	0.13	2.65
Hart District Sub-Total	52.74	42.91	44.48	140.13	41.97	-	193.19
Food Stores in Basingstoke	0.25	0.00	6.45	6.70	0.13	-	6.84
Food Stores in Camberley	0.76	6.54	1.45	8.75	62.05	-	70.81
Food Stores in Farnham	0.93	0.69	0.89	2.51	86.03	-	88.54
Food Stores in The Meadows	0.93	18.04	1.13	20.11	51.59	-	71.70
Other	5.92	2.84	2.79	11.55	84.88	-	96.42
Other Sub-Total	8.80	28.11	12.71	49.62	284.69	-	334.30
SUB-TOTAL	74.09	77.79	57.75	209.64	537.31	-	783.53
Sainsbury's, Hook	0.71	0.71	22.69	24.11	2.84	1.42	28.36
Aldi, Church Crookham	10.87	0.30	0.18	11.35	0.12	0.60	12.08
TOTAL	85.67	78.80	80.62	245.10	540.27	-	823.97

NOTES:

1. Trade draw of commitments based on BW assumptions, having regard to WYG Retail Statement (June 2013) and Montagu Evans Retail Statement (March 2018).
2. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 8

ESTIMATED TURNOVER OF PROPOSED ALDI

Sales Area (sqm net)	Convenience Goods (sqm net)	Sales Density (£ per sqm)	Estimated Turnover (£m)
1,315	1,052	12,041	12.67

NOTES:

1. Sale Density derived from Aldi (in 2019 Prices).
2. Turnover presented in 2019 prices.
3. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 9

CONVENIENCE GOODS TURNOVER AT 2026 - WITH DEVELOPMENT

Location	Zone (£m)			Sub-Total (£m)	Zones 1-5 & 9 (£m)	Inflow (£m)	TOTAL (£m)
	6	7	8				
Stores in Rushmoor Borough Sub-Total	12.55	6.78	0.56	19.90	210.66	-	256.04
Aldi, Blackwater	0.08	10.24	0.73	11.05	15.72	1.52	28.29
Other, Blackwater	0.42	6.23	0.81	7.46	11.91	1.02	20.39
Morrisons, Fleet	12.75	7.14	3.95	23.84	0.64	1.72	26.20
Sainsbury's, Fleet	13.18	2.17	0.12	15.47	0.46	1.15	17.08
Waitrose, Fleet	11.14	1.63	2.03	14.80	4.48	1.20	20.48
Other, Fleet	13.32	2.42	1.93	17.67	5.06	1.20	23.93
Tesco, Hook	0.00	0.00	15.57	15.57	0.55	1.59	17.71
Other, Hook	0.00	0.00	1.19	1.19	0.00	0.06	1.25
Waitrose, Yateley	0.40	7.09	6.93	14.42	0.77	0.84	16.03
Other, Yateley	0.00	5.83	0.32	6.15	1.13	0.38	7.66
Hartley Wintney	0.00	0.00	2.81	2.81	0.00	0.15	2.95
Odiham	0.17	0.00	2.40	2.57	0.00	0.14	2.71
Other Hart District	1.27	0.00	0.00	1.27	1.24	0.13	2.65
Hart District Sub-Total	52.74	42.75	38.79	134.27	41.97	-	187.33
Food Stores in Basingstoke	0.25	0.00	4.68	4.93	0.13	-	5.06
Food Stores in Camberley	0.76	6.54	1.45	8.75	62.05	-	70.81
Food Stores in Farnham	0.93	0.69	0.89	2.51	86.03	-	88.54
Food Stores in The Meadows	0.93	18.04	1.13	20.11	51.59	-	71.70
Other	5.92	2.68	2.27	10.86	84.81	-	95.67
Other Sub-Total	8.80	27.95	10.41	47.16	284.62	-	331.78
SUB-TOTAL	74.09	77.47	49.76	201.33	537.24	-	775.14
Sainsbury's, Hook	0.28	0.51	20.67	21.47	2.27	1.42	25.16
Aldi, Church Crookham	10.66	0.18	0.06	10.90	0.12	0.60	11.63
Proposed Aldi, Bartley Wood	0.63	0.63	10.13	11.40	0.63	0.63	12.67
TOTAL	85.67	78.80	80.62	245.10	540.27	-	824.60

NOTES:

1. Trade draw of commitments based on BW assumptions.
2. Figures may not cast due to rounding.

ALDI, BARTLEY WOOD BUSINESS PARK
RETAIL IMPACT ASSESSMENT: CONVENIENCE GOODS

TABLE 10

CONVENIENCE GOODS TRADE DIVERSION & IMPACT AT 2026

Location	2026 Turnover WITH Commitments (1) (£m)	Estimated Trade Diversion (£m)	2026 Turnover WITH Development (2) (£m)	Impact of Development (%)
Tesco, Hook	20.77	3.06	17.71	14.7%
Sainsbury's, Hook	28.36	3.20	25.16	11.3%
Aldi, Blackwater	30.30	2.01	28.29	6.6%
Aldi, Church Crookham	12.08	0.45	11.63	3.7%
Morrisons, Fleet	26.68	0.48	26.20	1.8%
Waitrose, Fleet	20.75	0.27	20.48	1.3%
Other, Hook	1.26	0.02	1.25	1.3%
Hartley Wintney	2.96	0.01	2.95	0.3%
Odiham	2.72	0.01	2.71	0.3%
Food Stores in Basingstoke	6.84	1.77	5.06	-
Other	96.42	0.75	95.67	-
Proposed Aldi, Bartley Wood (4)	-	12.03	12.67	-

NOTES:

1. Derived from Table 7 (Total Column).
2. Derived from Table 9 (Total Column).
3. Trade Diversions are BW estimates.
4. Estimated trade diversion to proposed Aldi excludes inflow (£0.63m).
5. Figures may not cast due to rounding.