

Aldi, Salisbury Road, Totton

Table 1: Proposed Aldi Store - Turnover Estimate

New Destination	Net Floor Areas (sq. m)			Sales Density 2022 (£/sqm)		Benchmark Turnover 2022:		Benchmark Turnover 2027:		(£million)
	Total Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Total
Proposed Aldi, Totton	1,315	1,052	263	12,175	10,728	12.81	2.82	13.07	3.08	16.15

2019 Prices

Notes

- 1) Aldi Sales Density Figures taken from Mintel 2020 (2019 data) and grown by 0.4%pa (compound) to give a 2022 estimate.
- 2) Proposal convenience/comparison sales area based on an 80%/20% split.
- 3) Floorspace efficiency at +0.4% per annum for convenience goods and +1.8% per annum for comparison goods applied between 2022 and 2027

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Table 2: Estimated Turnover of Existing Convenience Goods Floorspace (£million)

Location	Floorspace (sq. m. Net)	Sales Density (£/sq. m. in 2022)	Base Year T/O (£m in 2022)	Design Year T/O (£m in 2027)
Totton Town Centre				
Asda, Maynard Road	2,545	13,768	35.04	35.75
Co-op, Rumbidge Street	132	11,295	1.49	1.52
Lidl, Commercial Road (extended)	1,017	10,659	10.84	11.06
Other	600	6,000	3.60	3.67
Total:	4,294		50.97	52.00
Totton Out-of-Centre/Other				
Morrisons, Spruce Drive	2,369	13,080	30.99	31.61
Co-op, Salisbury Road	200	11,295	2.26	2.30
Tesco Express, Watson Walk	151	13,382	2.02	2.06
Tesco Express, Nutshalling Close	125	13,382	1.67	1.71
Southampton City Centre				
Asda, Western Esplanade	2,948	13,768	40.59	41.41
M&S Foodhall, West Quay	836	10,427	8.72	8.89
Lidl, High Street	1,076	10,659	11.47	11.70
Tesco Express, High Street	215	13,382	2.88	2.94
Co-op, High Street	371	11,295	4.19	4.27
Other	1,120	6,000	6.72	6.86
Total:	6,566		74.56	76.07
Shirley District Centre				
Sainsbury's, Redcar Street	2,111	11,654	24.60	25.10
Co-op, Shirley Road	224	11,295	2.53	2.58
Tesco Express, Shirley Road	276	13,382	3.69	3.77
Lidl, Shirley Road	1,121	10,659	11.95	12.19
Other	1,661	6,000	9.97	10.17
Total:	5,393		52.74	53.80
Lordshill District Centre				
Sainsbury's, Lords Hill Way	2,931	11,654	34.16	34.85
Other	127	6,000	0.76	0.78
Total:	3,058		34.92	35.62
Other				
Tesco, Tebourda Way	3,068	13,382	41.06	41.89
Aldi, Bevois Valley Road	904	12,175	11.01	11.23
Tesco Express, Wimpson Lane	169	13,382	2.26	2.31
Lidl, the Avenue	1,058	10,659	11.28	11.50
Lidl, Brownhill Way	1,060	10,659	11.30	11.53

2019 Prices

Notes

1. Net Floorspace taken from WSP Planning Statement (Aldi, Millbrook, October 2020, Revised Table 2) and NLP NFDC Retail Study Update, 2010.
2. Sales densities derived from WSP Planning Statement (Aldi, Millbrook, October 2020, Table 2).
3. Floorspace efficiency rates (+0.4%pa) derived from Precisely Retail Expenditure Product Guide (2020/2021 Version) have been applied to generate base and design year convenience goods turnover estimates.
4. Floorspace for Totton town centre Lidl store assumes implementation of planning permission to extend sales area (ref. 21/11479).
5. 'Other floorspace' assumed to trade at £6,000/sqm based on Planning Potential estimates.

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Table 3: Proposed Aldi Totton - Solus Impacts (2027)

Location	Baseline T/O 2027 (£m in 2027)	Trade Draw: %age	£m	Post-Impact T/O £m	Impact %age
Totton Town Centre					
Asda, Maynard Road	35.75	15.0%	1.96	33.79	-5.5%
Co-op, Rumbidge Street	1.52	2.0%	0.26	1.26	-17.2%
Lidl, Commercial Road (extended)	11.06	15.0%	1.96	9.10	-17.7%
Other	3.67	2.0%	0.26	3.41	-7.1%
Total:	52.00	34.0%	4.44	47.56	-8.5%
Totton Out-of-Centre/Other					
Morrisons, Spruce Drive	31.61	15.0%	1.96	29.65	-6.2%
Co-op, Salisbury Road	2.30	2.0%	0.26	2.04	-11.3%
Tesco Express, Watson Walk	2.06	1.0%	0.13	1.93	-6.3%
Tesco Express, Nutshalling Close	1.71	1.0%	0.13	1.58	-7.7%
Aldi store proposal, Salisbury Rd., Totton	-	-	-	13.07	-
Southampton City Centre					
Asda, Western Esplanade	41.41	2.0%	0.26	41.15	-0.6%
M&S Foodhall, West Quay	8.89	1.0%	0.13	8.76	-1.5%
Lidl, High Street	11.70	2.0%	0.26	11.44	-2.2%
Tesco Express, High Street	2.94	0.0%	-	2.94	0.0%
Co-op, High Street	4.27	0.0%	-	4.27	0.0%
Other	6.86	1.0%	0.13	6.72	-1.9%
Total:	76.07	6.0%	0.78	75.28	-1.0%
Shirley District Centre					
Sainsbury's, Redcar Street	25.10	5.0%	0.65	24.44	-2.6%
Co-op, Shirley Road	2.58	0.0%	-	2.58	0.0%
Tesco Express, Shirley Road	3.77	0.5%	0.07	3.70	-1.7%
Lidl, Shirley Road	12.19	5.0%	0.65	11.54	-5.4%
Other	10.17	1.0%	0.13	10.04	-1.3%
Total:	53.80	11.5%	1.50	52.30	-2.8%
Lordshill District Centre					
Sainsbury's, Lords Hill Way	34.85	5.0%	0.65	34.19	-1.9%
Other	0.78	0.0%	-	0.78	0.0%
Total:	35.62	5.0%	0.65	34.97	-1.8%
Other					
Tesco, Tebourda Way	41.89	7.0%	0.91	40.97	-2.2%
Aldi, Bevois Valley Road	11.23	1.0%	0.13	11.10	-1.2%
Tesco Express, Wimpson Lane	2.31	0.5%	0.07	2.24	-2.8%
Lidl, the Avenue	11.50	1.0%	0.13	11.37	-1.1%
Lidl, Brownhill Way	11.53	10.0%	1.31	10.22	-11.3%
Other	-	5.0%	0.65	-	-
Total:	333.62	100.0%	13.07	333.62	

2019 Prices

Notes

- Trade draws estimated by Planning Potential ('PP') based on location and type of floorspace relative to application proposal and site.
PP estimates take full account of the likely extent of competition of existing stores with the Aldi proposal, including 'like-for-like' trading overlap.
- Impacts shown are 'solus' (they relate to the application only) and are expressed as a percentage diversion from from existing turnovers (in 2026).

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Table 4: Proposed Aldi Store - Turnover Estimate (Commitment)

New Destination	Net Floor Areas (sq. m)			Sales Density 2022 (£/sqm)		Benchmark Turnover 2022:		Benchmark Turnover 2027:		(£million)
	Total Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Total
Proposed Aldi, Millbrook	1,315	1,052	263	12,175	10,728	12.81	2.82	13.07	3.08	16.15

2019 Prices

Notes

1) Floorspace taken from WSP (Aldi, Auckland Road, Millbrook), October 2020 (Tables 1 and 1A).

2) Sales densities for Aldi and floorspace efficiency increases applied as per Table 1.

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Table 5: Proposed Aldi Totton - Cumulative Impacts (2027)

Location	Baseline T/O 2027	Trade Draw: Aldi Millbrook		Trade Draw: Aldi Totton		Total Diversion	Post-Impact T/O	Cumulative
	(£m in 2027)	%age	£m	%age	£m	£m	£m	Impact %age
Totton Town Centre								
Asda, Maynard Road	35.75	7.0%	0.91	13.5%	1.76	2.68	33.07	-7.5%
Co-op, Rumbidge Street	1.52	0.0%	-	2.0%	0.26	0.26	1.26	-17.2%
Lidl, Commercial Road (extended)	11.06	10.0%	1.31	13.5%	1.76	3.07	7.99	-27.8%
Other	3.67	1.0%	0.13	2.0%	0.26	0.39	3.28	-10.7%
Total:	52.00	18.0%	2.35	31.0%	4.05	6.40	45.60	-12.3%
Totton Out-of-Centre/Other								
Morrisons, Spruce Drive	31.61	0%	-	13.5%	1.76	1.76	29.85	-5.6%
Co-op, Salisbury Road	2.30	0%	-	2.0%	0.26	0.26	2.04	-11.3%
Tesco Express, Watson Walk	2.06	0%	-	1.0%	0.13	0.13	1.93	-6.3%
Tesco Express, Nutshalling Close	1.71	0%	-	1.0%	0.13	0.13	1.58	-7.7%
<i>Aldi store proposal, Salisbury Rd., Totton</i>	-	-	-	-	-	-	13.07	-
Southampton City Centre								
Asda, Western Esplanade	41.41	3.0%	0.39	1.5%	0.20	0.59	40.82	-1.4%
M&S Foodhall, West Quay	8.89	0.0%	-	1.0%	0.13	0.13	8.76	-1.5%
Lidl, High Street	11.70	5.0%	0.65	1.5%	0.20	0.85	10.85	-7.3%
Tesco Express, High Street	2.94	0.0%	-	0.0%	-	-	2.94	0.0%
Co-op, High Street	4.27	0.0%	-	0.0%	-	-	4.27	0.0%
Other	6.86	0.0%	-	1.0%	0.13	0.13	6.72	-1.9%
Total:	76.07	8.0%	1.05	5.0%	0.65	1.70	74.37	-2.2%
Shirley District Centre								
Sainsbury's, Redcar Street	25.10	10.0%	1.31	4.0%	0.52	1.83	23.27	-7.3%
Co-op, Shirley Road	2.58	0.0%	-	0.0%	-	-	2.58	0.0%
Tesco Express, Shirley Road	3.77	0.0%	-	0.5%	0.07	0.07	3.70	-1.7%
Lidl, Shirley Road	12.19	15.0%	1.96	4.0%	0.52	2.48	9.71	-20.4%
Other	10.17	3.0%	0.39	0.5%	0.07	0.46	9.71	-4.5%
Total:	53.80	28.0%	3.66	9.0%	1.18	4.83	48.97	-9.0%
Lordshill District Centre								
Sainsbury's, Lords Hill Way	34.85	2.0%	0.26	4.0%	0.52	0.78	34.06	-2.2%
Other	0.78	0.0%	-	0.0%	-	-	0.78	0.0%
Total:	35.62	2.0%	0.26	4.0%	0.52	0.78	34.84	-2.2%
Other								
<i>Aldi, Millbrook</i>	-	-	-	10.0%	1.31	1.31	11.76	-10.0%
Tesco, Tebourda Way	41.89	18.0%	2.35	6.5%	0.85	3.20	38.68	-7.6%
Aldi, Bevois Valley Road	11.23	5.0%	0.65	1.0%	0.13	0.13	11.23	0.0%
Tesco Express, Wimpson Lane	2.31	3.0%	0.39	0.5%	0.07	0.46	1.85	-19.8%
Lidl, the Avenue	11.50	5.0%	0.65	1.0%	0.13	0.78	10.72	-6.8%
Lidl, Brownhill Way	11.53	10.0%	1.31	9.5%	1.24	2.55	8.98	-22.1%
Other	-	3.0%	0.39	5.0%	0.65	1.05	-	-
Total:	333.62	100.0%	13.07	100.0%	13.07	25.35	334.41	

2019 Prices

Notes

- Trade draws to Aldi Millbrook are taken directly from WSP Planning Statement (Aldi, Millbrook, October 2020, Revised Table 3). Where draws from Lidl and Aldi are not specified by WSP (combined under 'other' by WSP), these are estimated by PP. A higher draw from Lidl, Brownhill Way has been assumed due to its relative proximity to the Millbrook site.
- Trade draws to Aldi, Totton taken from Table 3 (Solus impacts), adjusted to reflect the assumed 10% draw from Aldi, Millbrook. 5% draw from 'other' has been maintained.

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Table 6: Total Impacts (Cumulative) Including Comparison Sales

Location	Baseline T/O 2027 (Conv and Comp) £m	Total Diversion (Cumulative) £m	Post-Impact T/O £m	Cumulative Impact %age
Totton	117.16	7.96	109.20	6.8%
Southampton City Centre	1,841.87	2.11	1,839.76	0.1%
Shirley District Centre	118.78	6.01	112.77	5.1%
Lordshill District Centre	47.13	0.97	46.15	2.1%
Other	-	14.46	-	-
Total:		31.52		

2019 Prices

Notes

1. Total turnovers based on convenience turnovers (Table 2) plus comparison turnovers derived from WSP Table 4 ('grown' to 2027 design year applying floorspace efficiency at +1.8% pa)
2. Total cumulative diversion includes comparison sales. This is assumed to be diverted in proportion to convenience goods impacts.