Planning and Retail Statement

Full planning application for the proposed demolition of the existing foodstore (Use Class A1) and its replacement with a new discount foodstore (Use Class A1), together with reconfigured access and car parking, external lighting, drainage, landscaping, and other associated site works.

Land at Mafon Road, Nelson, Caerphilly, CF46 6PE.

April 2024

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Status: Final
Date: April 2024

For and on behalf of Avison Young (UK) Limited

1. Introduction

1.1 This Planning and Retail Statement has been prepared to accompany and support a full planning application for the demolition of an existing retail foodstore (Use Class A1) and its replacement with a new discount retail foodstore (Use Class A1), together with reconfigured access and car parking, external lighting, drainage, landscaping, and other associated site works on land at Mafon Road, Nelson, Caerphilly, CF46 6PE. The application is submitted by Avison Young on behalf of Aldi Stores Ltd.

1.2 The extent and location of the site is shown on the site location plan below.

Figure 1: Site Location Plan

1.3 Aldi's business model is described in Section 4 of this assessment, which explains that the whole of the Aldi product range delivers high-quality, low-cost food and convenience goods. A standardised store format is key to underpinning Aldi's business model as it enables the delivery of savings in the development, servicing, and stocking of Aldi's stores.

1.4 Aldi has sought to improve its store operating practices over the years to ensure that it continues to meet the needs of its customers whilst keeping cost to a minimum, thereby delivering exceptional value across its product range.

1.5 This statement seeks to demonstrate the acceptability of the proposed development in the context of relevant planning policy, taking into account the context of the site and the surrounding form of development.

2. Site Description

2.1 The site extends to approximately 1.02 hectares (2.51 acres) and currently accommodates the existing operational Co-op retail foodstore, together with associated car parking and access from Mafon Road.

2.2 The site is bounded to the north by the A472 Nelson Bypass, to the west by a Texaco petrol filling station, to the east (beyond the adjoining mixed-use development at Ty Du) by agricultural land, and to the south by rising open countryside.

2.3 The site is located to the south of Nelson (approximately 500m south), situated between Abercynon (approximately 2.5km west) and Ystrad Mynach (approximately 3km east). Along the A472 (where existing site access is located), commercial land uses include, a car repair, tyre centre and car sales. The Railway Inn public house is located to the west of the site at the crossroad junction of Llwyncelyn Terrace and Llanfabon Road. Residential development extends along both Llwyncelyn Terrace and Llanfabon Road.

2.4 Nelson is a village of approximately 4,700 people. The village centre includes a post office, bank, pharmacy, bakery, library, dentist, a doctor's surgery, and a central bus station. Llanfabon Infants School and Llancaeach Junior School are both located in Nelson.

2.5 The majority of Nelson, and the facilities within it, can be reached within 20 minutes on foot to/from the site. Cycling infrastructure within the vicinity of the site primarily includes the National Cycle Network (NCN) and roads that are conducive to cycling. NCN Route 47 routes to the east of the site and is accessible within 5 minutes via Caerphilly Road via Dynevor Terrace to the north of the site. This route provides a cycle link to Newport, Fishguard, Neath and Carmarthen.

2.6 The nearest bus stop is located adjacent to the site along Mafon Road providing services east and westbound. Both stops benefit from shelter, seating, and timetabling information. The local stops are served by bus service 78 which provides a route into Merthyr Tydfil and Pontypridd. It is also served by the C1 service, a Nelson local service, and the X38 which provides a connection from the site to Pontypridd and Bargoed.

2.7 The closest railway station to the site is Ystrad Mynach, located approximately 4 km to the east of the site. This train station provides services to Rhymney, Bargoed, Cardiff, and Penarth.

2.8 As part of the legal requirements of the Active Travel (Wales) Act 2013, all Welsh Councils must plan and submit suitable Active Travel routes for within their county, to earmark future expansion of the active travel network over a 15-year period. We note that a range of improvements in Nelson and the wider Caerphilly Borough area gained formal approval in January 2022 following lengthy and detailed public consultation. Notably, the routes include a traffic free link between Nelson and Ystrad Mynach as well as a link between Nelson and Abercynon via Treharris, creating a convenient connection to the local stations.

2.9 The site is in a sustainable and accessible location, benefitting from good walking and cycling links to the surrounding area via the existing infrastructure and good access to regular and frequent public transport services.

2.10 The site falls within the defined settlement boundary for Nelson, as defined by the proposals map accompanying the Caerphilly County Borough Local Development Plan (LDP) 2006-2021 (adopted 23rd November 2010). The site has no site-specific designation or allocation.

2.11 The site is not subject to any ecological or landscape designations and does not contain any Tree Preservation Orders.

2.12 There are no cultural heritage features recorded for the site on databases held by Cadw, the Royal Commission for Ancient and Historic Monuments in Wales or the Sites and Monuments Record. The site is not within or adjoining a conservation area and there are no Scheduled Ancient Monuments or listed buildings within the immediate vicinity of the site.

2.13 The site lies within an area that has been identified by the Coal Authority as containing potential hazards arising from former coal mining activity.

2.14 The site is located within Flood Risk Zone A which is considered to be at little or no risk of fluvial or tidal/coastal flooding, as defined by the Development Advice Map contained within Technical Advice Note 15: Development and Flood Risk (2004). As such, the justification test is not applicable and there is no need to consider flood risk further. Under the emerging revised TAN15, the site is not considered to be at flood risk from rivers or the sea but is considered to be at flood risk from surface water and small watercourses.

2.15 The site location plan clearly defines the site and its context.

3. The Proposed Development

3.1 The description of development for the proposed scheme (on the full planning application form) reads as follows:

> *"Demolition of existing retail foodstore (Use Class A1) and its replacement with a new discount retail foodstore (Use Class A1), together with reconfigured access and car parking, external lighting, drainage, landscaping, and other associated site works."*

3.2 The existing Co-op foodstore (use class A1), which is to be demolished, has a gross external area of 1,550 sqm, a gross internal area of 1,500 sqm, and a net retail sales area of 723 sqm. The proposed store will have a gross external area of 2,000 sqm, a proposed gross internal area of 1,910 sqm, and a net retail sales area of 1,356 sqm. It is proposed that 80% (1,085 sqm) of the net sales area of the proposed store will sell convenience goods, with the remaining 20% (271 sqm) selling comparison goods. This is illustrated on the proposed site plan and floor plan. The existing vehicular access from Mafon Road will be used to serve the proposed new foodstore. It will be served by 120 no. customer car parking spaces, including 5 no. accessible spaces for disabled persons only; 8 no. parent and child spaces; 4 no. active electric vehicle charging points (EVCPs) with provision for a further 20 no. EVCP spaces in the future; 4 no. motorcycle spaces, and 4 no. external Sheffield cycle stands (i.e. 8 no. cycle spaces).

3.3 The proposed building will be of a modern design with a mono-pitch roof set, sited along the application site's southern boundary and set back from Mafon Road (A472), orientated with the store entrance facing north into the centre of the site, whilst the service area and delivery bay is located to the western side of the building. In summary, the proposals comprise:

- A foodstore with a net retail sales area of 1,356 sqm;
- existing vehicular access from Mafon Road;
- 120 no. car parking spaces including 5 no. accessible spaces for disabled persons only; 8 no. parent and child spaces; 4 no. active electric vehicle charging points (EVCPs) with provision for a further 20 no. EVCP spaces in the future; 4 no. motorcycle spaces, and 4 no. external Sheffield cycle stands for secure cycle parking for up to 8 no. bicycles with staff cycle parking also provided internal to the foodstore warehouse;
- a scheme of hard and soft landscaping;
- drainage / SuDS features;
- covered trolley bay and cycle hoops;
- service yard to the western side of the proposed foodstore;
- lighting columns to car parking area;
- boundary enclosures, and
- totem sign (subject to a separate advertisement consent application).

Planning History

3.4 Based upon a search and review of the council's panning history records, there are a number of historic planning applications of relevance to the site. These are summarised below.

- 5/5/81/0231 –Alterations to building and change of use to shop (Kwik Save) - Granted 9th June 1981;
- 5/5/90/0184 –Erect extension and alterations to supermarket (Kwik Save) with additional car park and relocated access –Granted 6th June 1990;

F10/0483/ADV –Erection of 3 No. fascia signs (A/B & C) - externally illuminated by overhead trough lights and 1 x internally illuminated Totem sign (D) –Granted on 25th August 2010;
15/1088/FULL –Installation of an Automated Teller Machine (ATM) –Prior approval not required –Granted on 24th December 2015; and
15/1089/ADV –Installation of non-illuminated signs –Granted on 24th December 2015.

Pre-Application Enquiry

3.5 Avison Young, on behalf of Aldi, submitted a pre-application enquiry to Caerphilly County Borough Council on 19th July 2023 for the proposed demolition of the existing Co-Operative retail foodstore (Use Class A1) and its replacement with a new Aldi discount foodstore (Use Class A1), together with reconfigured access and car parking, external lighting, drainage, landscaping, and other associated site works.

3.6 This enquiry was accompanied by a series of proposed plans and drawings, and sought the Council's views of the proposals in respect of: the principle of the proposed development; the scope of the technical documents required in support of the planning application, and the form and content of the Retail Assessment, including key aspects of the sequential approach to site selection and the assessment of impact.

3.7 A pre-application meeting with the Council was held on 27th September 2023 and a written response (LPA Reference: PE/304/2022) was received on 27th October 2023. The comments and recommendations received have informed the design proposals which are explained in further detail in the submitted Design and Access Statement.

3.8 In accordance with the Town and Country Planning (Development Management Procedure) (Wales) Order 2012 (as amended), the draft planning application was placed on deposit for a 28-day consultation period (as part of the Pre-Application Consultation) which started on 29th February 2024 and ended on 28th March 2024.

3.9 A full PAC Report is submitted as part of the full planning application detailing the PAC programme and consultation process.

4. Aldi Stores Limited

4.1 Aldi is the applicant for this scheme and one of the world's leading grocery retailers. The company has built a network of stores in Europe, the USA and Australia. Aldi first entered the UK market in 1990 and has now expanded to over 950 stores across England, Scotland, and Wales.

4.2 Aldi stores offer the customer a carefully selected range of high quality, exclusive own label groceries at heavily discounted prices. These prices are guaranteed across the entire range of products. The aim is for goods to be sold with discounts of between 20-30% for a full shopping trolley. This is evidenced by the below chart published by independent consumers' association 'Which?' in March 2020. The chart compares the average cost of a trolley of 108 groceries and household essentials (i.e., a bulk food shopping trip) and shows, for example, that an equivalent shop at a mainstream foodstore such as Tesco, Morrisons or Sainsbury is at least 27% more expensive. In the case of Asda specifically (the closest major foodstore), Aldi is found to be 10% cheaper.

Figure 2 - Chart Comparing Average 108 Groceries and H Essentials
Source: Which? March 2020

4.3 Aldi regularly receives industry awards recognising the quality of its products and customer experience. Aldi was voted the nation's Favourite Supermarket and Favourite Wine Retailer at the 2019 Good Housekeeping Food Awards; named Best Value Supermarket at the Moneywise Home Finances Awards 2019; and Best Grocer at the Retail Week Awards 2019. For recognition of investment in people, Aldi was crowned Employer of the Year at The Grocer Gold Awards 2017, whilst they were named Grocer of the Year at The Grocer Gold Awards 2018.

How Aldi is different

4.4 Aldi has a very different approach to food retailing than other food retailers based on 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 is a 'deep discount' retailer.

4.5 The key aspects of the trading philosophy include:

- Maximum operational efficiency and cost control;
- Standard merchandising through the stores;
- Bulk displays in original shipping cases;
- Efficient operation from supplier to customer;
- Unique delivery system;
- Efficient checkout system;
- Carefully selected and limited core range of 2,000 products;
- Own label high quality products;
- Formidable buying power;
- High volume and turnover per product; and,
- Heavily discounted prices providing an average 20-30% saving across the entire range, compared with similar quality products.

4.6 The consequence of providing this value retailing concept and service, of high-quality food at heavily discounted prices, is that the design of the store and the sales area are uniform, in order to accommodate bulk food displays and provide the operational efficiency that a discount foodstore requires. These efficiencies are found across the entire operation from supplier to retail store and result in an enviable cost structure which allows Aldi to sell quality food at low prices and operate on much smaller margins than other foodstores.

4.7 As stated, Aldi stores offer a carefully selected and limited core range of good quality exclusive own labels at heavily discounted prices. Predominantly, the limited range of goods relates to a reduced range of variations on the same product line compared to most other supermarkets. These are the most popular items: the ones most used and needed in every household.

4.8 By limiting the core range, Aldi suppliers typically only need to produce one package size instead of multiple packages within the same category. With the higher volume of one item, Aldi achieve greater purchasing power. The limited core range further allows Aldi to apply its own label to most of its products (c.90%) which do not include costs that the national brands pass on through higher prices. This allows Aldi to gain a significant cost advantage over competitors without compromising quality.

4.9 The deliberate intention is to restrict the range of core goods to approximately 2,000 products in the interests of the consumer and operational efficiencies and pass these savings onto the customer. The restricted core range ensures a high volume and turnover of each individual item, resulting in a favourable cash flow with products effectively sold through the checkouts before they have been purchased centrally.

4.10 This is unlike the larger supermarkets which stock in the region of 20,000 –40,000 product lines, and more modest sized operators, with floor areas of 1,000 –1,500sqm selling 2,500 –4,000 products. Aldi do not sell cigarettes and tobacco products and their trading philosophy does not include a staffed butchery, fishmonger, bakery, delicatessen, or hot food counter, which are commonplace in larger supermarkets. Aldi stores also do not accommodate in store cafes / restaurants or franchises such as a Post Office, dispensing pharmacy, dry-cleaning, opticians, betting office, travel agent, mobile phone shop or photo processing.

4.11 Whilst the core range of products is limited, Aldi offers a significant choice of locally sourced produce. Where possible Aldi's 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.

4.12 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 a continued variation in the type of goods that may be on offer. This is a key difference for Aldi when compared to larger supermarkets that typically have 30-40% of their floor area for comparison goods, the majority of which is occupied by permanent product ranges.

4.13 How Aldi differs is demonstrated clearly by the trading philosophy. Aldi complement, rather than compete with, existing local traders, independent retailers, and other supermarkets, as well as service providers, as Aldi customers use 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.

Sustainable development

4.14 Aldi supports sustainable development and has a strong track record in delivering schemes which contribute to the needs of the local economy.

Catchment

4.15 As Aldi stores are of modest scale and fulfil a local shopping role, it means more than one store can be accommodated in a Local Authority area. In high population density areas such as towns and cities several Aldi foodstores can be sustained, reflective of the fact that each is modest in size. They work together as a network to serve the community, as opposed to mainstream foodstores whereby a single 'superstore' serves a much wider geographic area. The catchment for a new Aldi foodstore is therefore typically local in nature and often a proportion of the shoppers attracted are existing Aldi customers who have been travelling to their nearest store (possibly several miles away), but with a new store opening close by, this can reduce their need to travel.

4.16 Aldi's local presence can assist in clawing back expenditure being spent elsewhere by providing a foodstore where perhaps such a facility was not available. This is most important in locations where shops and services are limited and access to stores elsewhere is difficult. A new store helps to retain expenditure within a given catchment area, to the benefit of the community.

Store operation and design

4.17 The uniform internal layout of an Aldi store reflects the company philosophy of offering value for money through cost effective management and efficiency. The shop fittings are specifically designed and constructed to display the goods as received in their packing cases so there isn't a double handling of goods from packing cases to the shelves. It means new stock can be moved from the warehouse area to the shop floor quickly and in large quantities.

4.18 The operation of the store is designed to be efficient and practical for use by customers; ensuring the store offers inclusive accessibility to all. The efficient layout with typically only 4 or 5 aisles means customers can move through the store quickly. There is ease of access to goods with all shelving being within easy reach. As the range of goods is limited customers can find what they are looking for quickly. With goods being pre-packaged, such as fruit and vegetables, customer can identify goods quickly and shop efficiently. Importantly, there are long conveyors at the check-out that hold a customer's full shop to allow goods to be unloaded for scanning and payment quickly. Goods are re-loaded back into the trolley at the check-out and packing is undertaken at the customer's leisure beyond the check-out area.

4.19 Aldi recognises that design is a key consideration in the determination of applications for its stores. The external design has evolved over time and now the design for each store is consistent across Aldi's portfolio, promoting modern, smart buildings with clean lines and glazed frontages which meet customer expectations.

Accessibility

4.20 The local nature of many of Aldi's stores encourages high levels of pedestrian shoppers and users of public transport. At new stores, cycle stands are provided, close to the store entrance for natural surveillance and mostly under the store canopy, to encourage cycling as a mode of transport.

4.21 Aldi requires new stores to have car parking adjacent to cater for customers who choose this mode of transport. Most car trips to new Aldi stores are not new to the network but rather transferred or linked trips. A full explanation of this principle is set out in the accompanying Transport Assessment.

Residential amenity

4.22 The opening hours of Aldi stores are more limited than some other larger supermarkets which operate 24-hour. Currently Aldi stores operate 08:00 to 22:00 Monday to Saturday and for six hours between 10:00 to 16:00 on Sundays, to comply with Sunday Trading Laws. As Aldi stores are located in residential areas, Aldi is committed to being a responsible neighbour and seeks to ensure the amenity of residents is maintained.

Job creation and training

4.23 New Aldi stores generally employ between 40 - 50 staff. The company's remuneration and training policy reflects Aldi's firm belief that a well-trained and highly motivated workforce is essential to the success of the business. All hourly paid wages for store employees exceed the Government's National Living Wage and the Living Wage Foundation's recommended national rate. Aldi offers full training for all its positions and the schedule and facets of the training are tailored to the individual.

4.24 Aldi ensure that its foodstores have a positive impact on the local communities that they are located within as recruitment is focused locally. Job vacancies are advertised in nearby stores and in the local press alongside Aldi's website. This approach usually results in the majority of staff being recruited from the local area. In addition, it is not unusual for the retailer to work with the local Job Centre Plus when recruiting for a new foodstore so that residents of the local area are specifically targeted.

4.25 It should be noted that part-time staff are placed on a 15, 20 or 25 hour contracts at above industry average pay. As such, many part-time positions at Aldi would actually be viewed as full-time positions in other industries, including the retail sector.

4.26 Aldi has two of the most successful apprentice schemes and graduate programmes in the UK. Apprentices are trained to work in all parts of the business including at store, distribution, logistics and management level, as well as progression through to the Store Management Team.

4.27 Aldi's on-going graduate scheme secures an annual intake for the Area Management Programme. Trainee Area Managers spend a year shadowing an Area Manager before they take on three to four stores of their own to manage. The training covers the entire spectrum of running a retail operation and is a UK-wide programme.

4.28 The construction of a new store requires the services of local building trade contractors which provides employment opportunities during the build out period. Usually, a range of skills such as ground works, steel, brick and block work and shop fitting are sourced locally, as well as cleaners and labourers.

4.29 Finally, during the construction of the foodstore, by working with their chosen contractor Aldi are often able to identify individuals that are seeking work placements and may be able to accommodate these during the project. Aldi typically identify candidates that will benefit the most from the opportunity, particularly those that are currently undertaking some form of construction related education and training, and those that are looking to re-enter the industry after a period of absence. Aldi works with its appointed supply chain to support work placements.

Aldi Foodstore Sustainability Features

4.30 The following table sets out a summary of the sustainability features that are incorporated into each new Aldi foodstore as standard:

Main themes	Sub Theme	Proposed Measures to be Incorporated into the Development
Minimise Energy Use	Improving Building Envelope	Improve building fabric performance by using materials with low U values.
		Reduce Air Permeability for the development.
	Reducing Energy Demand	Use of LED technology for internal / external lighting.
		Detailed Specification of energy saving fitting for refrigeration system.
	Allocation of Renewable Energy	Re-use of waste heat from refrigeration system to heat the retail area.
Sustainable Building Materials	Material Specification	Use of recycled and secondary aggregates where possible.
		Use of timber from sustainable sources, including the reuse of timber where possible, whilst procuring new timber from sustainable sources such as FSC and PEFC sources.
		Use of materials that where possible have a low embodied energy, including making firm commitments to procure materials from local sources where possible.
		Procuring materials will be done with consideration to manufacturers and suppliers with accredited EMS and ISO Standards.
Sustainable Transport and Accessibility		Cycle parking for the site would be provided in accordance with LPA cycle parking standards.
		One twin-headed Faster Charger for Electric Vehicles will be provided at all new stores with two dedicated parking bays. Ducting to a further four bays for potential future use.
Water Conservation and Management	Water Use within the Retail	A pulsed water meter would be proposed for the development to monitor water use.
		2/4 litres wc's in retail store.
	Minimising Flood Risk	Proposals would be put forward that would not add to the flood risk in the area. A number of SUDS and engineering solutions could be put forward for this purpose, subject to site specific conditions.

<table>
<tr><td rowspan="2">Waste Management</td><td rowspan="2">Construction Waste</td><td>Recycling would occur during the construction phase where waste would be segregated and split into recyclable components.</td></tr>
<tr><td>General waste would be disposed of responsibly and sent to licensed waste handling facilities.</td></tr>
<tr><td colspan="2" rowspan="5">Reduction of detrimental Environmental Effects</td><td>Hydrocarbon traps will be placed around the perimeter of the car park area where necessary.</td></tr>
<tr><td>The development does not include materials that are toxic to humans.</td></tr>
<tr><td>All insulation materials and refrigerants have an ODP value of 0 and a GWP of 5 or less.</td></tr>
<tr><td>Where necessary, land contamination would be remediated.</td></tr>
<tr><td>External lighting will be compliant to best practice guidelines from the Institute of Lighting.</td></tr>
<tr><td>Site Management</td><td>Commissioning and Handover</td><td>A building user guide and building education would be provided as part of the development’s handover.</td></tr>
</table>

Table 1: Sustainability Measures

Heat Recovery System (Re-Usable Energy)

4.31 Perhaps the most significant sustainability feature which is provided as standard on all new Aldi foodstores is their ‘heat recovery system’, which constitutes a ‘re-usable’ energy source. In order to minimise energy demand in stores, Aldi seek to re-use and re-cycle any waste energy where possible. The greatest area to recover energy in the store is the ‘waste heat’ generated by the refrigeration system and this is recovered to heat the building.

4.32 Aldi use a system to recover waste heat from the food refrigerator circuits which would otherwise be discharged into the atmosphere. The heat from the refrigerator would previously have been rejected when the refrigerant hot gasses are cooled in the condensers by external air. Previously a gas heating system was used to make up any shortfall in heating demand.

4.33 With the input and detailed design of a ‘refrigeration engineer’ and a ‘mechanical services engineer’, the waste heat is harnessed via a CO_2 refrigerant lead heat recovery system that rejects the waste heat into a low temperature hot water heating circuit which in turn provides heat to an underfloor heating array or a number of ceiling mounted convectors on the sales floor if the store is leasehold. <u>This system provides 100% of the total building heating demand</u>. The heat recovery system has totally removed the need for an independent gas heating system. The underfloor heating system provides heat to the store with a high percentage of radiant heat, minimising the negative affect that the sales floor chillers have on the store heating.

4.34 To demonstrate the effectiveness of this system, Aldi have used a typical model in Leicester which, being in the Midlands, represents the average for the whole of the UK. The typical energy demand for an Aldi Development in the Midlands is 271,624 kwh per year. The total energy demand for heating to an Aldi Store is 115,416 kwh. The refrigeration installation would generate 150,000 kwh which is more than sufficient to heat all the store.

4.35 With all the energy demand required to heat the building, being recovered from re-usable energy, 115,416 kwh of the total energy demand for the building of 271,624 kwh is generated from re-usable energy. This represents over 40% of the energy demand for the development being created by re-usable energy. Whilst it is acknowledged that this system is not technically a form of 'renewable energy', it results in the foodstore being exceptionally efficient in terms of the off-site energy requirements. This is a more environmentally friendly approach than an otherwise inefficient building that benefits from a limited on-site renewable energy source.

5. Planning Policy Context

5.1 This section provides a review of relevant planning policy and guidance at the national and local level in so far as it is material in assessing the merits of the site for the proposed development.

Intr oduction

5.2 Section 38(6) of the Planning and Compulsory Purchase Act 2004 requires than an application for planning permission should be determined in accordance with the Development Plan, unless material considerations indicate otherwise.

5.3 The planning policy that supports the proposal exists at a number of levels and extends to a range of guiding documents.

5.4 National guidance comprises Planning Policy Wales (PPW) (Edition 12, February 2024), as well as a range of supplementary Technical Advice Notes (TANs). At the local level, Caerphilly County Borough Council Local Development Plan (LDP) (2006-2021) (adopted ion 23rd November 2010) constitutes the statutory development plan against which the proposals will be assessed. Policies of relevance in terms of both the national and local context are set out below.

The Local Development Plan

5.5 The Planning and Compulsory Purchase Act 2004 introduced the requirement for all local planning authorities to produce a new form of development plan for their areas –a Local Development Plan. Accordingly, the Caerphilly County Brough Council Local Development Plan (LDP) 2006-2021 was adopted on 23rd November 2010 and comprises of a range of detailed objectives and policies against which all planning applications are considered.

5.6 The site lies within the defined settlement boundary of Nelson, which is allocated as a Local Centre, and it has no site specific policy designation, as shown on the LDP Proposals Map. The following policies of the LDP are applicable to the proposals for the demolition of the existing food store and the erection of a new foodstore:

Strategic Policies

5.7 **Policy SP2 (Development Strategy –Development in the Northern Connections Corridor)** states that development proposals in the Northern Connections Corridor will promote sustainable development that:

A) Focuses significant development on both brownfield and greenfield sites that have regard for the social and economic functions of the area;
B) Reduces car borne trips by promoting more sustainable modes of travel;
C) Makes the most efficient use of the existing infrastructure;
D) Protects the natural heritage from inappropriate forms of development; and
E) Capitalises on the economic opportunities offered by Oakdale/Penyfan Plateau.

5.8 **Policy SP4 (Settlement Strategy)** identifies a hierarchy of settlements: principal towns, local centres and residential settlements. It designates Caerphilly, Blackwood, Bargoed, Ystrad Mynach and Risca/Pontymister as principal town centres, supported by the four local centres comprising Nelson, Rhymney, Newbridge, and Bedwas. It is worth noting that the LDP does not define the local centre boundaries, primary retail area or separate primary or secondary shopping frontages for any of the local centres. The LDP does however seek to enhance these local centres based on their current role and function. It also recognises the importance of Nelson as an area for employment growth but also acknowledges the need for employment opportunities to be supported by appropriate housing.

5.9 **Policy SP5 (Settlement Boundaries)** lists four reasons for the definition of settlement boundaries within the Plan, which have been identified through the functional analysis of strategy areas and by the specific role and function of individual settlements:

A) Define the area within which development would normally be allowed, taking into account material planning considerations;
B) Promote the full and effective use of urban land and thus concentrate development within settlements;
C) Prevent the coalescence of settlements, ribbon development and fragmented development; and
D) Prevent inappropriate development in the countryside.

5.10 **Policy SP6 (Placemaking)** requires development proposals to contribute to the creation of sustainable places by having full regard to the context of the local, natural, historic and built environment and its special features. The policy lists 8 criteria which seek to ensure sustainable places are created:

A) An appropriate mix of uses that reflect the role and function of settlements;
B) A high standard of design that reinforces attractive qualities of local distinctiveness;
C) Design in accordance with best practice in terms of designing out crime;
D) A location and layout that reflects sustainable transport and accessibility principles and provides full, easy and safe access for all;
E) The incorporation of resource efficiency and passive solar gain through layout, materials, construction techniques, water conservation, and where appropriate the use of sustainable drainage systems;
F) The efficient use of land, including higher densities where development is close to key transport nodes;
G) The incorporation and enhancement of existing natural heritage features; and
H) The incorporation of mitigation measures that improve and maintain air quality.

5.11 **Policy SP7 (Planning Obligations)** states that the Council will seek to secure Planning Obligations states that the Council will seek to secure Planning Obligations (s106 Agreements) where they are necessary to remove obstacles to planned development, meet local needs and make development more sustainable.

5.12 **Policy SP10 (Conservation of Natural Heritage)** states that the Council will protect, conserve, enhance and manage the natural heritage of the County Borough in the consideration of all development proposals within both the rural and built environment. The supporting text to the policy confirms that landscapes are covered under the term ‘natural heritage’, which is a positive asset that enriches people’s quality of life.

5.13 **Policy SP21 (Parking Standards)** states that in order to implement the parking standards laid out in CSS Wales Parking Standards 2008, the Council will identify the following parking zones:

A) Town Centres;
B) Urban Areas;
C) Suburban Areas;
D) Countryside; and
E) Deep Rural.

5.14 **Policy TR3 (New Rail Stations)** - identifies that land will be safeguarded for the provision of a new rail station at Nelson as part of a potential reopening of the Cwmbargoed rail line between Ystrad Mynach and Bedlinog. This is currently identified in the Phase 2 programme of the South Wales Metro (2017-2023) and has the potential to improve access to sustainable transport in the medium term.

Countywide Policies

5.15 **Policy CW2 (Amenity)** indicates that development proposals must ensure that the proposal would not result in over-development of the site and/or its surroundings. Furthermore, the policy indicates that the proposed use would need to be compatible with the surrounding land uses and not constrain the development of neighbouring sites for their allocated use.

5.16 **Policy CW3 (Design Considerations: Highways)** states that development proposals must meet a number of highways requirements including that the new access roads are designed to an appropriate standard.

5.17 **Policy CW5 (Protection of the Water Environment)** states that development proposals will only be permitted where:

A) They do not have an unacceptable adverse impact upon the water environment, and
B) Where they would not pose an unacceptable risk to the quality of controlled waters (including groundwater and surface water)

5.18 **Policy CW6 (Trees, Woodland and Hedgerow Protection)** identifies criteria against which developments containing trees will be permitted, and states that development will only be permitted where development proposals have made all reasonable efforts to retain, protect and integrate trees within the development.

5.19 **Policy CW15 (General Locational Constraints)** highlights that development proposals will be considered in accordance with (amongst other matters), the role and function of the settlement within which they are located. Furthermore, development proposals will not be permitted if they prejudice the implementation of wider comprehensive redevelopment or constrain the development of any adjacent site for its allocated land-use.

5.20 **Policy CW16 (Locational Constraints –Retail)** stipulates that outside the defined principal town centres, proposals for new retail stores or for additional retail floorspace will only be permitted where:

A) The vitality and viability of nearby principal town Centres will not be undermined, taking into account the cumulative effects of other approved retail developments, recently completed developments and plan commitments, and;
B) The proposal would not undermine the Council's retail strategy, a Town Centre Action Plan or any regeneration plans that the Council has formally approved, or;
C) The proposal is:
    i. i) A new retailing unit of 1,000sqm or less in size, or the change of use of such a size, and;
    ii. ii) To serve neighbourhood needs or is ancillary to another commercial use.

Strategy Area 2: Northern Connections Corridor Policies

5.21 **CM1 (Principal Town Centre Boundaries)** defines the Town Centre Boundaries for the five Principal Towns, including two principal town centres within the Northern Connections Corridor, namely Blackwood and Ystrad Mynach. As they are the main shopping centres, retail policies have been formulated which aim at protecting and enhancing their retail vitality and viability. The main thrust of the retail strategy is to continue to expand overall retail provision in the County Borough through the growth of high-quality shopping centres which retain the best existing features combined with provision for new shopping investments and environmental enhancement. Therefore, policies seek to focus retail developments within existing shopping centres and defined edge of centre locations to accommodate specific types of stores. The supporting text to this policy states that although the principal town centre of Ystrad Mynach contains both a Tesco Superstore and a Lidl, it plays a greater role for office and health. Generally, the local centres are smaller in size and service the needs of the local communities.

5.22 **CM4 (Principal Town and Local Development)** identifies principal town and local centre sites which are allocated for retail, commercial leisure, and office developments.

Supplementary Planning Guidance (SPG)

5.23 The Council provides a range of Supplementary Planning Guidance (SPG) which comprises detailed guidance on the way in which policies of the LDP will be applied in particular circumstances or areas.

5.24 The following adopted SPG documents are considered to be relevant to the proposed development:

- LDP 4 –Trees and Development (January 2017)
- LDP 5 –Car Parking Standards (January 2017)
- LDP 5 –Car Parking Standards: Parking Zones (January 2017)
- LDP 6 –Building Better Places to Live (January 2017)
- Ystrad Mynach Masterplan (2019)

Community Infrastructure Levy (CIL)

5.25 In 2008 the Planning Act was amended to make provisions for local authorities to prepare a Community Infrastructure Levy (CIL) for their own areas (if so desired). This would take the form of a charging schedule that would subsume a lot of matters that are currently secured through the use of Section 106 Legal Agreements which are the usual method for obtaining infrastructure improvements to mitigate the impacts of development proposals. It should be noted that it is not the purpose of CIL to replace Section 106 obligations.

5.26 The Council's CIL Charging Schedule came into effect on 1st July 2014. A CIL charge of £100 per square metre (sqm) will be levied against retail development under the Schedule. A deduction would be made for the floorspace of any existing building on site, provided that it has been in use for at least 6 months in the last 3 years.

Emerging Development Plan

5.27 A statutory review of the Caerphilly Local Development Plan (LDP) started following a consultation in February/March 2020.

5.28 The Welsh Government has raised an objection to the proposed Replacement Local Development Plan (RLDP) and the process is currently on hold, subject to review. The council's delivery agreement originally anticipated adoption of the RLDP in December 2024. However, this will need to be revised and a new timescale agreed with the Welsh Government. Until the RLDP is adopted, the current adopted LDP will remain in place for all planning decisions.

National Planning Policy and Guidance

Planning Policy Wales

5.29 Planning Policy Wales (Edition 12, February 2024) (PPW) sets out the land use planning policies of the WG and is supplemented by a series of Technical Advice Notes (TANs). This contains guidance for the preparation of Local Authority development plans, development management, and sets out the WG commitment to creating sustainable developments.

5.30 The fundamental objective of PPW is to promote sustainable development and improve the social, economic, environmental and cultural well-being of Wales, as required by the Planning (Wales) Act 2015, the Well-being of Future Generations (Wales) Act 2015 and other key legislation. The commitment of the Welsh planning system to sustainable development is underpinned throughout the document. The 2012, 2014, 2016 and 2021 revisions of PPW saw an array of changes which were aimed at supporting a presumption in favour of sustainable development.

5.31 PPW outlines the importance of using previously developed land wherever possible in preference to greenfield sites. PPW 12 confirms that environmental components of places are intrinsically linked to the quality of the built and natural environment and contribute to the health and wellbeing of the people who live, work and play there.

5.32 Chapter 2 identifies 5 Key Principles for achieving the right development in the right place. These are as follows:

- Growing our economy in a sustainable manner;
- Making best use of resources;
- Facilitating accessible and healthy environments;
- Creating & sustaining communities, and
- Maximising environmental protection and limiting environmental impact.

5.33 In responding to the key principles for the planning system, PPW states that development proposals must seek to deliver development that addresses the following national sustainable placemaking outcomes.

- Creating and sustaining communities
- Making best use of resources
- Maximising environmental protection and limiting environmental impact
- Growing our economy in a sustainable manner
- Facilitating accessible and healthy environments

5.34 It is accepted that not every development will be able to demonstrate it can meet all of these outcomes.

5.35 PPW must be used to implement placemaking. To do so, proposals should be prepared within the context of the key planning principles of the planning system in order to meet the well-being goals.

5.36 PPW first requires development proposals to be assessed against the 'Strategic and Spatial Choices' (Chapter 3). Thereafter, an assessment must be made of the detailed impacts of the development proposal and its contribution to 'Active & Social Places' (Chapter 4), 'Productive & Enterprising Places' (Chapter 5) and 'Distinctive & Natural Places' (Chapter 6).

5.37 The results of the assessment should promote well-being goals and sustainable placemaking outcomes, by ensuring the proposals contribute to sustaining or creating sustainable places and delivering the national sustainable placemaking outcomes identified above.

5.38 The Welsh Government, in paragraph 4.3.3 of PPW12, identifies a number of overarching objectives for retail and commercial centres which planning authorities should deliver through their development management decisions ensuring their maximum contribution to the well-being goals. The planning system must:

- promote viable urban and rural retail and commercial centres as the most sustainable locations to live, work, shop, socialise and conduct business;
- sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
- improve access to, and within, retail and commercial centres by all modes of transport, prioritising walking, cycling and public transport.

5.39 The Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. In implementing this policy, planning authorities should adopt a sequential approach when determining planning applications for retail and other complementary uses. By adopting a sequential approach first preference should be to locate new development within a retail and commercial centre defined in the development plan.

5.40 PPW 12 stipulates that edge-of-centre or out-of-centre sites should be accessible by a choice of public and private modes of travel. New out-of-centre retail developments or extensions to existing out-of-centre developments should not be of a scale, type, or location likely to undermine the vibrancy, attractiveness and viability of those retail and commercial centres that would otherwise serve the community and should not be allowed if they would be likely to put the development plan retail strategy at risk.

5.41 PPW stipulates that all retail planning applications or retail site allocations of 2,500 sq. metres or more gross floorspace that are proposed on the edge of or outside designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment. Requests for retail impact assessments by planning authorities on smaller developments should be proportionate to potential impacts.

5.42 PPW 12, Chapter 6, refers to the requirement for planning applications to be accompanied by a Green Infrastructure Statement (GI). The GI statement must be used to demonstrate how the stepwise approach has been applied to achieve Net Benefit to Biodiversity. The GI should be proportionate to the scale and nature of the development. Development proposals should be informed by the priorities identified in GI assessments and locally based planning guidance.

Technical Advice Notes (TANs)

5.43 As set out above, PPW is supplemented by a series of Technical Advice Notes (TANs). TAN 4 (Retail and Commercial Development) is of particular relevance to the proposals and was updated in November 2016 to bring it in line with PPW. This revised document replaces TAN 4 (Retailing and Town Centres), which was adopted in November 1996.

5.44 The Welsh Government's objectives for retail and commercial centres are to:

- Promote viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business.
- Sustain and enhance retail and commercial centres vibrancy, viability and attractiveness.

Improving access to, and within, retail and commercial centres by all modes of transport, especially walking, cycling and public transport.

5.45 PPW recognises that retail and commercial centres are the focal point for shopping, leisure and tourism, local services and business/employment opportunities. This 'town centres first' approach ensures, through policy and decision making, that retail and commercial centres should be the first choice location in assessing the most appropriate places for a wide variety of developments. The co-location of these uses and their high levels of accessibility by a range of transport options make them sustainable locations.

5.46 TAN4 stipulates that the sequential location of development plan allocations or planning application should be considered in the following order:

Firstly, within retail and commercial centres.
If no suitable sites are available in retail and commercial centres then edge-of centre locations should be considered, with preference given to brownfield sites that are well connected to the existing centre and accessible by a variety of means of transport.
Only when retail and commercial centres and edge of centre locations have been considered and found to be unsuitable can out-of-centre options within, and outside, a settlement are to be considered. Preference to brownfield out-of-centre sites should be given, which are or will be served by a choice of means of transport and are close to established retail and commercial centre.

5.47 With regard to suitability, where a developer favours a development on the edge or outside a retail centre, evidence will need to be provided to explain why potential sites or buildings within the centre are unable to accommodate the format, scale and design of a proposed development. Retailers should be flexible an innovative about the format, design and scale of the proposed development and the amount of car parking needed.

5.48 TAN4 requires retail development over 2,500 sqm gross floorspace to be supported by an impact assessment, although smaller retail planning application may also be assessed where local planning authorities believe it will have a significant impact on a retail or commercial centre.

5.49 In addition to the need and sequential tests, TAN4 stipulates that planning applications for retail development outside a retail centre that are not in accordance with the development plan should be assessed against a range of impact criteria, including:

Impact of the proposal on existing, committed and planned public and private investment in a centre or centre in the catchment area.
Impact of the proposal on centre vitality and viability, including local consumer choice and range and quality of the comparison and convenience retail offer.
Consideration of the cumulative effects of the development proposal in relation to any outstanding planning permissions.
The impact of the proposal on allocated sites outside centres being developed in accordance with the development plan.
Impact of the proposal on in centre trade and turnover in the centre and other centres in the wider area, taking account of current and future consumer expenditure capacity in the catchment area.
Assessment of the proportion of customers using the development travelling by different modes of transport.
Impact on travel patterns over the catchment area.
Any significant environmental impacts.

5.50 In addition to TAN 4, the following TANs are also applicable to the proposals:

Technical Advice Note 5 (Nature Conservation and Planning) was published in 2009 and is to supplement the information provided in PPW. This provides advice for local planning authorities on the key principles of positive planning for nature conservation; nature conservation and Local Development Plans; nature conservation in development management procedures; development affecting protected internationally and nationally designated sites and habitats; and development affecting protected and priority habitats and species.

Technical Advice Note 12 (Design) was updated in March 2016 and provides detailed advice on how good design in development may be facilitated by the planning system. The guidance states that good design has the potential to assist in environmental sustainability, economic growth and social inclusion. The guidance places particular emphasis on the achievement of sustainable design solutions, sustaining or enhancing character, promoting innovative design solutions, ensuring access for all and promoting legible development.

Technical Advice Note 15 (Flood Risk) was published in July 2004 and advises on development and flood risk together with its impact on sustainability principles. It also provides a framework to assess fluvial and tidal flooding, and run-off from development. The overriding aim of the guidance seeks to locate new developments away from areas identified at high risk of flooding. The coming into force of the new TAN 15 and Flood Map for Planning on 1st December 2021 has been suspended until further notice.

Technical Advice Note 18 (Transport) was published in March 2007 and recognises the key role of the planning system to facilitate sustainable travel patterns. As in TAN 12, the guidance aims to influence the location of new development to reduce the need to travel and subsequently promote more sustainable forms of transport which contribute to environmental improvement in the longer term.

Technical Advice Note 20 (Planning and the Welsh Language) was published in October 2017. This provides guidance on how the planning system considers implications of the Welsh language.

Technical Advice Note 23 (Economic Development) was published in February 2014 and focuses on the need to encourage development in order to generate wealth, jobs and income. This TAN recognises the importance of all aspects of development and that planning decisions are made in a sustainable way which balance social, environmental and economic considerations.

6. Planning Considerations

Preface

6.1 The application proposals are compliant with policy provisions at the national and local level and the way this can be achieved is demonstrated by the detail submitted in the application package. This identifies the key development influences that have been taken into account when designing the proposals for the site.

6.2 This assessment demonstrates that the proposals accord with the detailed LDP policy requirements identified in Section 5. These include matters of design, transportation, ecology, landscape and tree, energy, noise, drainage and flood risk, Welsh language, and socio-economic benefits.

6.3 As required by Section 38 (6) of the Planning and Compulsory Purchase Act 2004, the application proposals have been assessed against all relevant national and development plan policies and other material considerations and have been found to be in compliance.

6.4 In this context, we believe the primary issues in this instance to be:

- The Principle of Development;
- Character and Appearance;
- Highway Safety;
- Ecology;
- Arboriculture;
- Energy;
- Landscaping;
- Noise;
- Drainage and Flood Risk;
- Impact upon the Welsh Language, and
- Socio-Economic Benefits.

Principle of Development

6.5 The application site is within the settlement boundary of Nelson, as defined under Policy SP5 of the adopted LDP, and forms part of the Northern Connections Corridor (NCC), as defined by Policy SP2. The NCC comprises a contiguous area of urban development spanning the mid valleys area. The LDP targets new employment growth within the NCC.

6.6 The NCC has a settlement pattern that is more like a conventional urban conurbation rather than the traditional linear settlements typical of the valleys. The NCC has been successful in attracting substantial public and private investment that has succeeded in transforming this part of the County Borough.

6.7 The application site is located within the provisions for the Ystrad Mynach masterplan (figure 5 showing the site). The strategy does not promote the provision of major retail development outside of designated retail areas, but the development of smaller retail units to support local needs is a key part of promoting sustainable development, and it is identified that Nelson has potential to expand the retail offer. The masterplan identifies Nelson as a key settlement and has a status as a local centre within the masterplan. Nelson is also identified as having a significant regional development opportunity with considerable potential economic and social benefits as well as redevelopment opportunity.

6.8 There is clearly support for the regeneration of the site, including an element of retail. The proposal provides the opportunity to replace an old outdated retail foodstore with a modern discount foodstore bringing with it economic benefits, including significant job creation, a sustainable drainage scheme, and ultimately contribute to the area's regeneration.

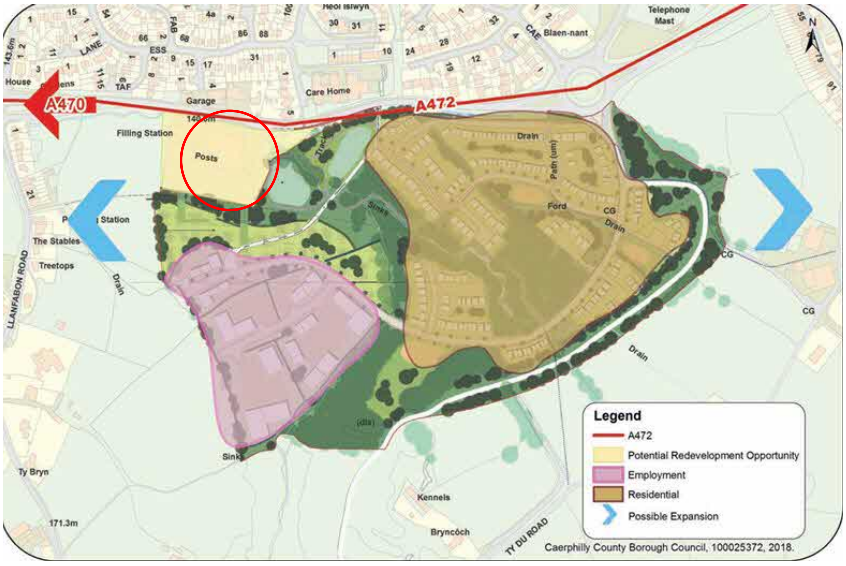

Figure 3 - Site designations. Site circled in red.

6.9 The default national threshold for undertaking a retail impact assessment is 2,500 sqm gross. The proposed Aldi foodstore would not exceed this figure and CCBC does not appear to have a lower locally set threshold in adopted policy.

6.10 On the basis that the proposed food store will comprise a lower quantum of retail floorspace than the national threshold of 2,500 sqm, and there is no adopted development plan local threshold, a retail impact assessment would not ordinarily be required. Nevertheless, this statement has been prepared to deal with the relevant retail policy tests at the local and national level.

6.11 The following sections of this assessment will, therefore, consider the matters of retail impact, need, and the sequential test. The scope of this assessment was agreed with the Council during the pre-application process.

6.12 The impact analysis is set out within Section 9 of this statement. In summary, it is clear that the proposed discount foodstore will not give rise to any significant adverse impacts upon the vitality and viability of any surrounding centre and no conflict is therefore anticipated with Paragraphs 4.3.26 and 4.3.27 of PPW and TAN4.

6.13 The retail capacity assessment is set out within Section 7 and concludes that these is a demonstrable need for the proposed development and there is no conflict with PPW guidance in this regard.

6.14 A sequential assessment has been undertaken to demonstrate that the application site is the most sequentially preferable site. As set out in Section 8 of this statement, it is considered that there are no sequentially preferable sites within a realistic catchment area for the scale and form of development proposed and compliance can therefore be demonstrated with the sequential approach to site selection as set out in Paragraphs 4.3.18 to 4.3.24 of Planning Policy Wales.

6.15 The proposals pass the sequential test, need and impact test and thus complies with national and local planning policies and guidance. As such, we consider the principle of the proposed development to be acceptable.

6.16 This assessment demonstrates how the development proposals have regard to other applicable material considerations including character and appearance, highway safety matters, ecology, arboriculture, energy, noise, drainage and flood risk, the Welsh language, as well as socio-economic benefits, and these are discussed in turn below.

Character and Appearance

6.17 The site currently accommodates a Co-op retail foodstore with a gross external floor area of 1,550 sqm, served by an extensive area of car parking and vehicular access from Mafon Road. The immediate context is mixed with a petrol garage, retail, industrial and residential to the north and east.

6.18 From a visual perspective, the proposed regeneration of this previously developed (brownfield) site would be beneficial to the surrounding area. The proposal presents the opportunity to fully utilise a highly sustainable site within an existing urban area and breathe new life into the community, help to generate investment and jobs within the local area.

6.19 The proposed foodstore will be of a modern design with a mono-pitch roof set, sited along the application site's southern boundary and set back from Mafon Road (A472), orientated with the store entrance facing north into the centre of the site, whilst the service area and delivery bay is located to the western side of the building. Given the separation distance to the nearest residential properties, there will be no detrimental impact upon any nearby properties in terms of noise, amenity or privacy.

6.20 The application is supported by a Soft Landscaping Scheme which provides details of the proposed landscape enhancements proposed for the site, including the addition of native trees within the soft landscaping. This would benefit wildlife and represents a net gain in biodiversity for the site.

6.21 The proposals will, therefore, result in betterment to the visual appearance of the site and surrounding area. This is in accordance with PPW and LDP Policy SP6.

Highway Safety

6.22 The site access is from Mafon Road (A472) which is subject to a 20mph speed limit. It has comprehensive footways along its northern flank and footways to the east along its southern flank, bus stops and a rage of pedestrian crossing facilities.

6.23 In terms of walking, the site is very accessible from the surrounding residential areas. There is a good network of footpaths and footways adjacent to and surrounding the site. Crossing points (controlled and un-controlled) are provided to allow for safe site access.

6.24 The Transport Assessment submitted in support of the planning application details the potential for improvements to walking and cycling infrastructure, in the scope of the Active Travel Act, to help ensure optimal conditions for walking and cycling, to reduce reliance and use of the private car, and to ensure there are no major obstacles to customers or staff walking or cycling to and from the site.

6.25 On entry to the car park there will be a footpath extending south from Mafon Road to the store entrance. The width will be approximately 2m. This accords with guidance outlined in Active Travel Wales.

6.26 It is evident within the Transport Assessment that opportunities exist to travel to and from the site by foot, bike (National Cycle Network), and by local public transport. The site is well located to encourage sustainable modes of travel and to reduce reliance on the private car. Therefore, the opportunities to travel by sustainable modes of transport demonstrates that the proposal is compliant with local and national transport planning policy.

6.27 The proposed development would not lead to any significant or severe impacts on the junctions of the local highway network, which would remain within capacities for both the opening and future year horizons.

6.28 The proposed parking is commensurate with the needs and expected operation of the development proposal, to avoid overspill onto local roads but to avoid over-provision for the private car. The number of parking spaces is in line with local standards and is based on extensive local experience at other Aldi stores and is similar to existing stores that have either been built, are being built, have planning or in planning with no objection from highways development control. Secure cycle parking spaces for the discount food store would be provided in excess of the required standards together with safe access for pedestrians.

6.29 Servicing would be consistent with Aldi's tried and tested approach and with local policy in mind; the site access provides safe and efficient access for the turning of service vehicles and will tie into the identified highway access improvements. Tracking has been undertaken to confirm access by an articulated HGV to and from the servicing area in a forward gear.

6.30 The Transport Assessment concludes that the development proposals are not expected to lead to any localised material off-site highways issues on the adjacent transportation network. If is therefore concluded that the impact has been fairly and reasonably addressed and there should be no reason for a highways related objection to the proposed development as it complies with LDP Policies SP21 and CW3, and SPG LDP5.

6.31 A Travel Plan has also been prepared by Entran Ltd and has appointed a Travel Plan Co-ordinator. The Travel Plan highlights that given the changing characteristics of the development over time it would be ineffective for the Travel Plan to specify measures or funding measures that may be required to encourage sustainable travel. However, the Travel Plan will continue to be monitored and reviewed in partnership with the local authority to help identify key motivators for people's travel choices. This Travel Plan will be highlighted to staff at the interview stage.

Ecology

6.32 The application is supported by an Ecological Impact Assessment (Document Reference 13571_R01a_VKC) prepared by Tyler Grange to establish any habitats and features with potential to support protected and/or notable conservation priority species.

6.33 An initial 'extended' phase 1 habitat survey and preliminary bat roost assessment were undertaken on 21st November 2023.

6.34 The site comprises one building, hardstanding, areas of introduced shrub, modified grassland, bramble scrub and ruderal vegetation, as well as broadleaved woodland and scattered broadleaved trees.

6.35 The building within the site was assessed as having low suitability to support roosting bats and is there recommended to undergo one further bat emergence survey, during the bat survey season (May to August, inclusive) to determine the presence or likely absence of roosting bats.

6.36 Habitats within the site support nesting birds and therefore an Ecological Clerk of Works (ECoW) will be required should these habitats be lost during the bird nesting season.

6.37 As the site contains habitats that could support a small number of amphibians, badgers, hedgehogs and reptiles, as well as commuting otters, basic mitigation measures will be adhered to during the construction and operational phases of the development.

6.38 With the implementation and enhancement strategy described in the Ecology Impact Assessment, it is considered that the proposed development would be in conformity with relevant policy and legislation, including PPW, LDP Policies SP10, CW5, CW6, and SPG LDP4

Arboriculture

6.39 An Arboricultural Impact Assessment (AIA) (Document Reference: 13571_R02a_21st February_MB/JP) has been undertaken by Tyler Grange and is submitted in support of the planning application.

6.40 The tree survey was completed by a suitably qualified Arboricultural Surveyor of Tyler Grange in November 2023. The survey was completed in accordance with BS5837. A measured topographical survey was used to identify the location of trees and their surrounding context.

6.41 Findings for each of the trees surveyed are detailed in the Tree Survey Schedule (see Appendix 3 of the AIA). This provides a tabulated record of the trees surveyed, including reference numbers, species composition, tree dimensions, life stage, physiological and structural condition, and the arboricultural value of each survey entry.

6.42 The distribution of the trees surveyed is illustrated on the Tree Constraints Plan (TCP) together with details of their constraints to new development in accordance with BS5837, including tree quality gradings, Root Protection Areas (RPAs), and tree canopy spreads.

6.43 The trees to be retained are shown on the Tree Retention Plan (TRP) and the report describes the works required to facilitate the proposed development.

6.44 There will be a requirement to prune trees T2 (English Oak) and T3 (English Oak). Tree T2 will require crown lifting pruning on its northeastern side to provide a 2.5m height clearance for car parking spaces. Tree T3 will require crown lifting on its eastern side to provide 4.5m hight clearance for HGV turning area. The pruning works are not considered detrimental to the trees which have a current crown clearance of 2m and 3m respectively. No trees will be lost, however, a soft landscaping has been prepared and shows the addition of 12 new trees across the site and within the new street scene.

6.45 The protection of the retained trees during the construction stage will require a detailed Arboricultural Method Statement (AMS). This report provides recommendations for protection to demonstrate how this can be achieved. An AMS is therefore recommended to be secured by planning condition should planning permission be granted.

6.46 In summary, the proposed development requires the pruning of 2 No. English Oak trees (Category B2) which are trees of moderate quality and value. These trees will be retained and will be pruned to facilitate the development. The impact is therefore considered negligible from an arboricultural perspective, subject to the adoption of tree protection measures during construction stage. The proposed development is therefore considered consistent with PPW, LDP Policy CW6 and SPG LDP4.

Energy

6.47 A Renewable and Low Carbon Energy Statement (Document Reference: SOL_24_S031_AL-CA) has been undertaken by Sol Environment and is submitted in support of the planning application. This has been formulated to provide a sustainable energy solution for the proposed development in accordance with the requirements of the Caerphilly County Borough Council's Local Development Plan up to 2021 (adopted 2021), with specific reference to Policy SP6 (Place Making).

6.48 The conclusion of the energy strategy is that based on planning stage calculations, the development achieves a significant reduction in CO2 emissions compared to a 2021 Building Regulations Part L compliant development. The CO2 emissions reduction is accounted for by the specification of a well-insulated and airtight building fabric, high efficiency M&E systems, an Air Source Heat Pump supplemented by a 'Freeheat' Refrigeration Heat Recovery System, and a roof-mounted 80kWp Solar PV array, hence meeting the requirement of LDP Policy SP6 to incorporate resource efficient and passive solar gain through, for example, the layout, materials and construction technique.

Noise

6.49 An Environmental Noise Assessment (Document Reference: R1(final)-16.02.24-Aldi Nelson Caerphilly 2322180-KJM) has been undertaken by Sharps Redmore and is submitted in support of the planning application.

6.50 The refrigeration plant compound is to be located on the south side of the store to the rear of the delivery loading bay. From a noise point of view this is the optimum location for the plant compound which will afford good distance separation to nearby receptors. Given the very low background noise levels in the vicinity of the site (in the absence of noise from the Co-op plant equipment) ,it is proposed to adopt plant rating noise level limits of 41 dB daytime and 30 dB at night. The following planning condition is recommended to secure this criteria:

> *"No fixed plant and/or machinery shall come into operation until details of the fixed plant and machinery serving the development hereby permitted, and any mitigation measures to achieve this condition, are submitted to and approved in writing by the local planning authority. The rating level of the sound emitted from the site shall not exceed 41 dBA between 0700 and 2300 hours, and 30 dBA at all other times. The sound levels shall be determined by measurement or calculation at the nearest noise sensitive premises. The measurements and assessment shall be made according to BS 4142:2014+A1:2019."*

6.51 In summary, based on a thorough assessment against objective standards, it is concluded that the proposed foodstore could trade on an unrestricted basis without giving rise to significant adverse impacts. There is no requirement, on noise impacts grounds, for the local planning authority to seek to restrict store's trading or delivery hours. The store would be able to operate under unrestricted hours and remain compliant with PPW and LDP Policy CW2.

Landscaping

6.52 A Soft Landscaping Proposals Plan (Drawing Ref. 13571_P04) has been prepared by Tyler Grange and submitted in support of this application. This sets out the proposed soft landscaping for the proposed development. This is also set out in the Design and Access Statement.

6.53 In addition to this, a schedule of Hard Landscaping Materials (Drawing Ref. 200413-1701 Rev P02), a Proposed Boundary Treatment Plan (Drawing Ref. 200413-1703 Rev P02), and a Proposed Street Furniture Plan (Drawing Ref. 200413-1702 Rev P02) have been prepared by Kendall Kingscott Architects and submitted in support of this application.

6.54 The proposals will result in betterment to the visual appearance of the site and surrounding area. This is in accordance with PPW and LDP Policy SP6. Additionally, the proposed street furniture and boundary treatment will ensure compliance with LDP Policy CW3.

Drainage and Flood Risk

6.55 The drainage, water resources and utilities required by the proposed development have been considered as part of the preparation of this planning application.

6.56 Following the implementation of Schedule 3 of the Flood Water Management Act 2010 in Wales, developments with a construction area greater than 100m² are required to incorporate Sustainable Drainage Systems (SuDS). All such systems are required to be approved by the SuDS Approval Body (SAB) under an approval application and required to be adopted by the SAB where they serve more than a single property. As such, the surface water drainage for the proposed site will be developed and approved under SAB applications separate to the planning process.

6.57 Infiltration of surface water generated by the development is not expected to be viable due to potential near-surface contamination. It is therefore proposed to discharge all surface water run-off from the site into the watercourse that passes through the site via a new outfall immediately upstream of its inlet, with a flow control device to mimic equivalent greenfield rates.

6.58 Surface water generated by the proposed development will be discharged to the culverted watercourse which runs beneath the car park, with appropriately sized attenuation to prevent flooding on site and minimise the impact on other sites downstream. This will discharge by gravity for as much of the site as possible, however it is anticipated that pumping may be required for the lowest parts of the site including the HGV delivery ramp. The system will be designed to have enough attenuation storage capacity to prevent flooding for all storm durations up to and including the 1 in 30-year return period event, plus a 40% increase in rainfall intensity as allowance for climate change. MicroDrainage System 1 software will be used to size the pipes and MicroDrainage Simulation and Source Control software will be used to model the integrated below ground drainage system.

6.59 The drainage system will also be checked for the 1 in 100-year return period events plus 40%. Any surface water flooding will be retained on the site during these storm events, via ponding in low points in car park areas. Any ponding will not affect the proposed building or access/egress routes. In the event of drainage system failure or exceedance (beyond 1 in 100-year events), flow routes will be away from the proposed and existing buildings which will not be affected. Please refer to the Overland Flow Routes (Drawing reference: SK0005 Rev A) prepared by Craddys in support of the application.

6.60 The surface water drainage systems for the proposed foodstore will not be offered for adoption to the SAB.

6.61 The foul drainage generated by the proposed development will discharge to the existing public sewer which runs along Mafon Road, similar to the existing arrangement. The invert of the foul sewer is approximately 3 metres below the proposed FFL of the new store, however, the potential route for discharge via gravity to this destination is obstructed by the culvert. It is therefore proposed that the foul drainage for the site will discharge via a new private pump station with the rising main passing over the culvert and terminating at a ventilated break chamber immediately upstream of the connection to the public sewer. The foul drainage proposals are included on the Preliminary Proposed Drainage Layout Plan (Drawing Reference: SK0004 Rev A) submitted in support of the application. A Section 106 direct sewer connection application for the new store will need to be completed and agreed with Dwr Cymru / Welsh Water prior to construction.

6.62 The site is located within Flood Risk Zone A which is considered to be at little or no risk of fluvial or tidal/coastal flooding, as defined by the Development Advice Map contained within Technical Advice Note 15: Development and Flood Risk (2004). As such, the justification test is not applicable and there is no need to consider flood risk further. Under the emerging revised TAN15, which is yet to come into effect, the site is not considered to be at flood risk from rivers or the sea but is considered to be at risk from surface water flooding according to the Flood Map for Planning. However, this will be mitigated by the presence and continued maintenance of the new trash screen at the upstream end of the culvert which runs through the site. Run-off from the site to the watercourse will be controlled by means of a flow control and appropriately sized attenuation. In the event that any residual surface water flooding does occur it will affect the car park only and will not encroach on the building.

6.63 In summary, the Flood Consequence Assessment and Drainage Strategy submitted in support of the application concludes that the proposed development is deemed acceptable in this location and meets the requirements of PPW, TAN15, and LDP Policy CW5.

Impact Upon the Welsh Language

6.64 TAN 20 (Planning and the Welsh Language) seeks to safeguard and promote the interests of the Welsh language through development proposals and states that:

> "*In determining individual planning applications and appeals where the needs and interests of the Welsh language may be a material consideration decisions must, as with all other planning applications, be based on planning grounds only and be reasonable.*" *(Paragraph 4.1.2, Page 14, TAN 20).*

6.65 In accordance with this policy context, the impact of the proposal on linguistic character of the surrounding area is a material consideration. The development proposal will provide a new foodstore to contribute to the existing offer in the immediate area and to support the other uses within the area. The employees and customer base generated will contribute to the prosperity of the area as a whole. The provision of job opportunities will provide further opportunities for Welsh speakers to remain in the area. As such, the proposal will not have a detrimental impact upon the needs and intensity of the Welsh language.

Socio-Economic Benefits

6.66 The proposed development will deliver significant benefits to the area, not just in terms of visual betterment, but in terms of economic development and community benefits. Further details about job creation and training are provided in Section 4.

6.67 Obstructing developments such as these is clearly not the intention of the Welsh Government or the Council through PPW or the LDP.

6.68 Local residents will benefit from having close access to a low-cost supermarket. Access to high quality, affordable food items, is therefore an important qualitative consideration in support of the proposals.

6.69 It is also important to consider the economic benefits that the development of the site will have at the construction stage and during the operation of the proposed use. Such matters are supported by Technical Advice Note 23 (Economic Development). The construction phase will generate jobs and inject expenditure into the local economy, also providing subsidiary income for other businesses (i.e. suppliers, professional services, etc.).

Conclusion on Planning Considerations

6.70 In light of the above, it is considered that the proposal is acceptable and on balance, taking account of the material considerations and evidence provided in support of the planning application, the proposal complies with the objectives of the development plan.

7. Retail Need/ Capacity

7.1 As outlined at Section 5, Paragraph 4.3.14 of PPW requires planning authorities to consider if there is a need for additional retail provision when determining planning applications for retail land uses. Paragraph 4.3.15 clarifies that *"Need may be quantitative, to address a quantifiable unmet demand for the provision concerned, or qualitative."* It continues that precedence should be given to quantitative need particularly for development plan allocations. Paragraph 4.3.16 then sets out the range of considerations for qualitative need, which comprise amongst others, where a proposal:

> *"Supports the objectives and retail strategy of an adopted development plan or the policies in this guidance;*
> *is highly accessible;*
> *contributes to a substantial reduction in car journeys;*
> *contributes to the co-location of facilities;*
> *assists in the alleviation of over-trading;*
> *addresses locally defined deficiencies in provision in terms of quality and quantity;*
> *alleviates a lack of convenience goods provision in a disadvantaged area."*

7.2 We consider both are relevant in the context of these development proposals, with this section of the report considering them in more detail.

7.3 The last retail study undertaken for the Council area was the Retail Capacity Study (ref PS17; dated October 2022) which is Background Evidence to support the 2nd Replacement Caerphilly County Borough Local Development Plan, up to 2035. This study forms part of our analysis, which comprises a retail capacity and impact assessment following a standard and recognised step-by-step methodology, with the full tables enclosed in **Appendix 3.**

7.4 The capacity assessment focuses on convenience retail floorspace within the proposed foodstore, given this represents the majority of retail floorspace proposed. The amount of comparison goods floorspace proposed within the foodstore is small and ancillary to the main convenience role of the Aldi store.

Assessment of Quantitative Need

Study Area and Primary Catchment for Proposals

7.5 The study area used within the 2022 Council Study comprised six zones. Zones 2, 4, and 5 align within Caerphilly County Borough Council's administrative boundary to the east, while zones 1, 3 and 6 extend into neighbouring local authority areas to the north and west. The Council study sampled a wider area to understand levels of inflow expenditure into the administrative area and the role of CCBC's centres within the sub-region.

7.6 The Study Area for the Council's household survey is enclosed at **Appendix 1**. We use the findings of that household survey in our retail impact assessment included within Section 9.

7.7 Discount foodstores of Aldi's scale within urban areas such as Nelson tend to draw the majority of their trade from within an adjusted 7-minute off-peak drive-time catchment area. This represents their 'Primary Catchment Area'.

7.8 In seeking to find shopping pattern data which is broadly reflective of this anticipated seven-minute drive-time catchment area, we have had regard to the advice contained within the Planning Practice Guidance produced by the English Government which states that: "the impact test will need to be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible" (Town Centres and Retail, Paragraph: 017, Reference ID: 2b-017-20190722). Existing information in this case takes the form of the Council retail study.

7.9 Considering this primary catchment, it is clear that it will draw from Zone 3 of the Council retail study. We have therefore focused on this zone specifically within our assessment.

Table 1a –Turnover of Proposed Development

7.10 Table 1 of **Appendix 3** (RIA) estimates the convenience and comparison goods turnover of the proposal The Aldi store will have a total net sales area of 1,356 sqm. Of this sales area the vast majority will be given over to the sale of convenience goods (80% / 1,085 sqm), with the remainder used for the sale of a purely ancillary range of non-food (comparison) goods (20% / 271 sqm). The foodstore's convenience / comparison goods floorspace split has been provided by Aldi and the retailer would be willing to accept a planning condition limiting trading floorspace to the percentages tested.

7.11 However, as the proposals seek to replace an existing convenience food retail shop (Co-op), it is necessary to acknowledge the existing retail floorspace on the site and its associated turnover for retail impact purposes. The Council's retail capacity study sets out that the existing Co-op store comprises 723sqm net retail floorspace, of which 90% (651 sqm) is used for the sale of convenience goods, with the remainder (72sqm) used for comparison goods. The proposed Aldi store therefore represents a modest increase in retail floorspace uplift of 434sqm (convenience) and 199sqm (comparison).

7.12 A 2020 price year has been adopted to align with the Council's Retail Capacity Study (October 2022).

7.13 A sales density of £11,028 per square metre (2020 Prices) has been applied to the convenience goods floorspace of 1,085 sqm and grown to 2024, the base year, providing a convenience goods turnover of £11.96m. This is anticipated to increase by a small degree by the test year of 2027 (£12m) (Source: Experian Retail Planner Briefing Note 20 (February 2023). This sales density is drawn directly from Global Data 2021.

7.14 In terms of comparison goods foodstore, a sales density of £7,487 per square metre has been applied to the comparison floorspace proposed by Aldi of 271sqm and grown to the base year, to provide an uplift in comparison goods turnover of £2.03m in 2024 (increasing to £2.15m in 2027).

7.15 Finally, it should be noted that for both the convenience and comparison goods elements of the proposals, sales densities have been projected forwards using Experian's latest floorspace efficiency growth assumptions from Figures 4a and 4b (Page 16) of the Experian Retail Planner Briefing Note 20 (February 2023). This briefing note has been prepared following the height of the Covid-19 pandemic and therefore takes into account the latest economic implications for sales densities over the period to our test year of 2027.

Population (Table 2a)

7.16 The base population (2024) within the Study area has been sourced directly from up-to-date Experian Location Analyst data (January 2024 Report). The baseline population has then been projected forward to the test year of 2027 in line with Experian's growth forecasts (utilising the Jan 2024 data report).

7.17 On this basis, the defined Retail Capacity Study area is identified to contain a resident population of approximately 205,135 people in 2024, which is set to increase slightly to 205,561 people by the test year of 2027. This table then shows the individual population projections for each Zone identified earlier, with Zone 3 (representing the Primary Catchment Area), increasing from 22,045 in 2024 to 22,129 in 2027.

Per Capita Expenditure Assumptions (Tables 2b + c)

7.18 Per capita convenience base expenditure data for our catchment area has been sourced from up-to-date catchment specific Experian Location Analyst data (January 2024 Report). Our analysis of convenience goods (Table 2b) expenditure capacity then draws upon 'forecast' growth rates as set out under Figure 6, Appendix 3, of the Experian Retail Planner Briefing Note 20 (February 2023).

7.19 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 Figure 5, Appendix 3, Page 20, of Experian's Retail Planner Briefing Note 20, February 2023 (the latest available). 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 2d)

7.20 Table 2d of **Appendix 3** combine population and per capita expenditure estimates to establish total available convenience expenditure respectively within the Study Area. Table 2d shows that there will be approximately £434.82m convenience goods expenditure within the Retail Capacity Study Area at our test year in 2027. For Zone 3 this figure would be £47.02m at the same test year.

Convenience Goods Shopping Patterns (Table 3)

7.21 Table 3 of **Appendix 3** uses the NEMS household survey data (April 2022) which informed the Council's Retail Capacity Study (October 2022) to reveal shopping patterns across the area. The NEMS survey data has been adjusted to remove 'Internet' and 'Don't know' responses. These market shares are divided across the 6 Zones.

Convenience Goods Shopping Patterns (£m) in 2024 and 2027 (Tables 4 and 5)

7.22 Tables 4 and 5 undertake the conventional process of applying the total convenience goods expenditure for each postcode sector in 2024 and 2027 against the percentages in Table 3 to derive related turnover levels for each convenience retail location.

Existing Expenditure Flows + Need (Table 8)

7.23 As has already been explained, the primary catchment for the proposed store comprises Zone 3 and is from where the vast majority of the development's trade will be drawn. Accordingly, this zone forms the main focus of our analysis, and our key observations on the convenience goods shopping patterns within these areas are as follows:

- Zone 3 retains only **31%** (£14.72m in 2027) of the convenience goods expenditure generated by population. Therefore a significant **69%** (£32.3m) leaks elsewhere. This includes to Zone 4 (£14.29m), Zone 5 (£7,27m) and beyond the study area (£8.32m) principally.
- Zone 3 receives a low level of inflow (**£7.4m**), which is reflective of the retail provision currently available.

7.24 This reveals both a significant quantitative and qualitative need for more convenience choice within these areas, where a significant number of people are choosing to leave Zone 3 to meet their convenience shopping needs.

7.25 In conclusion, it is clear that there is quantitative capacity within the catchment area to accommodate further floorspace as evident from the findings above. This is in addition to the qualitative need considerations, which are set out in more detail below.

Assessment of Qualitative Need

7.26 As noted earlier, PPW sets out a list of considerations that can be relevant as part of a qualitative assessment at paragraph 4.3.16. These will be considered in turn below.

Supports the objectives and retail strategy of an adopted development plan or the policies in this guidance

7.27 The application site is an established retail location within the Nelson Local Centre, its redevelopment will support the LDP's aspirations for the local centre to serve not only the Nelson area but adjoining villages in Merthyr County Borough such as Treharris, Trelewis and Quakers Yard.

7.28 Redevelopment of the application site will also support the ambitions of the masterplan for the adjacent Ty Du site, providing an enhanced retail offer adjacent to existing and proposed housing off Mafon Road in Nelson. Indeed, the masterplan anticipated the potential redevelopment of the Co-op store in this regard. Nevertheless, the identification of a need for some convenience provision within the area, borne out by the quantitative need assessment above, is clear.

7.29 Moreover, the LDP's strategy to support job creation, improved sustainability (through reduced travel) and regeneration of brownfield land would all be supported by these development proposals.

Site is highly accessible

7.30 The proposed site is an established retail location in Nelson, adjacent to existing residential areas and new residential development land to the east, with a substantial local population and the ability for visitors to walk to the proposed new store. The proposals include attractive routes to navigate through the site and offers cycle parking spaces to encourage travel through more sustainable means. Finally, it is notable that if visitors to the store do arrive by car, they will have options to charge vehicles via the EV bays.

Contributes to a substantial reduction in car journeys

7.31 As noted above, the site offers strong sustainability credentials given its location, the ease of access available by walking, cycling or public transport. The inclusion of EV charging bays will also support more environmentally friendly car journeys, with the car park ducted to allow for more to be installed as take up of the technology increases over time.

7.32 By diverting trade from more distant locations, capturing local expenditure that is currently leaking elsewhere, and providing a local store that the nearby community can walk to, will create an opportunity to reduce car journeys through these development proposals. It is therefore apparent that the proposals will also satisfy this criterion of PPW in terms of qualitative need considerations.

Contributes to the co-location of facilities

7.33 The proposals are located in an area with a substantial walk-in residential population ensuring the local community can easily access the store, in a location where substantial new development is planned which will benefit from an improved retail offer within walking distance.

Assists in the alleviation of over-trading

7.34 Whilst the trading performance of retail locations in the Study Area is mixed, the RIA demonstrates that the Aldi store at Tir y Berth is currently overtrading at around 121% of anticipated levels. This performance is despite the fact that just under 70% of available expenditure is leaking from Zone 3. A similar picture is evident in Zone 4 at Ystrad Mynach, where the Lidl store is currently overtrading at around 164% of anticipated levels.

7.35 Whilst a strong trading performance is not usually a cause for concern, when foodstore provision is insufficient to meet local needs, this can lead to operational issues and a poor customer experience at existing stores. Operational issues that can arise include empty shelves due to insufficient stock to meet demand; queuing at check outs due to insufficient check out space; and localised traffic, congestion and parking issues, where car parking provision is insufficient to meet demand.

7.36 The fact that Aldi are seeking to deliver a second store in the area where their existing store is overtrading, is a clear sign that the current store is unable to fully satisfy the level of demands for their offer, with this increasing in recent years due to growing popularity (evident in market share growth nationally) but also more recently, due to the cost-of-living crisis. Approval of these planning application proposals will assist to divert trade from a range of locations that are currently overtrading, include the existing Aldi store at Tir y Berth, allowing it to trade at the levels it was designed to, improving its overall operational efficiency, and enhancing the consumer experience as a result.

7.37 In light of this there is a clear qualitative need for the development proposals.

Addresses locally defined deficiencies in provision in terms of quality and quantity

7.38 It is clear from the level of convenience spend leaking from Zone 3 evident in the household survey that residents living within Zone 3 are having to travel elsewhere to access convenience shopping. Providing a closer facility would have obvious and clear benefits in terms of improving the quality and quantity of low-cost discount convenience shopping for this part of Caerphilly.

Summary

7.39 The findings of the retail tables indicate that Nelson is currently leaking a high level of expenditure, with existing retail locations only retaining around 31% of available convenience expenditure from the population.

7.40 A new Aldi store to replace the existing Co-op would help to rebalance this by retaining more spend locally.

7.41 In addition to the above, it is apparent that there is a clear qualitative need too, with the proposals meeting a number of the criteria set out in PPW linked to improving access to convenience provision in a disadvantaged area, alleviating significant levels of overtrading and helping to reduce car journeys at a location which is highly accessible for the local community. The proposals will therefore satisfy both aspects of the need test in conformity with PPW.

8. The Sequential Test

Introduction and Context

8.1 Paragraphs 4.3.18 to 4.3.24 of Planning Policy Wales (PPW) (2024) require that the sequential approach to site selection is applied to all proposals for '*main town centre uses*' on sites that are not 'in' an existing centre nor allocated in an up-to-date development plan. Further advice on the sequential test and its application is also provided by Technical Advice Note 4: Retail and Commercial Development (TAN4).

8.2 In this instance, the nearest defined centre is the Nelson Local Centre. The current LDP does not define the local centre boundaries, primary retail area or separate primary or secondary shopping frontages for any of the Local Centres. As the retail areas within these Local Centres are well established, we note that Council's Retail Capacity Study suggests that it may be appropriate to formalise these boundaries within the Replacement Local Development Plan, as it may assist in the application of the sequential test.

8.3 Whilst the site lies within the settlement limit for Nelson (defined as a local centre), and comprises previously developed brownfield land, the application of retail policies in the LDP relates to Principal Town Centres only. As such, our understanding is that the site occupies an out of centre location for the purposes of applying the sequential assessment. It is therefore necessary to assess '*in*' and '*edge-of-centre*' alternatives. It is also necessary that any site assessed which is not within a town centre is "*accessible by a choice of travel modes, including active travel and public transport*", as required by PPW. This applies to '*edge of centre*' and '*out of centre*' sites.

8.4 It is clear that the planning application site is situated on an accessible site, given its existing use as a retail location, indicating its previous acceptability for this form of land use. It is also accessible from nearby housing and indeed, the Ty Du site adjacent is also being redeveloped into a mix of uses, including residential.

Scale and Form of Development, Catchment Area and Centres Assessed

8.5 Whilst both the Council's LDP and PPW are silent on the appropriate area of search for sequentially superior sites, the English Planning Practice Guidance ('PPG') identifies that a conventional approach is to consider the extent of the catchment area likely to be served by the proposal and then to identify alternative sites, located within or on the edge of existing centres which serve an equivalent catchment, and which could accommodate the scale and form of development proposed. In the context of these proposals, the catchment is discussed in section 7 of this report.

Scale and Form of Development

8.6 In this instance, the scale and form of retail development is a discount foodstore of 2,000 sq. m GEA (1,356 sq. m net sales), alongside requisite customer car parking (120 spaces total), vehicular access roads, servicing area, and associated hard and soft landscaping. This is located on a site of 1.02 hectares (2.51 acres). Accordingly, it is necessary to define an area of search for sequentially preferable sites based purely on the specific trading characteristics of a development of this size.

8.7 Whilst this is the case for these proposals, there is a minimum floorspace and associated development which these proposals require, and it is these characteristics have been used as the basis for this sequential assessment. This comprises:

A Gross internal area of 1,842sq.m, allowing for a net sales area of 1,344 sq.m, of which 1,075 sq.m comprises convenience sales.
Customer Parking of at least 105 spaces.
A minimum site area of 2.0 acres (0.8ha).

Primary Catchment Area

8.8 The establishment of a catchment area for the sequential test must be based on professional judgment, in view of the fact that the Council's Local Development Plan, PPW and all available planning guidance (i.e. Wales Technical Advice Note 4: Town Centres) are silent on the approach. However, it is worth noting that previously published English Government Practice Guidance1 on the application of the sequential test advises in relation to the 'area of search' for sequential sites that (Paragraph 6.22):

"*When considering applications, LPAs will need to consider the extent of the catchment area likely to be served by the proposal, and to then identify alternative sites located in existing centres within the catchment area. This will determine whether sites in other nearby centres may represent more appropriate locations in which to accommodate the scale and form of development proposed*" (AY emphasis).

8.9 Accordingly, in applying the sequential test in this instance, we have followed this conventional and logical approach of considering the extent of the catchment area likely to be served by the proposal and then to identify alternative sites, located within or on the edge of existing centres which serve an equivalent catchment, and which could accommodate the scale and form of development proposed.

8.10 The limited size and goods offer of a discount foodstore such as the one proposed means that its catchment area will not be particularly extensive and is unlikely to extend significantly beyond Nelson, Treharris, Bedlinog and Abercynon. This is evidently the customer base that a discount foodstore in this location would chiefly serve, given the town's size and population. A discount foodstore the size of Aldi typically targets a catchment population of 15,000 people, as explained on their property website[2]. This represents their '*Primary Catchment Area*'*.* The Primary Catchment Area for the store is shown in Appendix 2.

8.11 It should be made clear that this catchment area is not just some arbitrary distance based on Aldi's commercial preferences, instead it is a reasonable and realistic geographic area from which a foodstore of this size will draw the vast majority of its trade. For example, Aldi's property website is clear[3] that a new discount foodstore requires a catchment population of some 15,000 people. We anticipate that other discount food retailers such as Lidl seek a comparable customer base in view of their equivalently sized format. Based on up-to-date Experian population data, the catchment area from the planning application site contains approx. 18,591 people (Source: Experian 2023). This clearly demonstrates that the size of catchment area defined is sufficient in terms of accounting for the proposed foodstore's sphere of influence.

Centres Assessed

8.12 Within the catchment area of the planning application site there are a number of allocated town and local centres. These include:

- Nelson Local Centre,
- Treharris Local Centre, and
- Abercynon Local Centre,

[1] DCLG Practice Guidance on Need, Impact and the Sequential Approach, December 2009
[2] https://www.aldi.co.uk/about-aldi/property
[3] https://www.aldi.co.uk/about-aldi/property

These locations are highlighted on the plans provided at **Appendix 2** of this *Planning and Retail Statement*.

8.13 It is relevant to note that these local centres offer traditional small parades or clusters of units, servicing a small scale, day to day retail need, which mostly serves a walk-in catchment. Given the nature of these centres being located in generally residential areas which are already built out, there are very limited '*in centre*' or '*edge of centre*' opportunities available to consider.

8.14 In line with both local and national planning policy it is therefore appropriate to assess whether there are any sequentially preferable alternative sites within or on the edge of all of the centres identified above as part of the sequential test's application.

Summary (Scale and Form of Development, Catchment Area and Centres Assessed)

8.15 Drawing the above together, in this case a logical area of search for sequentially preferable sites should encompass '*in-centre*' and '*edge-of-centre*' opportunities within (and immediately surrounding) the centres identified above). Any site must also be accessible by a range of transport means, as required by PPW. Within the defined area of search, candidate sites must be able to accommodate (as a minimum) an Aldi discount foodstore and its associated car parking, access arrangements and hard and soft landscaping –as this is the scale and form of development that is proposed. A site will be considered sequentially preferable where it is '*suitable*' and '*available*' which necessarily includes consideration of deliverability / viability.

8.16 Whilst in this case the total site area is 1.02 ha it is necessary for applicants and Local Planning Authorities to demonstrate 'flexibility' in their approach, in-line with the relevant section of PPW. Accordingly, this policy requirement and relevant legal / appeal precedents are examined in detail under the following headings.

The Requirement to Demonstrate Flexibility / Legal and Appeal Precedents

8.17 Paragraph 7.5 of the TAN4 requires applicants and Local Planning Authorities to demonstrate 'flexibility' on issues such as format and scale when considering sites in, or on the edge, of existing centres as part of applying the sequential test. Whilst no indication as to what degree of flexibility is required is contained within TAN4, PPW, the LDP or indeed the English Planning Practice Guidance (other than 'format and scale') the 'Rushden Lakes' Secretary of State ('SoS') Call-in decision[4] (which post-dates their original publication) has clarified the position, with the Inspector (Paragraph 8.49) highlighting that 'flexibility' concerns matters including *"flexibility in a business model, use of multi-level stores, flexible car parking requirements or arrangements, innovative servicing solutions and a willingness to depart from standard formats".* In Paragraph 15 of the decision letter, the SoS agrees with the Inspector that these are issues of principal relevance in demonstrating flexibility.

8.18 This important Call-in decision has also provided clarity on whether there remains a requirement to consider 'disaggregation'[5] when demonstrating flexibility as part of the sequential test. The Inspector is quite clear at Paragraph 8.47 of his report that *"there is no longer any such requirement stated in the NPPF"* and that *"had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF*". In Paragraph 16 of the decision letter, the SoS agrees with the Inspector that there is no requirement to consider disaggregation when applying the sequential test. This approach has been followed in subsequent cases (see below).

[4] Land Adjacent Skew Bridge Ski Slope, Northampton Road, Rushden; Inspectorate Ref. APP/G2815/V/12/2190175; 11 June 2014.
[5] Consideration being given to the separation of a retail scheme across a number of sequentially superior sites.

8.19 A final matter of seminal importance when considering 'flexibility' and indeed interpreting the sequential test more widely is the *Tesco Stores Ltd v Dundee City Council ('Dundee') Supreme Court Decision (2012)*. In summary, this establishes that:

a. if a site is not suitable for the commercial requirements of the developer in question, then it is not a 'suitable' site for the purposes of the sequential approach; and,
b. that in terms of the size of the alternative site, provided that the applicant has demonstrated 'flexibility' with regards to format and scale (explained in the paragraph above), the question is then whether the alternative site is suitable for the proposed development, not whether the proposed development could be altered or reduced so that it can be made to physically fit the alternative site.

8.20 The implications of the Dundee decision were also considered by the SoS as part of the 'Rushden Lakes' Call-in decision. In Paragraph 15 of the decision letter, the SoS agrees with the Inspector that the sequential test relates entirely to the application proposal and whether it can be accommodated on an actual alternative site. In other words, the Dundee decision clearly applies to the NPPF in England and PPW in Wales.

8.21 Two further relatively recent High Court decisions[6] have also considered (inter alia) the sequential test and confirmed the importance of demonstrating flexibility on issues such as format and scale. A developer's own intentions may be taken into account and have a bearing –for instance when considering what demand a proposal is intended to meet. However, the sequential approach should be 'operator blind' and not become a self-fulfilling activity and divorced from the public interest.

8.22 Specifically, in *Aldergate Properties Limited v Mansfield District Council [2016] EWHC 1670 [Admin]* the judgement emphasised that in considering how to apply 'suitability' and 'availability' the general meaning would be that a site should be *"..'suitable' and 'available' for the broad type of development which is proposed in the application by approximate size, type and range of goods. This incorporates the requirement for flexibility in [24] NPPF, and excludes, generally, the identify and personal or corporate attitudes of an individual retailer.…"* (Paragraph 35 of Judgement).

8.23 In summary, whilst it is necessary for applicants to demonstrate 'flexibility' on issues such as format and scale when applying the sequential test, it is clear that under the development plan there is n<u>o requirement to consider 'disaggregation'</u> nor to explore changes that would materially alter the application proposal such that it no longer met commercial requirements (i.e. a material reduction in size). These matters have been considered as part of numerous 'call-in' and appeal decisions[7] which whilst based on policy for England we consider are still relevant to consider for proposals in Wales. This is because the SoS / Planning Inspectorate clearly draw heavily on the key caselaw referenced in this section when interpreting the sequential test (and specifically the requirement for disaggregation).

Flexibility in the Context of the Application Proposals

8.24 Aldi recognises the need for 'flexibility' in promoting sites for development and the retailer pursues non-standard stores where this will assist in meeting planning policy requirements. When considering the scope for flexibility, however, the inherent nature of Aldi's operation as a 'deep discount' food retailer must be borne in mind. Accordingly, there are a number of key areas where it is not possible to alter the core design of the store; as to do so would undermine the operational efficiency of the business model and hence its viability.

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[6] Warners Retail (Moreton) Ltd v Cotswold District Council (2016) and Aldergate Properties Ltd v Mansfield District Council (2016).
[7] See for example: APP/P0119/V/17/3170627 - The Mall, Cribbs Causeway, Patchway, South Gloucestershire BS34 5DG (October 2018); APP/T3725/W/18/3204311 - Leamington Shopping Park, Tachbrook Park Drive, Warwick, CV34 6HR (March 2019); and, APP/R0660/V/17/3179610, APP/R0660/V/17/3179605 and APP/R0660/V/17/3179609 - Land at Earl Road, Handforth Dean, Cheshire, SK9 3RW (June 2019).

Foodstore

8.25 The fundamental requirements of a modern Aldi foodstore's design and layout are therefore as follows:

Retail Sales Area: This is the most important aspect of store building design. A circa 1,300 sq. m floor area is required to provide approximately 2,000 core product lines, and the dimensions of the retail area are determined by the need to ensure adequate product display space is provided. The rectangular shape of the retail sales area is also specifically designed to enable efficient transfer of products. In view of its critical importance to the trading and operational success of Aldi's business, the size and proportions (shape) of net retail floorspace is one area where it is not possible for Aldi to depart from their core design, as to do so would undermine trading viability. Such a configuration is coincidentally an optimum solution to enable shoppers to shop whilst respecting social distancing and cannot reasonably be reduced.

Storage and Ancillary Non-Retail Floorspace: Where the size and shape of a particular site requires reconfiguration, Aldi can exhibit flexibility, such as compromising service and storage facilities. However, the foodstore must be capable of being serviced by a HGV delivery vehicle and the Site layout must enable the delivery vehicle to enter and leave in forward gear, and for the vehicle to be able to dock correctly and safely in the purpose-built delivery area of the store (a dock-leveller).

Customer Car Parking: Aldi foodstores are required to have immediately adjacent surface-level car parking facilities. This is because an Aldi foodstore's primary function is to cater for 'bulk' food shopping needs and therefore very many customers will be visiting to undertake a 'weekly' shopping trip, involving several heavy shopping bags. Customers may also be visiting to purchase a product from Aldi's non-food 'special buy' range which could be large / heavy and therefore unmanageable on foot. Accordingly, it is a pre-requisite that most customers have the opportunity to take their goods home via private car, irrespective of the accessibility of the store location via sustainable modes of transport, for those undertaking smaller basket shopping.

8.26 In light of the above, with regards the application of 'flexibility' to the planning application scheme when applying the sequential test, the following is proposed:

The 127 car parking spaces could be reduced to only around 105 spaces –which is Aldi's minimum requirement for their current foodstore format.

8.27 Based on the above identified areas where 'flexibility' can be demonstrated in relation to the proposed retail store, it is considered that a site area requirement could be reduced to **0.8ha**, which is regarded as the minimum realistically necessary to accommodate a discount foodstore of 1,883 sq. m GEA and its supporting site infrastructure (i.e. customer car parking, vehicular access/egress, servicing area, pedestrian circulation space and basic landscaping).

Conclusions

8.28 In summary, measures have evidently been taken in the design of the scheme to maximise 'flexibility' in terms of the scale and form of the development proposed. Notwithstanding this, for the purposes of the sequential assessment, the applicant has tested a considerably smaller site area than is actually proposed for this planning application. Thus, the applicant is clearly demonstrating 'flexibility' in line with the PPW's requirements.

Sequential Site Assessment

8.29 Having established the appropriate catchment area, the centres to be assessed within it, and the scale and form of commercial development to be tested (having regard to flexibility); this analysis now turns to consider any candidate sites which are potentially ‘suitable’ and ‘available’.

8.30 Having applied the above, we have not identified any development sites within or on the edge of any of the centres within the catchment area, which could realistically accommodate the scale and form of development for which planning permission is sought –even when demonstrating significant flexibility in terms of developable area.

8.31 This outcome is not particularly surprising given the physically constrained nature of these traditional and very small scale local centres located within the store’s catchment area. These factors severely limit the potential for the expansion of the centres.

8.32 Overall, for the robust reasons outlined in this section of our report, it is considered that there are no sequentially preferable sites within a realistic catchment area for the scale and form of development proposed and compliance can therefore be demonstrated with the sequential approach to site selection as set out in Paragraphs 4.3.18 to 4.3.24 of PPW.

9. The Retail Impact Test

9.1 As outlined earlier, Paragraph 4.3.26 of PPW requires an assessment of impacts for all retail planning applications of 2,500 sq.m gross floorspace or greater if located on the edge of or beyond a designated retail and commercial centre, once a need has been established. Paragraph 4.3.27 confirms for smaller retail planning applications that planning authorities will need to determine whether an assessment if necessary and that requests for impact assessments should be proportionate to potential impacts.

9.2 The planning application is for an Aldi discount foodstore, with 1,356 sq.m net sales. The proposals include 1,085 sq.m of convenience floorspace with the remainder, 271 sq.m for comparison sales. Given this small scale of non-food floorspace, the impact assessment will focus only on the convenience element. We note the foodstore proposals are significantly below the 2,500 sq.m threshold set out in national policy for requiring an assessment of impacts.

9.3 We also note that the proposals seek to redevelop an existing retail store, including 723sqm of net retail floorspace. Of this, 651sqm is convenience and 72sqm comparison.

9.4 Notwithstanding the above, a proportionate retail impact assessment has been completed in accordance with Paragraphs 4.3.26 and 4.3.27 of PPW to inform consideration of the application proposals. The findings of this assessment are enclosed within this section and should be read alongside the detailed tables at **Appendix 3**.

9.5 The retail impact assessment undertaken represents a 'worst-case' in respect of how the existing retail floorspace on the site has been treated, whereby the existing Co-op's turnover has been informed by the Council's retail capacity study survey figures, rather than using the company average sales density or seeking to only assess the uplift in retail floorspace in isolation.

9.6 As set out within PPW and TAN4, the following matters will be considered:

- Impact of the proposals on existing, committee and planned public and private investment in a centre or centres in the catchment area;
- The impact of the proposals on allocated sites outside centres being developed in accordance with the development plan;
- Impact of the proposal on in centre trade and turnover in defined centres in the catchment, taking account of current and future expenditure capacity;
- Impact of the proposals on centre vitality and viability, including local consumer choice and range and quality of the comparison and convenience retail offer; and
- Impact on travel patterns over the catchment area.

9.7 In interpreting town centre policy concerning retail impact, it is noteworthy that Paragraph 4.3.25 of TAN4 states that the purpose of the retail impact assessment is to consider these issues and determine if these developments are likely to have detrimental consequences. The implication being that an application that should be refused where any adverse impacts are likely to give rise to detrimental consequences, and that an impact which is merely adverse is not a direct reason for refusal.

9.8 Paragraph 1.18 of PPW confirms a presumption in favour of sustainable development and is clear that permission for development should be granted in accordance with the development plan unless 'material considerations indicate otherwise to ensure that social, economic, cultural and environmental issues are balanced and integrated'. We consider that any adverse impacts that are not likely to result in detrimental consequences are capable of being weighed against positive social, economic, and environmental impacts in the overall planning balance.

9.9 Below we consider the impacts of the application scheme in relation to the range of retail impacts set out in PPW and TAN4 within this section of our report.

Impact on Existing Committed and Planned Investment in Centres

9.10 When assessing impact upon investment it is relevant to consider, the policy status of the investment, the progress in securing the investment and the extent to which an application is likely to undermine the planned development.

9.11 The Masterplan for Ystrad Mynach was prepared in 2019. It sets out the future development and regeneration opportunities proposed for Ystrad Mynach and the wider area, including Nelson as a Local Centre. It seeks to build on the existing strengths of Ystrad Mynach to ensure that the area enhances its role as a business, employment, service, retail and sporting centre.

9.12 The area of Caerphilly and Ystrad Mynach has been identified as a Strategic Hub by the Valleys Task Force as an area where public money is focused to provide opportunities for the private sector to invest and create new jobs. In terms of the retail offer, the main shopping provision in Ystrad Mynach comprises two national supermarkets, namely Lidl and Tesco and over 80 other commercial units containing a good mix of independent retailers.

9.13 Nelson is a smaller Local Centre which has a supermarket, a Co-Op, and a range of small independent retailers. Nelson is a key settlement within the Masterplan area, strategically located on the A472 corridor, close to the A470. The Ty Du site located adjacent to the subject site, on the southern side of Nelson, is identified as a significant regional development opportunity with considerable potential economic and social benefits. It is identified for the provision of a mixed-use sustainable development comprising 3.8 hectares of employment land and some 200 new homes (including affordable housing). In the longer term, given the excellent location, close to the A470, there is considered to be potential to further expand the site to include additional land to the east and/or west for development to include hotel and leisure provision, subject to a future review of the LDP.

9.14 The Masterplan supports the development of housing on both brownfield and greenfield sites in sustainable locations. In addition to the major opportunity at Ty Du, the site mentioned above, the Masterplan also highlights the opportunity for the wider redevelopment of land at the potential new railway station (to the east of Handball Court in Nelson) to accommodate an element of retail and residential units (circa 90 units).

9.15 It is notable that the majority of these projects comprise smaller scale proposals to improve active travel opportunities, changes to weirs to reduce flood risk, housing conversions and public realm improvements. Where projects are larger scale, such as those related to the college, or redevelopment of vacant buildings for office use/working spaces, it is very apparent that the application proposals would have no effect on these ambitions.

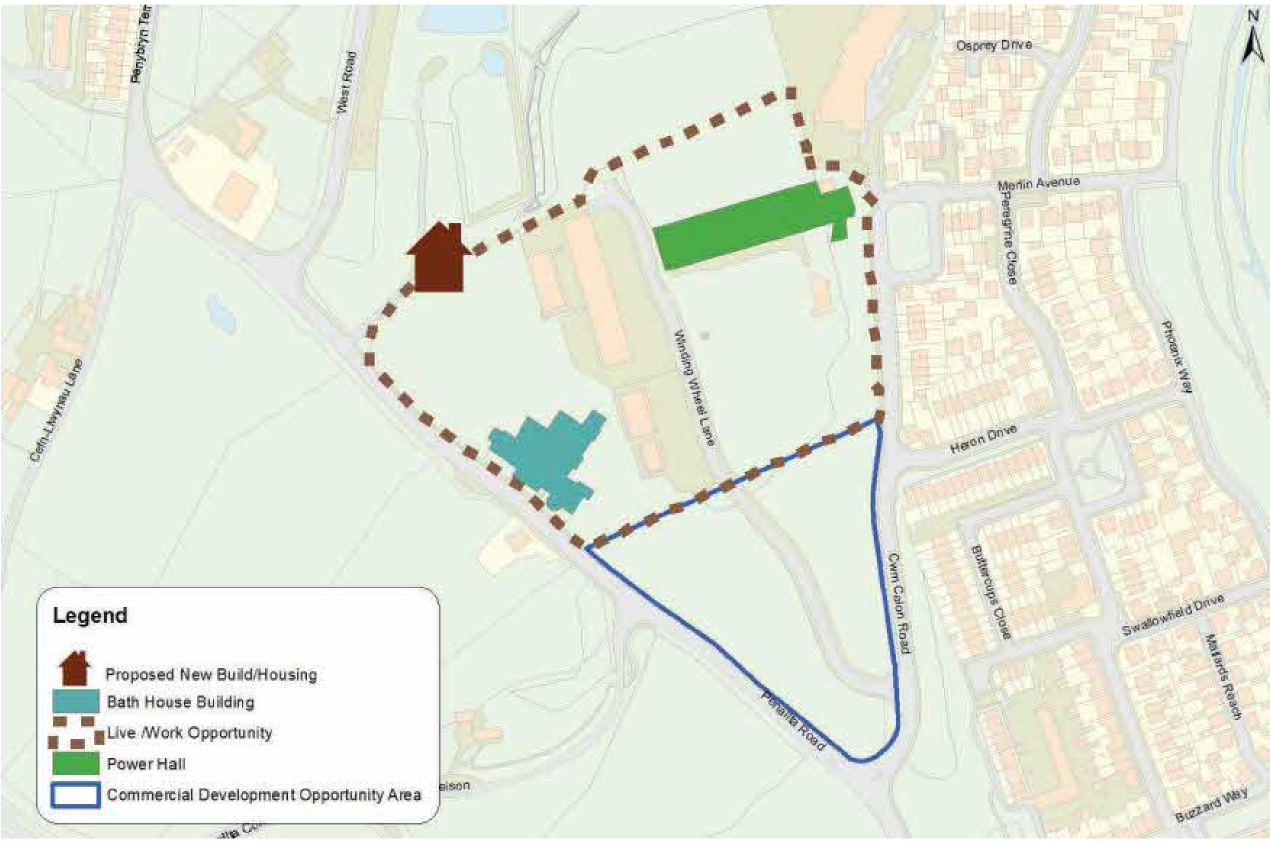
9.16 We are therefore confident that by the nature of the application proposals, and their location adjacent to the Ty Du masterplan site, they would play a complementary role to the ambitions set out within Masterplan, and that there would be no impact on existing committed or planned investment in Nelson or the wider area.

Impact on Allocated Sites Outside Centres

9.17 Within the adopted Local Development Plan, there are sites set out under policy CM4 for new retail, commercial leisure and office developments in Principal Town and Local Centre sites. Due to the nature of the application proposals, we do not consider that they would actively compete with those proposals and so consider there would be no impact.

9.18 Under Policy CM4, the Penallta Colliery site, Ystrad Mynach (site ref. CM4.6) 2.0ha is allocated for retail units and offices, with the allocation stating: "*The Masterplan for this large housing development identified an area suitable for employment and retail uses ancillary to the new community. Suitable retail uses might include a small food store to meet the needs of the future residents, a Public House and Restaurant / Take Away. Offices providing local services and employment opportunities would also be welcomed*".

9.19 The SPG Ystrad Mynach Masterplan (2019) identified a triangular area of land on the Colliery site as shown below. Whilst the precise scale is not defined, an Aldi store at this location would obviously cater for demands beyond the needs of future residents at this site, counter to the allocation which seeks a small food store to meet the needs of the future residents of the site. The site is also deemed unsuitable for the proposed Aldi store due to being located remote from the primary catchment area the store is seeking to serve, in addition to its proximity to Aldi's existing store at Tir-y-Berth.



Impact on In Centre Trade and Turnover

Assessment of Trade Diversion and Impact

9.20 As explained in Section 7, the proposed foodstore will principally serve a relatively localised catchment area around Nelson including populations within Bedlinog, Treharris, Trelewis and Abercynon.

9.21 We have undertaken a detailed assessment of the likely impacts of the proposed scheme on the trade/turnover of existing centres and stores located within and beyond the catchment area.

9.22 As for our quantitative capacity assessment, our quantitative retail impact assessment focuses on the convenience goods floorspace contained within the discount foodstore (which represents the vast majority of the retail floorspace proposed).

9.23 The amount of comparison goods floorspace proposed within the foodstore is small and is ancillary to the main convenience goods role of the Aldi store. Moreover, much of the comparison goods items sold by the discount supermarket operators are 'special buy' products, which provide a limited, diverse and changing range of promotional comparison goods items. The broad and changing nature of the comparison offer expected to be sold from the small amount of comparison retail floorspace proposed means that any comparison trade diversion associated with the proposed foodstore will be dispersed thinly across a wide range of stores, with no individual store or centre experiencing a material level of trade diversion.

9.24 The potential for an Aldi foodstore to compete with existing town centre comparison goods retailers, which are typically focused on providing a traditional 'high-street' retail offer is therefore extremely limited. It is therefore considered highly unlikely that that the modest amount of comparison retail floorspace within the proposed foodstore would result in a significant adverse impact on the vitality and viability of any centre.

9.25 Our assessment considers the impact of the application scheme, and follows a standard step-by step methodology utilising the assessment of quantitative retail capacity set out in Section 7 and at Tables 1 to 5 at Appendix 3, which establishes the turnover of the application scheme, and existing shopping patterns across the Study Area, which encompasses the core catchment area of the proposed foodstore (i.e. Zone 3).

Anticipated Convenience Trade Draw to Development and Solus Impact (Tables 7 -9)

9.26 The proposal's convenience goods trade allocation from the various Zones is set out at Table 6 of **Appendix 3.** This identifies that 95% of the draw for the store will come from Zone 3 and 5% is expected to come from outside the study area.

9.27 The Council's Local Development Plan, PPW and all available planning guidance (i.e. Wales Technical Advice Note 4: Town Centres) are silent on the approach to assessing where the turnover of an application proposal is likely to be diverted from. However, a common starting point for this exercise and the approach endorsed by the English Government is to consider the catchment's existing shopping patterns 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?).

9.28 As the application proposals are centred around a 'main' food shopping destination (a discount foodstore), it stands to reason that the scheme will divert the vast majority of its trade from equivalent 'main' food shopping destinations (i.e. medium / large mainstream foodstores and discount foodstores). This assumption is entirely consistent with the approach advocated within the English Government's Planning Practice Guidance, which confirms that a guiding principle when assessing retail impact is that '*like affects like*' (see PPG Para Ref. 2b-015-20190722).

9.29 Given this advice, our approach has been to have greatest regard to the existing 'main' food shopping patterns in the catchment area when allocating the trade diversion of the scheme. We do not propose to provide an exhaustive list of all monetary diversions within this supporting statement as they are clearly outlined in Table 7 of **Appendix 3**. However, we do provide a commentary on the stores / centres from which the majority of the scheme's trade will be diverted below.

Nelson Local Centre

9.30 As the proposal seeks to replace the existing Co-op store on Mafon Road, Nelson, the retail impact assessment removes the existing turnover of the store and diverts all of the zone 3 expenditure to the new Aldi store on the same site. This represents a 'worst case' scenario in terms of retail impact as it uses the lesser turnover figure being the household survey based performance of the Co-op store (£3.23m; £2.51m from Zone 3), rather than only assessing the uplift in retail floorspace from the existing Co-op against the proposed Aldi and applying the company average sales density against that

9.31 As a result, the percentage impact on Nelson Local Centre is artificially high at 39.41%, but once the proposed Aldi store's turnover is accounted for within this local centre, it results in a positive impact on the local centre as you would expect.

Destination	Solus Trade Diversion		Post-Development Total Turnover	Solus Trade Impact
	%	£m	£m	%
ZONE 3				
Nelson Local Centre				
Co-op, Commercial Street, Nelson	1%	£0.11m	£3.31m	-3.2%
Co-op, Mafon Road, Nelson	22%	£2.51m	£0m	-77.7%*
Sub Total Nelson Local Centre	**23.0%**	**£2.62m**	**£3.31m**	**-39.4%**
Treharris Local Centre				
Co-op, Fox Street	1%	£0.11m	£1.83m	-5.9%
Local Shops	0%	£0.00m	£0.76m	0%
Sub Total Treharris Local Centre	**1%**	**£0.11m**	**£2.59m**	**-4.22%**
Local Shops, Bedlinog	0%	£0m	£2.20m	0%
Local Shops, Gelligaer	0%	£0m	£0.25m	0%
Aldi, New Road, Tir y Berth	18.0%	£2.05m	£8.23m	-20%
OTHER BEYOND ZONES 3				
Various	58%	£7.21m	-	-
TOTAL	**100%**	**£12m**	**-**	**-**
*Represents 100% of existing Co-op, Mafon Road's trade from Zone 3				

Destination	Post-Development Total Turnover £m
ZONE 3	
Nelson Local Centre	
Co-op, Commercial Street, Nelson	£3.31m
PROPOSED ALDI, MAFON ROAD, NELSON	£12m
Sub Total Nelson Local Centre	**£15.31m**
Treharris Local Centre	
Co-op, Fox Street	£1.83m
Local Shops	£0.76m
Sub Total Treharris Local Centre	**£2.59m**
Local Shops, Bedlinog	£2.20m
Local Shops, Gelligaer	£0.25m
Aldi, New Road, Tir y Berth	£8.23m

Treharris Local Centre

9.32 Also within Zone 3, is Treharris Local Centre located in Merthyr Tydfil CBC. This is another small-scale centre with a limited retail offer mostly offering top-up convenience shopping facilities. This includes the Co-op at Fox Street, and a number of other small convenience stores.

9.33 Based on this, and the proximity to the application site, our assessment predicts only a modest impact on the Co-op store at Fox Street amounting to 5.85% (£0.11m). Overall, the impact on the local centre is assessed to be 4.22%, and would not have a significant adverse impact on the centre’s vitality or viability.

Out of Centre Locations

9.34 Table 7 of **Appendix 3** shows that while there are a number of other out of centre retail locations within Zone 3, it is only the Aldi at New Road, Tir y Berth that the proposals would compete with. The assessment finds that there would be 18% of trade diverted from the existing Aldi at Tyr y Berth. This diversion is anticipated based on the level of current attraction for residents within Zones 3, and the level of overtrading currently experienced at this store.

9.35 It is notable that the existing Aldi store is located in an ‘out of centre’ location and so is not protected by planning policy. At these levels of diversion though, it is clear that the proposals would not affect the long-term viability of this location and it would continue to trade in line with company average sales densities following the development.

Beyond Zone 3
Ystrad Mynach Principal Town Centre

9.36 Given the level of leakage from Zone 3, and the destinations identified by the household survey that the expenditure is leaking to, it is inevitable that a level of diversion from the Tesco and Lidl stores in Ystrad Mynach Principal Town Centre will occur.

9.37 Our assessment finds that there will be 12.2% diverted from the Lidl on Pengam Road, commensurate with the similarity of offer between Aldi and Lidl, and 4.4% diversion from the Tesco on New Road. Overall, the impact on Ystrad Mynach is anticipated to be 6.9% / £2.74m. At this level, there is clearly not going to be a significantly adverse impact on the centre's vitality or viability.

Summary

9.38 Overall, the tables show that we believe that the broad majority of the scheme's turnover will be diverted from the largest, closest and most popular 'main' food shopping destinations. There would also logically be a disproportionate effect on surrounding Aldi foodstores –which the catchment population are already known to use. This is entirely consistent with the English Government's PPG, and the principle that '*like affects like*' when assessing retail impact.

Quantitative Convenience Goods Impact –Conclusions

9.39 Drawing the above points together, it is clear that the trading effects of the retail proposals will give rise to relatively modest convenience retail impacts across the surrounding foodstores and locations located within defined centres. There is not expected to be any significant adverse impact on Nelson Local Centre or Treharris Local Centre, located within the store's primary catchment area.

9.40 For Ystrad Mynach Principal Town Centre, and although outwith the store's primary catchment area, there will only be a modest level of impact (6.9%) ensuring that its long-term vitality and viability is safeguarded. It is therefore clear that the proposals can be accommodated without any significant adverse impacts occurring.

Convenience and Comparison Goods –Qualitative Impact

9.41 In addition to the quantitative analysis which has been undertaken, there is merit in setting out a number of qualitative factors which underline why an Aldi foodstore in this location will not result in a 'significant adverse' impact on the vitality and viability of any centre in particular:

Aldi's Deep Discount Business Model

9.42 There are some key themes to outline in relation Aldi's business model which are relevant when considering impact upon vitality and viability as a whole:

Firstly, an Aldi discount foodstore does not represent an 'everything under one roof' shopping destination as is the case with many mainstream foodstores. The retailer will stock their 'own brand' versions of the staple food products that typically comprise a family's weekly shop alongside a very limited non-food offer. This means that mainstream foodstores and other independent convenience retailers will still be relied upon where consumers are seeking mainstream branded goods.

Secondly, in contrast to many larger foodstores, the proposed Aldi will not include an in-store café, post-office, dispensing pharmacy, dry-cleaners, travel agent, opticians or photo processing. Nor will there be staffed butchery, fishmonger, delicatessen or greengrocery counters. Also, Aldi do not stock tobacco –a staple of many local newsagents. Given this position, a future Aldi shopper will still be wholly reliant upon existing traders in surrounding local centres, for example, for the vast majority of their specialist food retail (i.e. butcher), non- food retail, retail service, and leisure needs. The district centres will therefore retain a strong customer base.

Thirdly, in terms of Aldi's non-food retail offer, this only accounts for 20% (271qm) of the store's sales area and the range of goods stocked is seasonal and continuously rotated on a 'when it's gone it's gone' basis, with no single product range predominating. Therefore, the potential for impact is very limited; with non-food goods which may cross over with a local trader's offer on sale for only a very limited period, rather than all year-round.

Aldi's Retail Offer and the Local Context

9.43 In addition to the above, it is worth noting Aldi's offer, has most recently won awards from Which? for being the Cheapest Supermarket in the UK.

9.44 Access to high quality, affordable food items, is therefore an important qualitative consideration in support of the proposals.

Overall Implications for Vitality and Viability of Surrounding Centres

9.45 Whilst the preceding section has highlighted that the level of quantitative impact on surrounding centres as a consequence of the development proposals will be relatively low; in considering what this will actually mean for their vitality and viability, it is important to provide a proportionate commentary on their current health, role and function. The implication being that where a centre is in good health it will be well placed to withstand modest trading impacts without these resulting in a 'significant adverse' impact on overall vitality and viability.

9.46 Accordingly, detailed health check assessments are provided below.

Impact on Centre Vitality and Viability

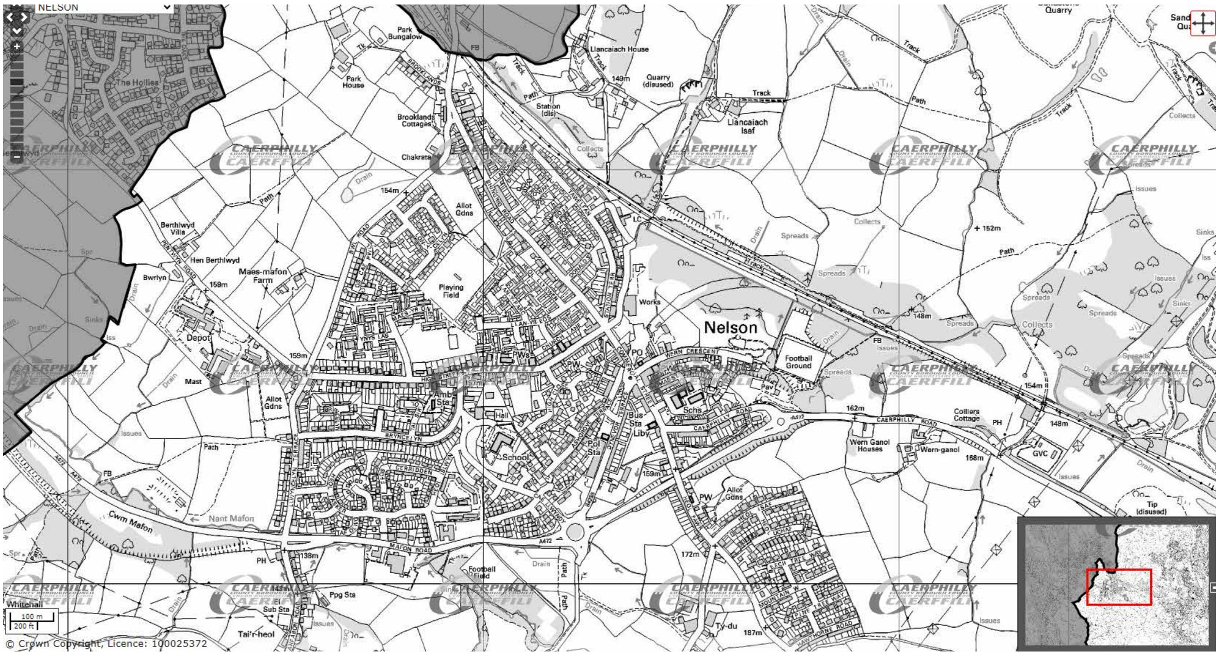
9.47 In order to provide a baseline for the assessment of impact on town and local centres within the catchment area of the proposed store we have undertaken health check assessments of the relevant defined centres. The focus for the assessment has been on those defined centres which are within or on the edge of the primary catchment area of the proposed foodstore. The primary catchment area is shown on the plan in Appendix I and includes the following defined centres:

- Nelson local centre
- Treharris local centre (Merthyr Tydfil CBC)
- Abercynon local/neighbourhood centre (Rhondda Cynon Taf CBC)

Nelson Local Centre
Centre Overview

9.48 According to Policy SP4 (Settlement Strategy) of the Caerphilly County Borough Council Local Development Plan 2006-2021 (adopted 2010), Nelson is defined as one of the four Local Centres. There are 2 No. Principal Towns and 2 No. Local Centres in the Northern Connections Corridor.

Extract from CCBC Local Development Plan – Nelson. Nelson is not defined on the adopted constraints map



9.49 In addition to offering a variety of retail facilities, they also provide a range of facilities and services including employment opportunities, leisure facilities and community facilities. The supporting text to Policy SP4 states that:

9.50 "The role and function of individual settlements underpins the Strategy for the County Borough. The Strategy identifies five Principal Towns and four Local Centres based on their functions as major employers, retail centres, providers of services and centres of population..."

9.51 Nelson is a small local centre that serves the suburban community. The local centre is not explicitly defined under the LDP (Local Development Plan) given its scale. The majority of retail services are located on Commercial Street (B4255). The local centre mainly comprises of a mix of A1 and A3 uses but when travelling outside of Nelson's local centre there are more leisure uses falling under the D1 use class.

9.52 There are limited residential properties within the local centre. Residential units within the local centre appear to be first floor flats above retail units. There are limited restrictions for on-street, car parking, except for Ashgrove Terrace, where there are dedicated bays with facilities for disabled parking (limited to 1-hour). On Dynevor Terrace there are 2 bus stops that offer direct travel to Caerphilly, Pontypridd, Blackwood, Merthyr Tydfil and Bargoed.

9.53 Based on the fieldwork undertaken by Avison Young on 22nd of December 2023, the local centre was found to contain some 38 units. 11 of the units recorded are convenience businesses.

Diversity of Uses
Convenience Goods

9.54 As Table I shows, the centre's convenience sector accounts for 28.9% of all units which is above the national average of 9.2%. The centre's convenience goods offer comprises of newsagents, takeaways and a Co-Op food store which offers a 'top up shop' role. This Co-Op is open from 7am to 10pm Monday to Sunday. The Co-Op sells fresh food, frozen goods, alongside non-grocery items such as cleaning products, magazines, and toys.

9.55 The remainder of the centre's convenience units comprise of bakeries, fresh fruit and vegetable store, a confectioner/tobacconist/newsagent, a health food store, butchers, and an off-licence. These stores seemingly co-exist and are likely sustained by passing trade and the residents of Nelson/surrounding villages.

Comparison Goods

9.56 The site survey found that comparison goods units comprise 10.5% of the 38 recorded units. This figure is below the national average of 26.8%. The retail representation is concentrated along Commercial Street (B4255). Most of these shops consist of independent stores selling baby clothes, flowers, ornaments, as well as other comparison goods.

***Table I**: Diversity of Uses in Nelson (surveyed in December 2023)*

Use Type	Number of Units (January 2024)	
	No.	%
Convenience	11	28.9%
Comparison	4	10.5%
Service	14	36.8%
Miscellaneous	6	15.8%
Vacant	3	7.9%
Total	38	100%

Services (Retail, Leisure, and Offices)

9.57 14 of the 38 units in the local centre were recorded to be either leisure, retail, or business service units. Service uses comprise 36.8% of all units within the centre.

9.58 The majority of services (retail, leisure and offices) are concentrated along Commercial Street (B4255).

Miscellaneous Uses

9.59 Alongside retail outlets, the site survey recorded a handful of miscellaneous units. Approximately 6 of the 38 units were recorded as miscellaneous (15.8%). These miscellaneous uses comprised of religious uses interspersed with shops.

Vacant Units

9.60 3 vacant units were recorded, which accounts for 7.9% of commercial units were recorded in the local centre. This is lower than the national average of 11.2%. The vacant units were not clustered or visually detrimental to the aesthetic of the local street scene/public realm of the local centre.

Balance Between Independent and Multiple Stores

9.61 Higher profile companies are not likely to invest in vacant units within a local centre (principal town centres are more likely to attract higher profile companies). However, high profile companies such as the Co-Op have placed a local convenience store that allows for a ‘top-up shop.’ As a result of high-profile companies not having units within the local centre, independent shops can make use of the opportunity to trade with less competition.

Accessibility

9.62 Adequate off-street parking facilities are available to the east of Commercial Street (B4255) with a free car park, within the local centre, to the West of Dynevor Terrace (B4255). Nelson is not pedestrianised. However, safe, and accessible pavements are provided, along with, multiple pedestrian crossings (zebra and traffic light controlled) and accessible footpaths. Whilst Nelson does not have a designated bus station, there are 4 stops within the local centre offering services to Blackwood and Pontypridd.

9.63 At the time of the site survey there was a good level of pedestrian activity despite the visit taking place on a Friday morning. The majority of footfall was recorded along Commercial Street (B4255) near most retail units/services. However, it should be noted that the time this was recorded was the 22nd of December when shops are expected to receive their highest footfall.

Environmental Quality

9.64 Given the local centre has a main access road, namely Commercial Street (B4255), there is constant traffic. However, traffic never came to a standstill on the day of the fieldwork, indirectly, helping mitigate against noise pollution.

9.65 Despite the vacancy rate, there was limited impact upon the visual aesthetics of the local centre. Litter bins are spread throughout the local centre which contributes to the environmental quality of the local centre. There are also cycle stands present.

9.66 Nelson benefits from green infrastructure, with a large concentration of trees adjacent to the B4255 (both Commercial Street and Dynevor Terrace) contributing to the aesthetics of the area. In addition to the green infrastructure, on the northern stretch of Commercial Street (B4255), there is a hard surfaced playing area, actively encouraging safe play within the local centre.

Summary/Conclusions

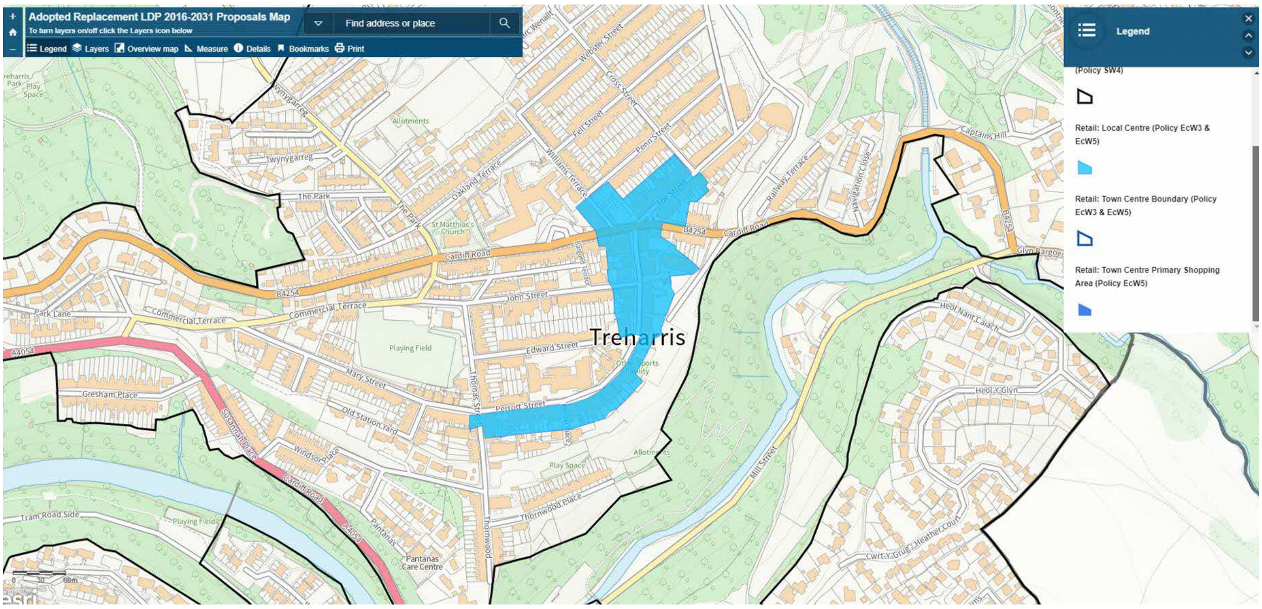
9.67 Our site survey found Nelson to be a healthy and attractive local centre with a good amount of pedestrian activity. Nelson has a diverse range of shops and services comprising of independent stores and shops allowing for ‘top up shops’ to general retail browsing. Nelson is likely to attract visitors from surrounding residential communities as well as local villages.

9.68 Whilst Nelson is not pedestrianised, facilities are in place to ensure that the local centre remains pedestrian friendly. Features to ensure Nelson remains pedestrian friendly include, controlled pedestrian crossings and wide accessible pavements. Additionally, litter bins are present to discourage littering, in turn ensuring Nelson remains pedestrian friendly.

9.69 Good parking facilities, together with presence of bus stops, ensure that Nelson is accessible for visitors using their own vehicles and by more sustainable modes of travel.

Treharris Local Centre
Centre Overview

9.70 The settlement of Treharris is located at the north west boundary between Caerphilly CBC and Merthyr Tydfil CBC, it is approximately 16km from Merthyr Tydfil and is designated in the Merthyr Tydfil County Borough Council Replacement Local Development Plan 2016 –2032 (adopted 2020) as a Local Centre.
Extract from the Merthyr Tydfil Adopted Replacement LDP Proposals Map



9.71 Policy EcW3 (Retail Hierarchy –Supporting Retail Provision) of the Merthyr Tydfil County Borough Council Replacement Local Development Plan 2016 –2032 (adopted 2020) sets out the retail hierarchy of the County Borough comprising Merthyr Tydfil Town Centre as the favoured location for retail development followed by the seven local centres of Dowlais, Gurnos, Cefn-Coed, Brecon Road/Morgantown, Troedyrhiw, Aberfan and Treharris.

9.72 Policy SW4 (settlement boundaries) defines the settlement boundary for Treharris and defines it as an 'other growth area' under the Revised Local Development Plan (adopted 2020).

9.73 The retail centre is located within the Treharris Conservation Area which is noted by the Conservation Area Character Appraisal as being a planned late 19th century 'model" industrial settlement, including civic, religious, commercial and residential buildings. The local centre runs along Fox Street as well as down Perrott Street. There is a mix of A1 and A3 uses, but also a significant number of vacant units. Regarding residential properties, there is a mixture of flats that are located above retail units and terraced housing. Most of these residential properties are located on Perrott Street.

9.74 Based on the fieldwork undertaken by Avison Young in December 2023, Treharris was found to contain 42 units. 11 of the units recorded are convenience businesses.

Diversity of Uses

Convenience Goods

9.75 Table I shows the centre's convenience sector accounts for 26.2% of all units with 11 convenience stores recorded during the survey. This is above the national average of 9.2%. The local centre's convenience goods offer comprises of a newsagent, takeaways, and a Co-Op. The Co-Op offers a top-up shopping role with a greater variety of goods. This Co-Op is open 7am to 10pm Monday to Sunday and sells fresh food, and frozen goods, alongside non-grocery items such as cleaning products, magazines, and toys.

Comparison Goods

9.76 The site survey found that comparison goods units comprise 7.1% of the 42 recorded units. This figure is below the national average of 26.8% but reflects the nature of the local centre. The 3 units recorded consisted of barbers and nail salons. It appeared, based on the current visual appearance, that some vacant units were previously comparison goods uses.

Table I: Diversity of Uses in Treharris (surveyed in December 2023)

Use Type	Number of Units (January 2024)	
	No.	%
Convenience	11	26.2%
Comparison	3	7.1%
Service	12	28.6%
Miscellaneous	1	2.4%
Vacant	15	35.7%
Total	42	100%

Services (Retail, Leisure, and Offices)

9.77 12 of the 42 units within Treharris were recorded to be either leisure, retail, or business service units. Service units totalled 28.6% of all units within the centre. There is not a specific concentration of service units, instead, the services are spread throughout Treharris.

Miscellaneous Uses

9.78 1 unit within the centre was recorded to be a miscellaneous service unit. This is a religious building and totalled a percentage of 2.4% which is above the national average of 1.14% (2012). At the time of the fieldwork there was no clear indication that this building was still in use.

Vacant Units

9.79 A total of 15 vacant units were recorded, which accounts for 35.7% of commercial units within the local centre. This is higher than the national average of 11.2%. Whilst there are evident gaps, the vacant units are not clustered. This high level of vacancy did not have a detrimental impact on the visual health of the centre. The vacant shops were boarded up and subject to minimal levels of vandalism at the time of visiting.

Balance Between Independent and Multiple Stores

9.80 As a local centre Treharris is not likely to attract higher profile companies. The services available in Treharris are predominantly independent businesses that can trade with less competition from ‘staple stores’, providing the opportunity for independent companies to grow financially, and, generally, service the needs of the local community.

Accessibility

9.81 There is a small accessible and designated car park, formally known as Treharris Square, comprising of 8 standard spaces, 2 disables spaces. At the time of visiting, the car park was full, and cars were waiting for available spaces. There is another larger car park off Perrott Street. This car park has approximately 60 spaces. There is no charge to park in either car park, but Treharris Square is limited to a 1-hour period. There is also good provision of on-street parking.

9.82 To the north of Bargoed Terrace, there are 3 bus stops that provide services to Merthyr Tydfil. These bus stops are located just outside (to the west) of the defined local centre boundary (Figure 1).

9.83 There is no train station in Treharris. The nearest train station is Quakers Yard. Quakers Yard is approximately 1.5km from Treharris local centre.

9.84 At the time of the site survey there was a high level of pedestrian activity despite the small number of units present in Treharris. The majority of footfall was recorded along Fox Street, where a pub/restaurant, as well as retail units, are present. These retail units offer weekly shops/top up services (i.e., Co-Op).

Environmental Quality

9.85 The main access roads run through the local centre and noise pollution was apparent. It is noted that the streets within the local centre are controlled by one-way systems to help filter traffic. As a result of filtering the traffic, traffic is not at a standstill, subsequently reducing noise. Additionally, this one-way system helps pedestrians cross from one side to another.

9.86 Despite the high vacancy rate, the negative impact upon the visual aesthetics of the centre was minimal. Litter bins are spread throughout the centre contributing to a positive environment for pedestrians. There are also trees and shrubbery planters throughout the local centre.

9.87 The local centre is situated within the Treharris Conservation Area. The vacancy rate does not deter away from the high-quality townscape the conservation area has.

9.88 Whilst there are not any benches present, to the north of Treharris Square car park there are gently sloping steps (providing access to Williams Terrace). These could be used as a place to sit in warmer weather. It should be noted that this is an assumption and was not witnessed at the time of visiting Treharris (December 2023).

9.89 There were multiple benches and outdoor seating areas associated with cafés at the time of the fieldwork.

Summary/Conclusions

9.90 Our site survey found Treharris to be an attractive local centre, albeit there are a number of long-standing vacant units. There was still significant pedestrian activity, in respect of the total number of units in use, and basic retail and commercial needs can be fulfilled. Whilst most community members fulfil their more specific retail needs in Merthyr Tydfil or Ystrad Mynach, Treharris offers day-to-day retail essentials.

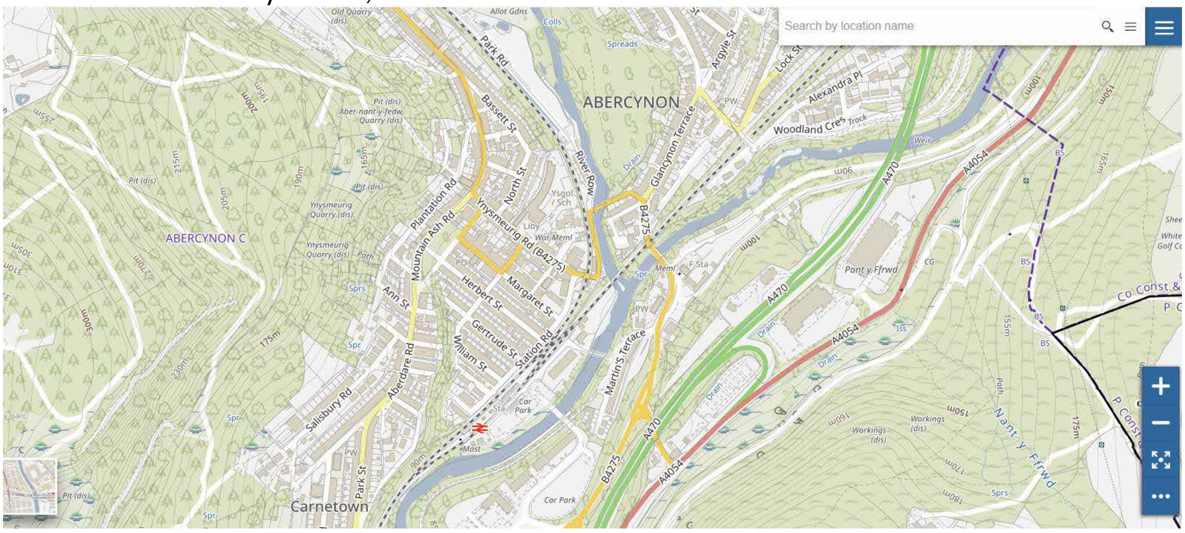
9.91 Parking facilities, together with the presence of bus stops, ensure that Treharris is accessible for visitors using their own vehicle and sustainable modes of travel.

9.92 Whilst Treharris is not pedestrianised, facilities are in place to ensure that the local centre remains pedestrian friendly. Features to ensure Treharris remains pedestrian friendly include, controlled pedestrian crossings and wide accessible pavements.

Abercynon Local/Neighbourhood Centre
Centre Overview

9.93 The settlement of Abercynon is located along the western boundary between Caerphilly CBC and Rhondda Cynon Taf CBC. According to policy NSA 18 (The Retail Hierarchy) of the Rhondda Cynon Taf Local Development Plan 2006 to 2021 (adopted 2011), Abercynon is defined as one of the Local and Neighbourhood Centres. Abercynon is a compact Local and Neighbourhood Centre.

Extract from DataMapWales, Welsh Government Website.



9.94 In addition to offering a variety of retail facilities, local and neighbourhood centres provide a range of facilities and services including employment opportunities, leisure facilities and community facilities.

9.95 There are 17 No. defined Local and Neighbourhood Centres under policy NSA 18.

9.96 Policy NSA 18 states:

"Proposals for retail development or changes of use to Class A retail uses inside the defined boundaries of retail centres, which would maintain or enhance a centre's position in the retail hierarchy will be permitted."

9.97 Abercynon is a mix of A1 and A3 with some vacant units and community services. The majority of retail units (A1 and A3) are located on Margaret Street, creating a linear shopping area.

9.98 The residential units on Margaret Street appeared to be flats that resided above the A1/A3 uses. These residential units benefit from, permit free, on-street parking. To the southeast of Margaret Street there is a designated car park with 2 disabled spaces and 19 standard car parking spaces.

9.99 Based on the fieldwork undertaken by Avison Young on 22nd December 2023, Abercynon was found to contain 55 units. 17 of the units were recorded as convenience businesses.

Diversity of Uses
Convenience Goods

9.100 As Table I shows, the local and neighbourhood centre's convenience sector accounts for 30.9% of all units, with a total of 17 convenience stores recorded. This is above the national average of 9.2%. Abercynon's convenience goods offer comprises of takeaways, cafes/bakeries, and newsagents. Convenience goods were the highest recorded use type when this assessment took place. There is no high-profile store (e.g., Tesco) in the centre of Abercynon.

Comparison Goods

9.101 The site survey found that comparison goods comprise 20% of the 55 recorded units. This figure is well below the national average of 26.8%.

9.102 The comparison goods are concentrated on Margaret Street, with a few retail stores located on Ynysmeurig Road. The comparison goods were clothes stores, charity shops, a cycle stop, and 2 pharmacies.

Table I: Diversity of Uses in Abercynon (surveyed in December 2023)

Use Type	Number of Units (January 2024)	
	No.	%
Convenience	17	30.9%
Comparison	11	20%
Service	11	20%
Miscellaneous	2	3.6%
Vacant	14	25.5%
Total	55	100%

Services (Retail, Leisure and Offices)

9.103 11 of the 55 units within the centre were recorded to be leisure, retail, or business service units. Therefore, service units comprise 20% of all units within the centre. The majority of these units are concentrated on Margaret Street.

Miscellaneous Uses

9.104 Alongside retail outlets, the site survey recorded 2 miscellaneous units (3.6%). 1 of the miscellaneous uses was a doctor's surgery that served the residents of Abercynon and surrounding areas.

Vacant Units

9.105 14 vacant units were recorded, which accounts for 25.5% of commercial units within the centre. This is significantly higher than the national average of 11.2%. Whilst there were gaps in the street scene, the vacant units were not clustered. This level of vacancy did not have a profound impact upon the visual health of the local and neighbourhood centre or impact observed footfall on the day of fieldwork.

Balance Between Independent and Multiple Stores

9.106 As a local and neighbourhood centre, Abercynon is not likely to attract higher profile companies. However, there is significant opportunity for independent companies to grow and profit from the lack of high-profile stores. The percentage of independent stores would be higher in a compact local and neighbourhood centre compared to a principal town centre. This is evident in Abercynon.

Accessibility

9.107 Adequate parking facilities are available within Abercynon with the main car park being adjacent to the community centre. The car park is free and not time/price restrictive. Additionally, non-restrictive on-street parking is widely available which serves both the centre of Abercynon and train station.

9.108 Abercynon station is located to the southwest of Station Road and boasts 450 free car parking space and 7 accessible spaces.

9.109 At the time of the site survey there was a good level of pedestrian activity despite the visit taking place on a Friday morning. The majority of footfall was recorded on Margaret Street.

Environmental Quality

9.110 Abercynon is not pedestrianised. The main route of traffic flows through Margaret Street, where the majority of retail units are located. At the time the fieldwork took place, it was apparent that the traffic contributed significantly to noise pollution.

9.111 To the north of the local and neighbourhood centre, dense populations of trees, on raised topography, are visible from the local and neighbourhood centre. Whilst there are no trees within the immediate vicinity of Abercynon, the surrounding areas are densely vegetated, contributing to the environmental quality.

9.112 The vacancy rates are high, however, not clustered and are not visually intrusive. The vacant units are maintained and not subject to vandalism.

Summary/Conclusions

9.113 Most of the retail units/services are condensed onto one street (Margaret Street) and offer varied services/goods. As a result of the diversity, and ability to carry out small ‘top-up shops’, Abercynon should continue to see high numbers of shoppers. However, it must be noted that neighbouring principal town centres, Merthyr Tydfil and Pontypridd are more likely to be visited for specific shops.

9.114 Our site survey found Abercynon to have a high amount of pedestrian activity (Margaret Street), albeit there are a number of vacant units (above the national average).

9.115 Good parking facilities, together with a train station, ensure that Abercynon is accessible for visitors using their own vehicles and by more sustainable modes of travel (train).

9.116 Whilst Abercynon is not pedestrianised, facilities are in place to ensure that Abercynon remains pedestrian friendly. These facilities include controlled pedestrian crossings and wide accessible pavements. Additionally, litter bins are present to discourage littering, in turn ensuring Abercynon remains pedestrian friendly.

9.117 Abercynon is viewed to be a healthy local and neighbourhood centre, with good accessibility, good environmental quality and good retail and services available.

Conclusions –Retail Impact

9.118 Drawing all of the impact analyses set out within this section of the report together, it is clear that the proposed discount foodstore will not give rise to any significant adverse impacts upon the vitality and viability of any surrounding centre. Whilst the proposed scheme will inevitably divert some retail trade from foodstores within Ystrad Mynach and other centres, these stores are all trading particularly strongly, as is evident from the household survey findings and as a result, the impact of the application scheme is not at a level that will materially affect the viability of any individual stores in surrounding centres, or the vitality or viability of any centre as a whole.

9.119 Nelson local centre is currently not meeting the needs of the surrounding local resident population, evident from the level of expenditure leakage to other centres within Caerphilly. It, alongside Treharris and Abercynon primarily caters for the day-to day needs of residents within a small, localised catchment. The application proposals will allow more expenditure to be retained locally to the benefit of Nelson local centre. No conflict is therefore anticipated with Paragraphs 4.3.26 and 4.3.27 of PPW and TAN4.

10. Conclusion

10.1 This Planning and Retail Statement is submitted in support of an application for the demolition of an existing foodstore and the development of a new foodstore for Aldi Stores Limited on a previously developed site within an established urban area, in a prominent and sustainable location.

10.2 The site lies within the settlement boundary of Nelson, as defined by Policy SP5 of the Caerphilly County Borough Council's Local Development Plan up to 2021 (adopted 2010). Additionally, the site is located within the Northern Connections Corridor, as defined by LDP Policy SP2. The site currently accommodates a Co-Op foodstore, clearly showing that there is existing infrastructure that would support a new food store that meets the demands of the local centre.

10.3 The proposal provides the opportunity to deliver a modern discount foodstore on brownfield land. The site is currently occupied by the Co-op foodstore and some of the existing infrastructure will be utilised as part of this proposal. The proposal will bring with it economic benefits, including job creation, and ultimately contribute to the area's regeneration.

10.4 The provision of a discount foodstore will also provide a valuable service to the local community. Added to that, the site benefits from a good means of access for the public and deliveries alike which makes it a good location for a retail foodstore and it is accessible by a choice of means of transport.

10.5 The proposed development site will realise a number of benefits, including the following:

- The proposal will include more efficient access and space utilisation as well as include a more modern design. The regeneration of a longstanding retail unit, located on brownfield land, with a new, modern discount foodstore, will represent an improvement to the visual amenity of the area as a whole.

- The proposals represent a multi-million pound investment in the area, deliverable in the short-term and which would regenerate a prominent brownfield site.

- The proposal will also deliver a low-cost shopping offer to those living locally.

- There will be an improved level of car parking and access arrangements to the site with potential to enhance the sustainability of shopping trips to reach a discount foodstore.

- The landscape proposals will enable significant biodiversity enhancements.

- A number of sustainable enhancement measures are proposed to be included in the Travel Plan, including the provision of cycle parking, electric vehicle charging points, provision of a Travel Packs etc.

- Once complete, the new foodstore will generate employment opportunities in Nelson, offering a requirement for full and part-time staff who will be sourced from the local area (jobs will also be created during construction).

10.6 We have carried out an assessment of potential impacts arising from the provision of a new foodstore and the associated increase in convenience goods floorspace. We have not done the same for the increase in comparison goods floorspace given its very small scale and turnover, and that Aldi's non-food offer varies from week to week so that any impacts are transient. We have concluded that there will be no significant adverse impacts on any centre.

10.7 We have considered whether there are any more centrally located sites or premises that may be suitable and available to accommodate the development that is proposed, taking into account Aldi's business model, which legitimately limits the extent to which Aldi may be 'flexible' in the application of the sequential approach.

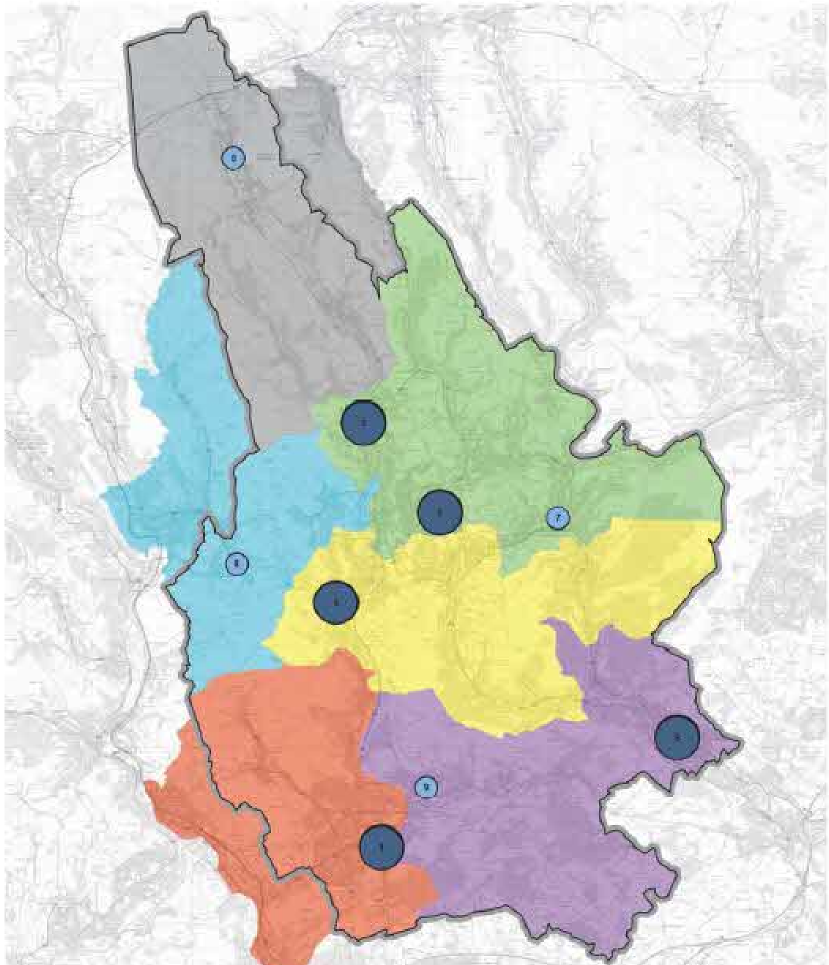
10.8 The proposals will not result in any detrimental harm to the visual amenity of the area or the amenity of nearby residents and neither would they harm matters of highway safety, ecology, noise, archaeology, or air quality. The proposed landscaping scheme, including native planting, as well as the proposed ecological enhancements proposed will contribute positively to the biodiversity of the area. Indeed, the development of this modern retail unit is considered to be a positive addition to the visual appearance of the area and represents a significant investment in the locality.

10.9 Overall, we conclude that the relevant retail policy tests in the development plan and national policy are met fully by the proposal. Need is demonstrable, no harmful impact will arise, and there are no more centrally located opportunities to accommodate the development that is proposed. The proposed development comprises sustainable development which meets all relevant policy tests set out in the development plan, PPW and its accompanying Technical Advice Notes. It is therefore concluded that the application should be granted planning permission.

Appendix I

Retail Assessment Plan showing Council Retail Study Zones and Primary Catchment

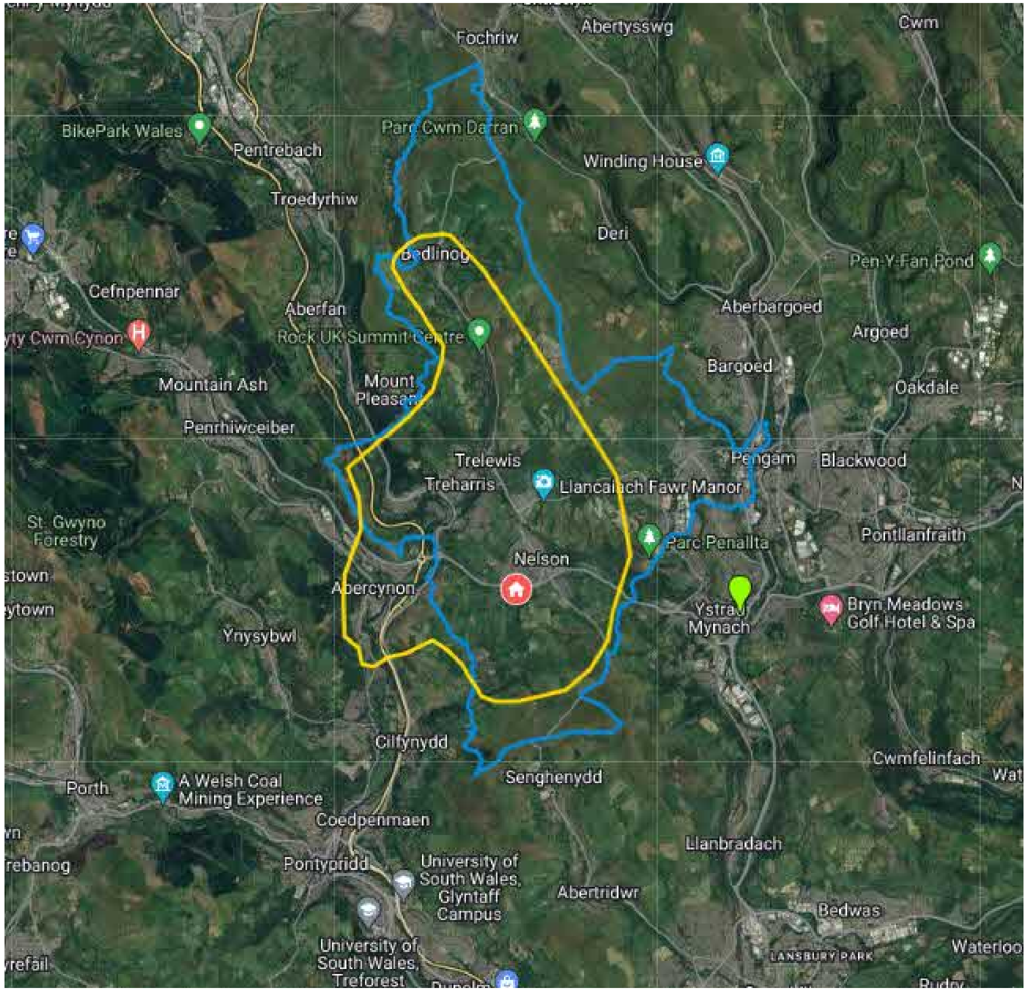
Proposed Aldi Foodstore –MafonRoad, Nelson
Primary Catchment Area Plan



Extract from CCBC Retail Capacity Study 2022 –Appendix 1

Key

- Caerphilly Local Authority Boundary
- Zone 1
- Zone 2
- Zone 3
- Zone 4
- Zone 5
- Zone 6
- Principal Town Centre
  1. Caerphilly
  2. Bargoed
  3. Blackwood
  4. Ystrad Mynach
  5. Risca/Pontymister
- Local Centre
  6. Rhymney
  7. Newbridge
  8. Nelson
  9. Bedwas



Maps data, Google ©2024

- The Site
- **Primary Catchment Area -** (adjusted 7 minuteoff-peak drivetime)
- **Zone 3 Boundary**

Appendix II

Retail Assessment Plan showing Primary Catchment Area in the context of allocated centres and existing convenience provision

Proposed Aldi Foodstore – MafonRoad, Nelson
Retail Assessment Plan

AVISON YOUNG

Key

Proposed Aldi Foodstore – MafonRoad, Nelson

Primary Catchment Area –
(adjusted 7 minuteoff-peak drivetime)

Allocated Centres

1 Nelson Local Centre

2 Treharris Local Centre

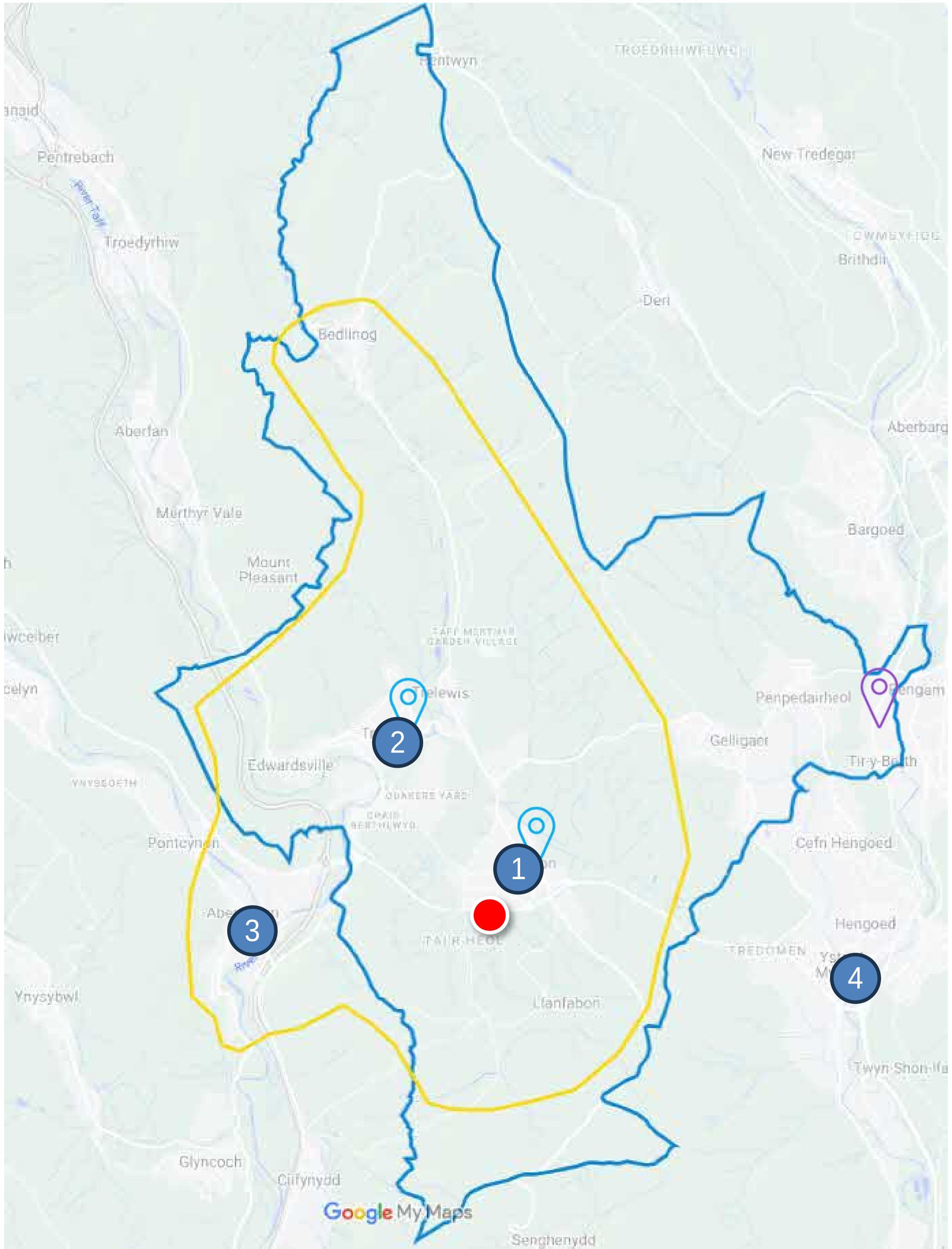
3 Abercynon Local / Neighbourhood Centre

4 Ystrad Mynach Principal Town Centre

Convenience Retailers and location

Aldi

Co-op



Appendix III

Retail Capacity and Impact Tables

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

TABLE 1. TURNOVER OF PROPOSED DEVELOPMENT

Proposed new Aldi foodstore, Former Co op Store, Mafon Road, Nelson		Gross Floorspace (sq. m)	Net Floorspace (sq. m)	Turnover per sq. m in 2024 (£m)	Period to Test Year			
					2024	2025	2026	2027
Proposed Aldi Foodstore	Convenience	2,000	1,085	£11,028	£11.96	£11.98	£11.99	£12.00
	Comparison		271	£7,487	£2.03	£2.07	£2.11	£2.15
	Total		1,356	-	£13.99	£14.05	£14.10	£14.15

Notes:

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

b. Net sales area and convenience goods / comparison goods floorspace split of Aldi provided by operator

c. Sales density for Aldi derived from GlobalData 'Convenience and Comparison Goods Sales Densities of Major Grocers' (2022 Edition), published June 2023

d. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b (Page 15) of Experian Retail Planner Briefing Note 20 (February 2023)

2020 Prices

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

TABLE 2(a): POPULATION WITHIN EACH ZONE

ZONE	POPULATION			
	2024	2025	2026	2027
Retail Study Zone 1 - Caerphilly	51080	51154	51227	51299
Retail Study Zone 2 - Risca / Pontymister	30785	30801	30808	30809
Retail Study Zone 3 (PCA) - Nelson	22045	22089	22107	22129
Retail Study Zone 4 - Ystrad Mynach	30952	31007	31032	31041
Retail Study Zone 5 - Bargoed / Blackwood	48409	48404	48428	48463
Retail Study Zone 6 - Rhymney	21,864	21,854	21,855	21,820
TOTAL	205,135	205,309	205,457	205,561

Notes:

a. Study Area based on Caerphilly Retail Capacity Study (August 2022). Zone 3 represents the scheme's Primary Catchment Area (PCA)

b. Base population derived from Experian Location Analyst data (Jan 2024 Report)

c. Base year taken as 2024 and test/design year as 2027

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

ZONE	CONVENIENCE GOODS EXPENDITURE PER HEAD (EXCLUDING NSRT DEDUCTION)			
	2024	2025	2026	2027
Retail Study Zone 1 - Caerphilly	£2,285	£2,285	£2,287	£2,289
Retail Study Zone 2 - Risca / Pontymister	£2,351	£2,351	£2,353	£2,356
Retail Study Zone 3 (PCA) - Nelson	£2,271	£2,271	£2,273	£2,275
Retail Study Zone 4 - Ystrad Mynach	£2,233	£2,233	£2,235	£2,238
Retail Study Zone 5 - Bargoed / Blackwood	£2,238	£2,238	£2,240	£2,242
Retail Study Zone 6 - Rhymney	£2,153	£2,153	£2,155	£2,157
ANNUAL GROWTH	-0.4%	0.0%	0.1%	0.1%

Notes:

a. Per capita expenditure derived from Experian Location Analyst data (Jan 2024 Report)

b. Per capita expenditure projected forward using forecast growth rates taken from Figure 7, Appendix 3 of Experian Retail Planner Briefing Note 20 (February 2023)

2020 Prices

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

ZONE	CONVENIENCE GOODS EXPENDITURE PER HEAD (INCLUDING NSRT DEDUCTION)			
	2024	2025	2026	2027
Retail Study Zone 1 - Caerphilly	£2,150	£2,143	£2,141	£2,138
Retail Study Zone 2 - Risca / Pontymister	£2,212	£2,205	£2,203	£2,200
Retail Study Zone 3 (PCA) - Nelson	£2,137	£2,130	£2,127	£2,125
Retail Study Zone 4 - Ystrad Mynach	£2,101	£2,095	£2,092	£2,090
Retail Study Zone 5 - Bargoed / Blackwood	£2,106	£2,099	£2,096	£2,094
Retail Study Zone 6 - Rhymney	£2,026	£2,019	£2,017	£2,015
ANNUAL DEDUCTION	5.9%	6.2%	6.4%	6.6%

Notes:

a. Per capita expenditure derived from Experian Location Analyst data (Jan 2024 Report)

b. Expenditure excludes Non Store Retail Trade in line with 'adjusted' allowance derived from Figure 5, Appendix 3 of Experian Retail Planner Briefing Note 20 (Feb 2023)

2020 Prices

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

ZONE	TOTAL CONVENIENCE GOODS EXPENDITURE (£M)			
	2024	2025	2026	2027
Retail Study Zone 1 - Caerphilly	£109.83	£109.63	£109.67	£109.70
Retail Study Zone 2 - Risca / Pontymister	£68.10	£67.92	£67.86	£67.78
Retail Study Zone 3 (PCA) - Nelson	£47.10	£47.05	£47.03	£47.02
Retail Study Zone 4 - Ystrad Mynach	£65.04	£64.95	£64.93	£64.87
Retail Study Zone 5 - Bargoed / Blackwood	£101.93	£101.59	£101.53	£101.49
Retail Study Zone 6 - Rhymney	£44.29	£44.13	£44.08	£43.96
TOTAL	£436.29	£435.27	£435.10	£434.82

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)

2020 Prices

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT
TABLE 3: CONVENIENCE GOODS SHOPPING PATTERNS (%)

STORE/ CENTRE	FIRST CHOICE MAIN FOOD SHOPPING ZONE						SECOND CHOICE MAIN FOOD SHOPPING ZONE						TOP UP FOOD SHOPPING ZONE					
	1	2	3	4	5	6	1	2	3	4	5	6	1	2	3	4	5	6
ZONE 3 - NELSON (PRIMARY CATCHMENT AREA)																		
NELSON LOCAL CENTRE	**0.0%**	**0.0%**	**7.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**26.8%**	**0.0%**	**1.5%**	**2.0%**
Co-op, Commercial Street, Nelson	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	17.9%	0.0%	0.0%	0.0%
Co-op, Mafon Road, Nelson	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	1.5%	2.0%
Local Shops, Local Centre																		
TREHARRIS LOCAL CENTRE	**0.0%**	**0.0%**	**3.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**14.3%**	**0.0%**	**0.0%**	**0.0%**
Co-op, Fox Street, Treharris	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	0.0%
Local Shops, 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%	5.4%	0.0%	0.0%	0.0%
OTHER (OUT OF CENTRE)	**0.0%**	**0.0%**	**11.9%**	**7.0%**	**4.6%**	**1.4%**	**0.0%**	**0.0%**	**10.9%**	**3.0%**	**1.7%**	**6.7%**	**0.0%**	**0.0%**	**16.1%**	**0.0%**	**1.5%**	**0.0%**
Local Shops, Bedlinog	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%
Local Shops, Gelligaer	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%	1.8%	0.0%	0.0%	0.0%
Aldi, New Road, Tirybeth	0.0%	0.0%	9.0%	7.0%	4.6%	1.4%	0.0%	0.0%	10.9%	3.0%	1.7%	6.7%	0.0%	0.0%	3.6%	0.0%	1.5%	0.0%
ZONE 3 TOTAL	**0.0%**	**0.0%**	**22.4%**	**7.0%**	**4.6%**	**1.4%**	**0.0%**	**0.0%**	**15.2%**	**3.0%**	**1.7%**	**6.7%**	**0.0%**	**0.0%**	**57.1%**	**0.0%**	**3.0%**	**2.0%**
ZONE 1 - CAERPHILLY																		
CAERPHILLY PRINCIPAL TOWN CENTRE	**18.0%**	**13.7%**	**0.0%**	**1.0%**	**0.7%**	**0.0%**	**29.5%**	**17.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**24.5%**	**14.4%**	**1.8%**	**0.0%**	**0.0%**	**0.0%**
Heron Frozen Foods, Castle Court Shopping Centre, Caerphilly	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Iceland, Cardiff Road, Caerphilly	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	4.1%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Castle Court, Caerphilly	15.0%	11.8%	0.0%	1.0%	0.0%	0.0%	23.2%	13.7%	0.0%	0.0%	0.0%	0.0%	17.6%	10.0%	1.8%	0.0%	0.0%	0.0%
Local Shops, Primary Town Centre	0.0%	2.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	2.2%	0.0%	0.0%	0.0%	0.0%
GALLAGHER RETAIL WAREHOUSE PARK	**14.4%**	**16.7%**	**4.5%**	**0.0%**	**0.7%**	**0.0%**	**19.6%**	**8.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**14.7%**	**8.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Aldi, Gallagher Retail Park, Caerphilly	7.8%	6.9%	1.5%	0.0%	0.7%	0.0%	13.4%	2.7%	0.0%	0.0%	0.0%	0.0%	9.8%	3.3%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Gallagher Retail Park, Caerphilly	6.6%	9.8%	3.0%	0.0%	0.0%	0.0%	6.3%	5.5%	0.0%	0.0%	0.0%	0.0%	4.9%	5.6%	0.0%	0.0%	0.0%	0.0%
OTHER (OUT OF CENTRE)	**58.7%**	**16.7%**	**3.0%**	**3.0%**	**2.0%**	**2.8%**	**44.6%**	**8.2%**	**4.3%**	**4.5%**	**5.0%**	**2.2%**	**48.0%**	**13.3%**	**0.0%**	**2.4%**	**0.0%**	**0.0%**
Aldi, Midway Retail Park, Upper Boat, Pontypridd	1.8%	0.0%	1.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	2.2%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%
Asda, Pontygwindy Road, Caerphilly	35.3%	12.7%	0.0%	1.0%	0.7%	1.4%	25.0%	5.5%	2.2%	4.5%	3.3%	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%
B&M Bargains, Bedwas Road, Caerphilly	0.0%	2.0%	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%
Lidl, Beddau Way, off Nantgarw Road, Caerphilly	15.6%	2.0%	0.0%	0.0%	0.0%	1.4%	11.6%	2.7%	0.0%	0.0%	0.0%	0.0%	12.7%	4.4%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Brynhyfryd Road, Caerphilly	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Castle View, Caerphilly	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	12.7%	2.2%	0.0%	0.0%	0.0%	0.0%
Co-op, Commercial Road, Machen, Caerphilly	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%	4.4%	0.0%	0.0%	0.0%	0.0%
Home Bargains, Pontygwindy Road, Caerphilly	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%	2.2%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Gelli Hirion Industrial Estate, Pontypridd	0.6%	0.0%	1.5%	0.0%	1.3%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Home Bargains, Midway Retail Park, Pontypridd	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%	0.0%
The Food Warehouse, Midway Retail Park, Pontypridd	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%	0.0%
Local Shops, Taff's Well	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Abertridwr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Llanbradach	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONE 1 TOTAL	**91.0%**	**47.1%**	**7.5%**	**4.0%**	**3.3%**	**2.8%**	**93.8%**	**34.2%**	**4.3%**	**4.5%**	**5.0%**	**2.2%**	**87.3%**	**36.7%**	**1.8%**	**2.4%**	**0.0%**	**0.0%**
ZONE 2 - RISCA / PONTYMISTER																		
RISCA/PONTYMISTER PRINCIPAL TOWN CENTRE	**0.0%**	**3.9%**	**0.0%**	**5.0%**	**1.3%**	**0.0%**	**0.0%**	**11.0%**	**0.0%**	**3.0%**	**0.0%**	**0.0%**	**0.0%**	**21.1%**	**0.0%**	**2.4%**	**2.3%**	**0.0%**
Lidl, Commercial Street, Risca	0.0%	3.9%	0.0%	3.0%	1.3%	0.0%	0.0%	11.0%	0.0%	3.0%	0.0%	0.0%	0.0%	11.1%	0.0%	2.4%	0.8%	0.0%
Local Shops, Primary Town Centre	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	1.5%	0.0%
BEDWAS 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%**	**2.9%**	**3.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Co-op, Church Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	2.2%	0.0%	0.0%	0.0%	0.0%
Local Shops, 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%	1.1%	0.0%	0.0%	0.0%	0.0%
OTHER (OUT OF CENTRE)	**0.0%**	**41.2%**	**0.0%**	**5.0%**	**1.3%**	**0.0%**	**0.0%**	**30.1%**	**0.0%**	**9.1%**	**5.0%**	**0.0%**	**0.0%**	**24.4%**	**0.0%**	**6.0%**	**1.5%**	**0.0%**
Aldi, Pontymister Industrial Estate / Interchange, Risca	0.0%	13.7%	0.0%	1.0%	0.7%	0.0%	0.0%	13.7%	0.0%	3.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Riverbank Newport Road, Caerphilly	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%	2.2%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Pontymister Industrial Estate, Pontymister	0.0%	27.5%	0.0%	4.0%	0.7%	0.0%	0.0%	16.4%	0.0%	6.1%	5.0%	0.0%	0.0%	12.2%	0.0%	6.0%	1.5%	0.0%
Local Shops, Crosskeys Village 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%	4.4%	0.0%	0.0%	0.0%	0.0%
ZONE 2 TOTAL	**0.0%**	**45.1%**	**0.0%**	**10.0%**	**2.6%**	**0.0%**	**0.0%**	**41.1%**	**0.0%**	**12.1%**	**5.0%**	**0.0%**	**2.9%**	**48.9%**	**0.0%**	**8.3%**	**3.8%**	**0.0%**
ZONE 4 - YSTRAD MYNACH / HENGOED																		
YSTRAD MYNACH PRINCIPAL TOWN CENTRE	**1.2%**	**0.0%**	**38.8%**	**28.0%**	**7.2%**	**4.2%**	**0.0%**	**0.0%**	**26.1%**	**30.3%**	**5.8%**	**0.0%**	**0.0%**	**0.0%**	**17.9%**	**32.1%**	**0.0%**	**0.0%**
Lidl, Penglam Road, Ystrad Mynach	0.0%	0.0%	10.4%	10.0%	2.0%	2.8%	0.0%	0.0%	13.0%	9.1%	2.5%	0.0%	0.0%	0.0%	5.4%	10.7%	0.0%	0.0%
Tesco Superstore, New Road, Ystrad Mynach	1.2%	0.0%	28.4%	18.0%	5.2%	1.4%	0.0%	0.0%	13.0%	21.2%	3.3%	0.0%	0.0%	0.0%	12.5%	16.7%	0.0%	0.0%
Local Shops, Primary Town 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%	4.8%	0.0%	0.0%
OTHER (OUT OF CENTRE)	0.0%	0.0%	0.0%	15.0%	11.1%	0.0%	0.0%	0.0%	0.0%	12.1%	8.3%	0.0%	0.0%	0.0%	1.8%	26.2%	9.8%	0.0%
Sainsbury's, Newbridge Rd, Pontllanfraith/Blackwood	0.0%	0.0%	0.0%	15.0%	11.1%	0.0%	0.0%	0.0%	0.0%	12.1%	7.4%	0.0%	0.0%	0.0%	0.0%	16.7%	5.3%	0.0%
One Stop, Penllwyn / Pontllanfraith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Local Shops, Pontllanfraith	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%	7.1%	0.0%	0.0%
Local Shops, Abercarn	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%	0.0%
Local Shops, Hengoed	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%	1.8%	2.4%	1.5%	0.0%
Local Shops, Cwmcarn	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%	0.0%
Local Shops, Cwmfelinfach	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%	0.0%
Local Shops, Maesycwmmer	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%	2.3%	0.0%
ZONE 4 - TOTAL	**1.2%**	**0.0%**	**38.8%**	**43.0%**	**18.3%**	**4.2%**	**0.0%**	**0.0%**	**26.1%**	**42.4%**	**14.0%**	**0.0%**	**0.0%**	**0.0%**	**19.6%**	**58.3%**	**9.8%**	**0.0%**
ZONE 5 - BARGOED / BLACKWOOD																		
BARGOED PRINCIPAL TOWN CENTRE	**0.0%**	**0.0%**	**3.0%**	**3.0%**	**15.0%**	**15.3%**	**0.0%**	**0.0%**	**6.5%**	**4.5%**	**19.8%**	**17.8%**	**0.0%**	**0.0%**	**3.6%**	**4.8%**	**14.4%**	**18.0%**
Iceland, Hanbury Road, Bargoed	0.0%	0.0%	0.0%	3.0%	2.0%	4.2%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	2.4%	3.8%	0.0%
Morrisons, Bargoed Gateway, Bargoed	0.0%	0.0%	3.0%	0.0%	13.1%	11.1%	0.0%	0.0%	6.5%	4.5%	15.7%	17.8%	0.0%	0.0%	3.6%	2.4%	10.6%	16.0%
Local Shops, Primary Town 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%	2.0%
BLACKWOOD PRINCIPAL TOWN CENTRE	0.0%	0.0%	3.0%	16.0%	31.4%	8.3%	0.0%	0.0%	17.4%	18.2%	35.5%	0.0%	2.9%	0.0%	0.0%	6.0%	22.0%	0.0%
Asda, Blackwood Retail Park, Cliff Road, Blackwood	0.0%	0.0%	3.0%	13.0%	30.7%	8.3%	0.0%	0.0%	17.4%	12.1%	28.1%	0.0%	2.9%	0.0%	0.0%	4.8%	7.6%	0.0%
Iceland, Islwyn Centre, Blackwood	0.0%	0.0%	0.0%	3.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.5%	5.8%	0.0%	0.0%	0.0%	0.0%	1.2%	9.1%	0.0%
B&M Bargains, Cliff Road, Blackwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Farmfoods, Blackwood Retail Park, Blackwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Local Shops, Primary Town 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%	3.0%	0.0%
NEWBRIDGE 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%	3.8%	0.0%
Local Shops, 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%	3.8%	0.0%
BLACKWOOD GATE RETAIL WAREHOUSE PARK	0.0%	0.0%	4.5%	12.0%	16.3%	1.4%	0.0%	0.0%	6.5%	6.1%	12.4%	4.4%	0.0%	0.0%	5.4%	4.8%	5.3%	0.0%
Aldi, Blackwood Gate Retail Park, Blackwood	0.0%	0.0%	4.5%	12.0%	16.3%	1.4%	0.0%	0.0%	6.5%	6.1%	10.7%	4.4%	0.0%	0.0%	5.4%	1.2%	5.3%	0.0%
Home Bargains, Blackwood Gate Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%
OTHER (OUT OF CENTRE)	0.0%	0.0%	1.5%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	8.3%	32.6%	4.0%
Tesco Express, Highfield Way, Blackwood	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	12.9%	0.0%
Co-op, Central Buildings, Oakdale	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%	2.4%	3.8%	0.0%
One Stop, Markham	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%	1.2%	2.3%	0.0%
Local Shops, Pengam	0.0%	0.0%	1.5%	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%
Local Shops, Aberbargoed	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%	1.8%	0.0%	1.5%	4.0%
Local Shops, Cefn Fforest	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%	2.3%	0.0%
Local Shops, Croespenmaen	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%	0.8%	0.0%
Local Shops, Crumlin	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%	3.0%	0.0%
Local Shops, Gilfach	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%	2.3%	0.0%
Local Shops, Markham	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%	2.3%	0.0%
Local Shops, Pentwyn-mawr	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%	0.8%	0.0%
Local Shops, Treowen	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%	0.8%	0.0%
ZONE 5 TOTAL	**0.0%**	**0.0%**	**11.9%**	**31.0%**	**64.1%**	**25.0%**	**0.0%**	**0.0%**	**30.4%**	**28.8%**	**67.8%**	**22.2%**	**2.9%**	**0.0%**	**10.7%**	**23.8%**	**78.0%**	**22.0%**
ZONE 6 - RHYMNEY																		
RHYMNEY 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%	10.0%
Premier, Rhymney	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%	0.0%
Local Shops, 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%	10.0%
TREDEGAR DISTRICT TOWN CENTRE	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**8.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**14.0%**
Farmfoods, Gwent Shopping Centre, Tredegar	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%	2.0%
Lidl, Gelli Road, Tredegar	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%
Home Bargains, Tredegar	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%	0.0%
Local Shops, District Town 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%	2.0%
OTHER (OUT OF 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%**	**10.0%**
Premier, Christie's Fayre, Pontlottyn	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%	0.0%
Local Shops, Pontlottyn	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%	2.0%
Local Shops, New Tredegar	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%	8.0%
ZONE 6 TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**8.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**34.0%**
BEYOND STUDY AREA	**7.8%**	**7.8%**	**19.4%**	**5.0%**	**7.2%**	**62.5%**	**6.3%**	**24.7%**	**23.9%**	**9.1%**	**6.6%**	**60.0%**	**6.9%**	**14.4%**	**10.7%**	**7.1%**	**5.3%**	**42.0%**
Aldi, Caerphilly Road, Cardiff	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Plymouth Street, Merthyr Tydfil	0.0%	0.0%	1.5%	0.0%	0.0%	1.4%	0.0%	0.0%	2.2%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	1.5%	4.0%
Aldi, The Walk, Ebbw Vale	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%	0.0%
Asda, Dowlais Top, Merthyr Tydfil	0.0%	0.0%	6.0%	0.0%	0.0%	37.5%	0.0%	0.0%	2.2%	0.0%	0.0%	20.0%	0.0%	0.0%	3.6%	0.0%	0.0%	16.0%
Asda, Llewellyn Road, Torfaen, Cwmbran	0.0%	0.0%	0.0%	0.0%	3.3%	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%
Asda, Longwood Drive, Cardiff	0.6%	0.0%	3.0%	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%
Asda, Lower Dock Street, Newport	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%	0.0%
Asda, Pencarn Way, Duffryn, Newport	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Brown Street, Merthyr Tydfil	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%	0.0%
Iceland, High Street, Abertillery	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%	0.0%
Iceland, St Tydfil Square Shopping Centre, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Maindy Road, Cardiff	0.0%	2.0%	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%
Lidl, Penygarnddu Industrial Estate, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%
M&S Foodhall, Culverhouse Cross, Cardiff	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
M&S Foodhall, Cyfarthfa Retail Park, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
M&S Simply Food, Ty Glas Road, Cardiff	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Azalea Road, Rogerstone	0.0%	2.9%	0.0%	1.0%	0.7%	0.0%	0.0%	6.8%	0.0%	1.5%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Morrisons, Beaufort Road, Ebbw Vale	0.6%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.8%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%
Morrisons, Park Road, Abergavenny	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%	0.0%
Morrisons, Pontypridd Road, Porth	0.0%	2.0%	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%
Morrisons, Ty Glas Road, Cardiff	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, 123-127 Woodville Road, Cardiff	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%	0.0%
Sainsbury's Local, Heol Llanishen Fach, Cardiff	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Colchester Avenue, Pen-y-lan, Cardiff	0.0%	0.0%	0.0%	0.0%	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%	0.0%
Sainsbury's Superstore, Excalibur Drive, Cardiff	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Pontypridd Retail Park, Pontypridd	0.6%	0.0%	3.0%	1.0%	1.3%	0.0%	0.0%	5.5%	6.5%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Culverhouse Cross, Cardiff	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Tesco Superstore, Depot Road, Aberdare	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, North West Approach, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Barrack Hill, Shaftsbury St, Newport NP20 5GN	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
B&M Bargains, 92 Taff Street, Pontypridd	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Abergavenny	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Culverhouse Cross, Cardiff	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Commercial Street, Newport	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Gadlys Road, Aberdare	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Grange Road, Cwmbran	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Newport Road, Cardiff	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%	0.0%
Morrisons, Orb Drive, Newport	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Albany Street, Newport	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%	0.0%
Tesco Extra, Spytty Road, Newport	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Station Yard, Merthyr Tydfil	0.0%	0.0%	4.5%	0.0%	0.0%	2.8%	0.0%	0.0%	8.7%	0.0%	0.0%	4.4%	0.0%	0.0%	1.8%	0.0%	0.0%	2.0%
Tesco Superstore, Lower Bridge Street, Pontypool	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	2.5%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%
Asda, Lakeside Retail Park, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%
Co-op, Windsor Road, Pontypool	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Sainsbury's Local, Unit 35, Sovereign Arcade, Newport	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%	2.2%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Excelsior Road, Cardiff	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Harlech Retail Park, Newport	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%	2.2%	0.0%	0.0%	0.0%	0.0%
Waitrose, Croescadam Close, Cardiff	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Saundersfoot	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%	3.6%	0.0%	0.0%	0.0%
B&M Bargains, Dowlais Top Retail Park, Merthyr Tydfil	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%	4.0%
B&M Bargains, Rhyd-Y-Blew, Ebbw Vale	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%	2.0%
Rogerstone Village Centre	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	2.4%	0.0%	0.0%
Local Shops, Abergavenny Town 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%	0.0%
Local Shops, Cardiff City 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%	1.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Local Shops, Cwmbran Town 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%	2.4%	0.0%	0.0%
Local Shops, Newport City 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%	0.0%
Gaer Park, Newport	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%	0.8%	0.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.00%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note
Market shares taken from April 2022 household survey undertaken for the Caerphilly Retail Capacity Study (October 2022), with 'Internet' and 'Don't Know' responses removed.
Adjustments made to Retail Capacity Study zone locations of Aldi Tir y Berth (Zone 3) and Sainsbury's Blackwood (Zone 4) stores for accuracy.

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

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

STORE/CENTRE	FIRST CHOICE MAIN FOOD SHOPPING							SECOND CHOICE MAIN FOOD SHOPPING							TOP UP FOOD SHOPPING							TOTAL
	1	2	3	4	5	6	ZONES 1 6 TOTAL	1	2	3	4	5	6	ZONES 1 6 TOTAL	1	2	3	4	5	6	ZONES 1 6 TOTAL	
(£m)	109.8	68.1	47.1	65.0	101.9	44.3	436.3	109.8	68.1	47.1	65.0	101.9	44.3	436.3	109.8	68.1	47.1	65.0	101.9	44.3	436.3	
(£m)	53.8	33.4	23.1	31.9	49.9	21.7	213.8	23.1	14.3	9.9	13.7	21.4	9.3	91.6	32.9	20.4	14.1	19.5	30.6	13.3	130.9	
ZONE 3 - NELSON																						
NELSON LOCAL CENTRE	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£3.8	£0.0	£0.5	£0.3	£4.5	£6.7
Co-op, Commercial Street, Nelson	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0	2.5	£3.4
Co-op, Mafon Road, Nelson	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£1.3	£0.0	£0.5	£0.3	2.0	£3.2
Local Shops, 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	£0.0	£0.0	£0.0	0.0	£0.0
TREHARRIS LOCAL CENTRE	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	2.0	£2.7
Co-op, Fox Street, Treharris	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	1.3	£2.0
Local Shops, 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	£0.8	£0.0	£0.0	£0.0	0.8	£0.8
OTHER (OUT OF CENTRE)	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£1.1	£0.4	£0.4	£0.6	£2.5	£0.0	£0.0	£2.3	£0.0	£0.5	£0.0	2.7	£5.9
Local Shops, Bedlinog	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	1.5	£2.2
Local Shops, Gelligaer	£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	£0.3	£0.0	£0.0	£0.0	0.3	£0.3
Aldi, New Road, Tiryberth	£0.0	£0.0	£2.1	£2.2	£2.3	£0.3	£6.9	£0.0	£0.0	£1.1	£0.4	£0.4	£0.6	£2.5	£0.0	£0.0	£0.5	£0.0	£0.5	£0.0	1.0	£10.3
ZONE 3 TOTAL	£0.0	£0.0	£3.1	£0.0	£0.0	£0.0	£3.1	£0.0	£0.0	£1.5	£0.4	£0.4	£0.6	£2.9	£0.0	£0.0	£8.1	£0.0	£0.9	£0.3	9.3	£15.3
ZONE 1 - CAERPHILLY																						
CAERPHILLY PRINCIPAL TOWN CENTRE	£9.7	£4.6	£0.0	£0.3	£0.3	£0.0	£14.9	£6.8	£2.5	£0.0	£0.0	£0.0	£0.0	£9.3	£8.1	£3.0	£0.3	£0.0	£0.0	£0.0		£24.2
Heron Frozen Foods, Castle Court Shopping Centre, Caerphilly	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	0.5	£1.4
Iceland, Cardiff Road, Caerphilly	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.4	£0.6	£0.0	£0.0	£0.0	£0.0	£2.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	0.6	£3.3
Morrisons, Castle Court, Caerphilly	£8.1	£3.9	£0.0	£0.3	£0.0	£0.0	£12.3	£5.4	£2.0	£0.0	£0.0	£0.0	£0.0	£7.3	£5.8	£2.0	£0.3	£0.0	£0.0	£0.0	8.1	£27.7
Local Shops, Primary Town Centre	£0.0	£0.7	£0.0	£0.0	£0.3	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.5	£0.0	£0.0	£0.0	£0.0	2.1	£3.0
GALLAGHER RETAIL WAREHOUSE PARK	£7.7	£5.6	£1.0	£0.0	£0.3	£0.0	£14.7	£4.5	£1.2	£0.0	£0.0	£0.0	£0.0	£5.7	£4.8	£1.8	£0.0	£0.0	£0.0	£0.0	6.7	£27.0
Aldi, Gallagher Retail Park, Caerphilly	£4.2	£2.3	£0.3	£0.0	£0.3	£0.0	£7.2	£3.1	£0.4	£0.0	£0.0	£0.0	£0.0	£3.5	£3.2	£0.7	£0.0	£0.0	£0.0	£0.0	3.9	£14.5
Tesco Superstore, Gallagher Retail Park, Caerphilly	£3.5	£3.3	£0.7	£0.0	£0.0	£0.0	£7.5	£1.4	£0.8	£0.0	£0.0	£0.0	£0.0	£2.2	£1.6	£1.1	£0.0	£0.0	£0.0	£0.0	2.8	£12.5
OTHER (OUT OF CENTRE)	£31.6	£5.6	£0.7	£1.0	£1.0	£0.6	£40.4	£10.3	£1.2	£0.4	£0.6	£1.1	£0.2	£13.8	£15.8	£2.7	£0.0	£0.5	£0.0	£0.0	19.0	£73.2
Aldi, Midway Retail Park, Upper Boat, Pontypridd	£1.0	£0.0	£0.3	£0.6	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.6	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	0.5	£3.0
Asda, Pontygwindy Road, Caerphilly	£19.0	£4.3	£0.0	£0.3	£0.3	£0.3	£24.2	£5.8	£0.8	£0.2	£0.6	£0.7	£0.0	£8.1	£3.6	£0.0	£0.0	£0.0	£0.0	£0.0	3.6	£35.9
B&M Bargains, Bedwas Road, Caerphilly	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£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	£0.0	0.0	£0.7
Lidl, Beddau Way, off Nantgarw Road, Caerphilly	£8.4	£0.7	£0.0	£0.0	£0.0	£0.3	£9.3	£2.7	£0.4	£0.0	£0.0	£0.0	£0.0	£3.1	£4.2	£0.9	£0.0	£0.0	£0.0	£0.0	5.1	£17.5
Tesco Express, Brynhyfryd Road, Caerphilly	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	1.6	£4.3
Tesco Express, Castle View, Caerphilly	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£4.2	£0.5	£0.0	£0.0	£0.0	£0.0	4.7	£6.2
Co-op, Commercial Road, Machen, Caerphilly	£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	£0.9	£0.0	£0.0	£0.0	£0.0	0.9	£0.9
Home Bargains, Pontygwindy Road, Caerphilly	£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	£0.5	£0.0	£0.0	£0.0	£0.0	0.5	£0.5
Tesco Extra, Gelli Hirion Industrial Estate, Pontypridd	£0.3	£0.0	£0.3	£0.0	£0.7	£0.0	£1.3	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	0.3	£2.5
Home Bargains, Midway Retail Park, Pontypridd	£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	£0.0	£0.0	£0.0	0.0	£0.0
The Food Warehouse, Midway Retail Park, Pontypridd	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, Taff's Well	£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	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	0.3	£0.3
Local Shops, Abertridwr	£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	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	1.3	£1.3
Local Shops, Llanbradach	£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	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	0.3	£0.3
ZONE 1 TOTAL	£49.0	£15.7	£1.7	£1.3	£1.6	£0.6	£69.9	£21.6	£4.9	£0.4	£0.6	£1.1	£0.2	£28.8	£28.7	£7.5	£0.3	£0.5	£0.0	£0.0	37.0	£135.7
ZONE 2 - RISCA / PONTYMISTER																						
RISCA/PONTYMISTER PRINCIPAL TOWN CENTRE	£0.0	£1.3	£0.0	£1.6	£0.7	£0.0	£3.6	£0.0	£1.6	£0.0	£0.4	£0.0	£0.0	£2.0	£0.0	£4.3	£0.0	£0.5	£0.7	£0.0	5.5	£11.0
Lidl, Commercial Street, Risca	£0.0	£1.3	£0.0	£1.0	£0.7	£0.0	£2.9	£0.0	£1.6	£0.0	£0.4	£0.0	£0.0	£2.0	£0.0	£2.3	£0.0	£0.5	£0.2	£0.0	3.0	£7.9
Local Shops, Primary Town Centre	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.5	£0.0	2.5	£3.1
BEDWAS 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	£1.0	£0.7	£0.0	£0.0	£0.0	£0.0	1.7	£1.7
Co-op, Church Street	£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	£1.0	£0.5	£0.0	£0.0	£0.0	£0.0	1.4	£1.4
Local Shops, 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	£0.2	£0.0	£0.0	£0.0	£0.0	0.2	£0.2
OTHER (OUT OF CENTRE)	£0.0	£13.7	£0.0	£1.6	£0.7	£0.0	£16.0	£0.0	£4.3	£0.0	£1.2	£1.1	£0.0	£6.6	£0.0	£5.0	£0.0	£1.2	£0.5	£0.0	6.6	£29.2
Aldi, Pontymister Industrial Estate / Interchange, Risca	£0.0	£4.6	£0.0	£0.3	£0.3	£0.0	£5.2	£0.0	£2.0	£0.0	£0.4	£0.0	£0.0	£2.4	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	1.1	£8.7
Tesco Express, Riverbank Newport Road, Caerphilly	£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	£0.5	£0.0	£0.0	£0.0	£0.0	0.5	£0.5
Tesco Extra, Pontymister Industrial Estate, Pontymister	£0.0	£9.2	£0.0	£1.3	£0.3	£0.0	£10.8	£0.0	£2.4	£0.0	£0.8	£1.1	£0.0	£4.2	£0.0	£2.5	£0.0	£1.2	£0.5	£0.0	4.1	£19.1
Local Shops, Crosskeys Village 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	£0.9	£0.0	£0.0	£0.0	£0.0	0.9	£0.9
ZONE 2 TOTAL	£0.0	£15.0	£0.0	£3.2	£1.3	£0.0	£19.5	£0.0	£5.9	£0.0	£1.7	£1.1	£0.0	£8.6	£1.0	£10.0	£0.0	£1.6	£1.2	£0.0	13.7	£41.9
ZONE 4 - YSTRAD MYNACH / HENGOED																						
YSTRAD MYNACH PRINCIPAL TOWN CENTRE	£0.6	£0.0	£9.0	£8.9	£3.6	£0.9	£23.0	£0.0	£0.0	£2.6	£4.1	£1.2	£0.0	£8.0	£0.0	£0.0	£2.5	£6.3	£0.0	£0.0	8.8	£39.8
Lidl, Pengam Road, Ystrad Mynach	£0.0	£0.0	£2.4	£3.2	£1.0	£0.6	£7.2	£0.0	£0.0	£1.3	£1.2	£0.5	£0.0	£3.1	£0.0	£0.0	£0.8	£2.1	£0.0	£0.0	2.8	£13.1
Tesco Superstore, New Road, Ystrad Mynach	£0.6	£0.0	£6.5	£5.7	£2.6	£0.3	£15.8	£0.0	£0.0	£1.3	£2.9	£0.7	£0.0	£4.9	£0.0	£0.0	£1.8	£3.3	£0.0	£0.0	5.0	£25.8
Local Shops, Primary Town 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	£0.9	£0.0	£0.0	0.9	£0.9
OTHER (OUT OF CENTRE)	£0.0	£0.0	£0.0	£4.8	£5.5	£0.0	£10.3	£0.0	£0.0	£0.0	£1.7	£1.8	£0.0	£3.4	£0.0	£0.0	£0.3	£5.1	£3.0	£0.0	8.4	£22.1
Sainsbury's, Newbridge Rd, Pontllanfraith/Blackwood	£0.0	£0.0	£0.0	£4.8	£5.5	£0.0	£10.3	£0.0	£0.0	£0.0	£1.7	£1.6	£0.0	£3.2	£0.0	£0.0	£0.0	£3.3	£1.6	£0.0	4.9	£18.5
One Stop, Penllwyn / Pontllanfraith	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	0.2	£0.4
Local Shops, Pontllanfraith	£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	£1.4	£0.0	£0.0	1.4	£1.4
Local Shops, Abercarn	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, Hengoed	£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	£0.3	£0.5	£0.5	£0.0	1.2	£1.2
Local Shops, Cwmcarn	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, Cwmfelinfach	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, Maesycwmmer	£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	£0.0	£0.7	£0.0	0.7	£0.7
ZONE 4 - TOTAL	£0.6	£0.0	£9.0	£13.7	£9.1	£0.9	£33.3	£0.0	£0.0	£2.6	£5.8	£3.0	£0.0	£11.4	£0.0	£0.0	£2.8	£11.4	£3.0	£0.0	17.2	£61.9
ZONE 5 - BARGOED / BLACKWOOD																						
BARGOED PRINCIPAL TOWN CENTRE	£0.0	£0.0	£0.7	£1.0	£7.5	£3.3	£12.5	£0.0	£0.0	£0.6	£0.6	£4.2	£1.7	£7.2	£0.0	£0.0	£0.5	£0.9	£4.4	£2.4	8.2	£27.9
Iceland, Hanbury Road, Bargoed	£0.0	£0.0	£0.0	£1.0	£1.0	£0.9	£2.8	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.9	£0.0	£0.0	£0.0	£0.5	£1.2	£0.0	1.6	£5.3
Morrisons, Bargoed Gateway, Bargoed	£0.0	£0.0	£0.7	£0.0	£6.5	£2.4	£9.6	£0.0	£0.0	£0.6	£0.6	£3.4	£1.7	£6.3	£0.0	£0.0	£0.5	£0.0	£3.2	£2.1	6.3	£22.2
Local Shops, Primary Town 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	£0.0	£0.0	£0.3	0.3	£0.3
BLACKWOOD PRINCIPAL TOWN CENTRE	£0.0	£0.0	£0.7	£5.1	£15.7	£1.8		£0.0	£0.0	£1.7	£2.5	£7.6	£0.0	£11.8	£1.0	£0.0	£0.0	£1.2	£6.7	£0.0	8.8	£20.7
Asda, Blackwood Retail Park, Cliff Road, Blackwood	£0.0	£0.0	£0.7	£4.1	£15.3	£1.8	£22.0	£0.0	£0.0	£1.7	£1.7	£6.0	£0.0	£9.4	£1.0	£0.0	£0.0	£0.9	£2.3	£0.0	4.2	£35.6
Iceland, Islwyn Centre, Blackwood	£0.0	£0.0	£0.0	£1.0	£0.3	£0.0	£1.3	£0.0	£0.0	£0.0	£0.2	£1.2	£0.0	£1.4	£0.0	£0.0	£0.0	£0.2	£2.8	£0.0	3.0	£5.7
B&M Bargains, Cliff Road, Blackwood	£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	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	0.2	£0.6
Farmfoods, Blackwood Retail Park, Blackwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	0.5	£1.1
Local Shops, Primary Town 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	£0.0	£0.9	£0.0	0.9	£0.9
NEWBRIDGE 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	£0.0	£1.2	£0.0	1.2	£1.2
Local Shops, 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	£0.0	£1.2	£0.0	1.2	£1.2
BLACKWOOD GATE RETAIL WAREHOUSE PARK	£0.0	£0.0	£1.0	£3.8	£8.2	£0.3	£13.3	£0.0	£0.0	£0.6	£0.8	£2.7	£0.4	£4.5	£0.0	£0.0	£0.8	£0.9	£1.6	£0.0	3.3	£21.2
Aldi, Blackwood Gate Retail Park, Blackwood	£0.0	£0.0	£1.0	£3.8	£8.2	£0.3	£13.3	£0.0	£0.0	£0.6	£0.8	£2.3	£0.4	£4.2	£0.0	£0.0	£0.8	£0.2	£1.6	£0.0	2.6	£20.1
Home Bargains, Blackwood Gate Retail Park	£0.0	£0.0	£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	£0.0	£0.0	£0.7	£0.0	£0.0	0.7	£1.1
OTHER (OUT OF CENTRE)	£0.0	£0.0	£0.3	£0.0	£0.7	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.6	£10.0	£0.5	12.4	£13.4
Tesco Express, Highfield Way, Blackwood	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£3.9	£0.0	4.9	£5.5
Co-op, Central Buildings, Oakdale	£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	£0.5	£1.2	£0.0	1.6	£1.6
One Stop, Markham	£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	£0.2	£0.7	£0.0	0.9	£0.9
Local Shops, Pengam	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.3	£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	£0.3
Local Shops, Aberbargoed	£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	£0.3	£0.0	£0.5	£0.5	1.2	£1.2
Local Shops, Cefn Fforest	£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	£0.0	£0.7	£0.0	0.7	£0.7
Local Shops, Croespenmaen	£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	£0.0	£0.2	£0.0	0.2	£0.2
Local Shops, Crumlin	£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	£0.0	£0.9	£0.0	0.9	£0.9
Local Shops, Gilfach	£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	£0.0	£0.7	£0.0	0.7	£0.7
Local Shops, Markham	£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	£0.0	£0.7	£0.0	0.7	£0.7
Local Shops, Pentwyn-mawr	£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	£0.0	£0.2	£0.0	0.2	£0.2
Local Shops, Treowen	£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	£0.0	£0.2	£0.0	0.2	£0.2
ZONE 5 TOTAL	£0.0	£0.0	£2.8	£9.9	£32.0	£5.4	£50.1	£0.0	£0.0	£3.0	£3.9	£14.5	£2.1	£23.5	£1.0	£0.0	£1.5	£4.6	£23.9	£2.9	33.9	£107.5
ZONE 6 - RHYMNEY																						
RHYMNEY 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	£0.0	£0.0	£1.3	1.3	£1.3
Premier, Rhymney	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, 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	£0.0	£0.0	£1.3	1.3	£1.3
TREDEGAR DISTRICT TOWN CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	1.9	£3.6
Farmfoods, Gwent Shopping Centre, Tredegar	£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	£0.0	£0.0	£0.3	0.3	£0.3
Lidl, Gelli Road, Tredegar	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	1.3	£3.1
Home Bargains, Tredegar	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, District Town 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	£0.0	£0.0	£0.3	0.3	£0.3
OTHER (OUT OF 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	£0.0	£0.0	£1.3	1.3	£1.3
Premier, Christie's Fayre, Pontlottyn	£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	£0.0	£0.0	£0.0	0.0	£0.0
Local Shops, Pontlottyn	£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	£0.0	£0.0	£0.3	0.3	£0.3
Local Shops, New Tredegar	£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	£0.0	£0.0	£1.1	1.1	£1.1
ZONE 6 TOTAL	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	4.5	£6.2
BEYOND STUDY AREA	£4.2	£2.6	£4.5	£1.6	£3.6	£13.6	£30.0	£1.4	£3.5	£2.4	£1.2	£1.4	£5.6	£15.6	£2.3	£3.0	£1.5	£1.4	£1.6	£5.6	15.3	£60.9

Note.
Turnover calculated by applying market shares (Table 4) to available expenditure (Table 3)

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2027

STORE/CENTRE	FIRST CHOICE MAIN FOOD SHOPPING 1	2	3	4	5	6	ZONES 1 6 TOTAL	SECOND CHOICE MAIN FOOD SHOPPING 1	2	3	4	5	6	ZONES 1 6 TOTAL	TOP UP FOOD SHOPPING 1	2	3	4	5	6	ZONES 1 6 TOTAL	TOTAL
(£m)	109.7	67.8	47.0	64.9	101.5	44.0	434.8	109.7	67.8	47.0	64.9	101.5	44.0	434.8	£109.7	£67.8	£47.0	£64.9	£101.5	£44.0	£434.8	
(£m)	53.8	33.2	23.0	31.8	49.7	21.5	213.1	23.0	14.2	9.9	13.6	21.3	9.2	91.3	£32.9	£20.3	£14.1	£19.5	£30.4	£13.2	£130.4	
ZONE 3 - NELSON																						
NELSON LOCAL CENTRE	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£3.8	£0.0	£0.5	£0.3	£4.5	£6.7
Co-op, Commercial Street, Nelson	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0	£2.5	£3.4
Co-op, Mafon Road, Nelson	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£1.3	£0.0	£0.5	£0.3	£2.0	£3.2
TREHARRIS LOCAL CENTRE	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£2.0	£2.7
Co-op, Fox Street, Treharris	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£1.3	£1.9
Local Shops, 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	£0.8	£0.0	£0.0	£0.0	£0.8	£0.8
OTHER (OUT OF CENTRE)	£0.0	£0.0	£2.8	£2.2	£2.3	£0.3	£7.6	£0.0	£0.0	£1.1	£0.4	£0.4	£0.6	£2.5	£0.0	£0.0	£2.3	£0.0	£0.5	£0.0	£2.7	£12.7
Local Shops, Bedlinog	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£1.5	£2.2
Local Shops, Gelligaer	£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	£0.3	£0.0	£0.0	£0.0	£0.3	£0.3
Aldi, New Road, Tiryberth	£0.0	£0.0	£2.1	£2.2	£2.3	£0.3	£6.9	£0.0	£0.0	£1.1	£0.4	£0.4	£0.6	£2.5	£0.0	£0.0	£0.5	£0.0	£0.5	£0.0	£1.0	£10.3
ZONE 3 TOTAL	£0.0	£0.0	£5.2	£2.2	£2.3	£0.3	£10.0	£0.0	£0.0	£1.5	£0.4	£0.4	£0.6	£2.9	£0.0	£0.0	£8.1	£0.0	£0.9	£0.3	£9.2	£22.1
ZONE 1 - CAERPHILLY																						
CAERPHILLY PRINCIPAL TOWN CENTRE	£9.7	£4.6	£0.0	£0.3	£0.3	£0.0	£14.9	£6.8	£2.5	£0.0	£0.0	£0.0	£0.0	£9.3	£8.1	£2.9	£0.3	£0.0	£0.0	£0.0	£11.3	£35.4
Heron Frozen Foods, Castle Court Shopping Centre, Caerphilly	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£1.4
Iceland, Cardiff Road, Caerphilly	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.4	£0.6	£0.0	£0.0	£0.0	£0.0	£2.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£3.3
Morrisons, Castle Court, Caerphilly	£8.0	£3.9	£0.0	£0.3	£0.0	£0.0	£12.3	£5.3	£1.9	£0.0	£0.0	£0.0	£0.0	£7.3	£5.8	£2.0	£0.3	£0.0	£0.0	£0.0	£8.1	£27.7
Local Shops, Primary Town Centre	£0.0	£0.7	£0.0	£0.0	£0.3	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.5	£0.0	£0.0	£0.0	£0.0	£2.1	£3.0
GALLAGHER RETAIL WAREHOUSE PARK	£7.7	£5.5	£1.0	£0.0	£0.3	£0.0	£14.6	£4.5	£1.2	£0.0	£0.0	£0.0	£0.0	£5.7	£4.8	£1.8	£0.0	£0.0	£0.0	£0.0	£6.6	£27.0
Aldi, Gallagher Retail Park, Caerphilly	£4.2	£2.3	£0.3	£0.0	£0.3	£0.0	£7.1	£3.1	£0.4	£0.0	£0.0	£0.0	£0.0	£3.5	£3.2	£0.7	£0.0	£0.0	£0.0	£0.0	£3.9	£14.5
Tesco Superstore, Gallagher Retail Park, Caerphilly	£3.5	£3.3	£0.7	£0.0	£0.0	£0.0	£7.5	£1.4	£0.8	£0.0	£0.0	£0.0	£0.0	£2.2	£1.6	£1.1	£0.0	£0.0	£0.0	£0.0	£2.7	£12.4
OTHER (OUT OF CENTRE)	£31.5	£5.5	£0.7	£1.0	£1.0	£0.6	£40.3	£10.3	£1.2	£0.4	£0.6	£1.1	£0.2	£13.8	£15.8	£2.7	£0.0	£0.5	£0.0	£0.0	£19.0	£73.0
Aldi, Midway Retail Park, Upper Boat, Pontypridd	£1.0	£0.0	£0.3	£0.6	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.6	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.5	£3.0
Asda, Pontygwindy Road, Caerphilly	£19.0	£4.2	£0.0	£0.3	£0.3	£0.3	£24.2	£5.8	£0.8	£0.2	£0.6	£0.7	£0.0	£8.1	£3.5	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£35.8
B&M Bargains, Bedwas Road, Caerphilly	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£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	£0.0	£0.0	£0.7
Lidl, Beddau Way, off Nantgarw Road, Caerphilly	£8.4	£0.7	£0.0	£0.0	£0.0	£0.3	£9.3	£2.7	£0.4	£0.0	£0.0	£0.0	£0.0	£3.1	£4.2	£0.9	£0.0	£0.0	£0.0	£0.0	£5.1	£17.5
Tesco Express, Brynhyfryd Road, Caerphilly	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£4.3
Tesco Express, Castle View, Caerphilly	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£4.2	£0.5	£0.0	£0.0	£0.0	£0.0	£4.6	£6.1
Co-op, Commercial Road, Machen, Caerphilly	£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	£0.9	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9
Home Bargains, Pontygwindy Road, Caerphilly	£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	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5
Tesco Extra, Gelli Hirion Industrial Estate, Pontypridd	£0.3	£0.0	£0.3	£0.0	£0.7	£0.0	£1.3	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£2.5
Home Bargains, Midway Retail Park, Pontypridd	£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	£0.0	£0.0	£0.0	£0.0	£0.0
The Food Warehouse, Midway Retail Park, Pontypridd	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Taff's Well	£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	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
Local Shops, Abertridwr	£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	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3
Local Shops, Llanbradach	£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	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
ZONE 1 TOTAL	£48.9	£15.6	£1.7	£1.3	£1.6	£0.6	£69.8	£21.6	£4.9	£0.4	£0.6	£1.1	£0.2	£28.8	£28.7	£7.5	£0.3	£0.5	£0.0	£0.0	£36.9	£135.4
ZONE 2 - RISCA / PONTYMISTER																						
RISCA/PONTYMISTER PRINCIPAL TOWN CENTRE	£0.0	£1.3	£0.0	£1.6	£0.7	£0.0	£3.5	£0.0	£1.6	£0.0	£0.4	£0.0	£0.0	£2.0	£0.0	£4.3	£0.0	£0.5	£0.7	£0.0	£5.4	£11.0
Lidl, Commercial Street, Risca	£0.0	£1.3	£0.0	£1.0	£0.7	£0.0	£2.9	£0.0	£1.6	£0.0	£0.4	£0.0	£0.0	£2.0	£0.0	£2.3	£0.0	£0.5	£0.2	£0.0	£3.0	£7.8
Local Shops, Primary Town Centre	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.5	£0.0	£2.5	£3.1
BEDWAS 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	£1.0	£0.7	£0.0	£0.0	£0.0	£0.0	£1.6	£1.6
Co-op, Church Street	£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	£1.0	£0.5	£0.0	£0.0	£0.0	£0.0	£1.4	£1.4
Local Shops, 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	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
OTHER (OUT OF CENTRE)	£0.0	£13.7	£0.0	£1.6	£0.7	£0.0	£15.9	£0.0	£4.3	£0.0	£1.2	£1.1	£0.0	£6.6	£0.0	£5.0	£0.0	£1.2	£0.5	£0.0	£6.6	£29.1
Aldi, Pontymister Industrial Estate / Interchange, Risca	£0.0	£4.6	£0.0	£0.3	£0.3	£0.0	£5.2	£0.0	£1.9	£0.0	£0.4	£0.0	£0.0	£2.4	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£1.1	£8.7
Tesco Express, Riverbank Newport Road, Caerphilly	£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	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5
Tesco Extra, Pontymister Industrial Estate, Pontymister	£0.0	£9.1	£0.0	£1.3	£0.3	£0.0	£10.7	£0.0	£2.3	£0.0	£0.8	£1.1	£0.0	£4.2	£0.0	£2.5	£0.0	£1.2	£0.5	£0.0	£4.1	£19.0
Local Shops, Crosskeys Village 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	£0.9	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9
ZONE 2 TOTAL	£0.0	£15.0	£0.0	£3.2	£1.3	£0.0	£19.5	£0.0	£5.8	£0.0	£1.7	£1.1	£0.0	£8.6	£1.0	£9.9	£0.0	£1.6	£1.2	£0.0	£13.7	£41.7
ZONE 4 - YSTRAD MYNACH / HENGOED																						
YSTRAD MYNACH PRINCIPAL TOWN CENTRE	£0.6	£0.0	£8.9	£8.9	£3.6	£0.9	£23.0	£0.0	£0.0	£2.6	£4.1	£1.2	£0.0	£7.9	£0.0	£0.0	£2.5	£6.3	£0.0	£0.0	£8.8	£39.7
Lidl, Pengam Road, Ystrad Mynach	£0.0	£0.0	£2.4	£3.2	£1.0	£0.6	£7.2	£0.0	£0.0	£1.3	£1.2	£0.5	£0.0	£3.1	£0.0	£0.0	£0.8	£2.1	£0.0	£0.0	£2.8	£13.1
Tesco Superstore, New Road, Ystrad Mynach	£0.6	£0.0	£6.5	£5.7	£2.6	£0.3	£15.8	£0.0	£0.0	£1.3	£2.9	£0.7	£0.0	£4.9	£0.0	£0.0	£1.8	£3.2	£0.0	£0.0	£5.0	£25.7
Local Shops, Primary Town 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	£0.9	£0.0	£0.0	£0.9	£0.9
OTHER (OUT OF CENTRE)	£0.0	£0.0	£0.0	£4.8	£5.5	£0.0	£10.3	£0.0	£0.0	£0.0	£1.7	£1.8	£0.0	£3.4	£0.0	£0.0	£0.3	£5.1	£3.0	£0.0	£8.3	£22.1
Sainsbury's, Newbridge Rd, Pontllanfraith/Blackwood	£0.0	£0.0	£0.0	£4.8	£5.5	£0.0	£10.3	£0.0	£0.0	£0.0	£1.7	£1.6	£0.0	£3.2	£0.0	£0.0	£0.0	£3.2	£1.6	£0.0	£4.9	£18.4
One Stop, Penllwyn / Pontllanfraith	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.4
Local Shops, Pontllanfraith	£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	£1.4	£0.0	£0.0	£1.4	£1.4
Local Shops, Abercarn	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Hengoed	£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	£0.3	£0.5	£0.5	£0.0	£1.2	£1.2
Local Shops, Cwmcarn	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Cwmfelinfach	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Maesycwmmer	£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	£0.0	£0.7	£0.0	£0.7	£0.7
ZONE 4 - TOTAL	£0.6	£0.0	£8.9	£13.7	£9.1	£0.9	£33.3	£0.0	£0.0	£2.6	£5.8	£3.0	£0.0	£11.3	£0.0	£0.0	£2.8	£11.4	£3.0	£0.0	£17.1	£61.7
ZONE 5 - BARGOED / BLACKWOOD																						
BARGOED PRINCIPAL TOWN CENTRE	£0.0	£0.0	£0.7	£1.0	£7.5	£3.3	£12.4	£0.0	£0.0	£0.6	£0.6	£4.2	£1.6	£7.1	£0.0	£0.0	£0.5	£0.9	£4.4	£2.4	£8.2	£27.7
Iceland, Hanbury Road, Bargoed	£0.0	£0.0	£0.0	£1.0	£1.0	£0.9	£2.8	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.9	£0.0	£0.0	£0.0	£0.5	£1.2	£0.0	£1.6	£5.3
Morrisons, Bargoed Gateway, Bargoed	£0.0	£0.0	£0.7	£0.0	£6.5	£2.4	£9.6	£0.0	£0.0	£0.6	£0.6	£3.3	£1.6	£6.3	£0.0	£0.0	£0.5	£0.5	£3.2	£2.1	£6.3	£22.1
Local Shops, Primary Town 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	£0.0	£0.0	£0.3	£0.3	£0.3
BLACKWOOD PRINCIPAL TOWN CENTRE	£0.0	£0.0	£0.7	£5.1	£15.6	£1.8	£23.2	£0.0	£0.0	£1.7	£2.5	£7.6	£0.0	£11.8	£1.0	£0.0	£0.0	£1.2	£6.7	£0.0	£8.8	£43.8
Asda, Blackwood Retail Park, Cliff Road, Blackwood	£0.0	£0.0	£0.7	£4.1	£15.3	£1.8	£21.9	£0.0	£0.0	£1.7	£1.7	£6.0	£0.0	£9.4	£1.0	£0.0	£0.0	£0.9	£2.3	£0.0	£4.2	£35.4
Iceland, Islwyn Centre, Blackwood	£0.0	£0.0	£0.0	£1.0	£0.3	£0.0	£1.3	£0.0	£0.0	£0.0	£0.2	£1.2	£0.0	£1.4	£0.0	£0.0	£0.0	£0.2	£2.8	£0.0	£3.0	£5.7
B&M Bargains, Cliff Road, Blackwood	£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	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.6
Farmfoods, Blackwood Retail Park, Blackwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.5	£1.1
Local Shops, Primary Town 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	£0.0	£0.9	£0.0	£0.9	£0.9
NEWBRIDGE 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	£0.0	£1.2	£0.0	£1.2	£1.2
Local Shops, 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	£0.0	£1.2	£0.0	£1.2	£1.2
BLACKWOOD GATE RETAIL WAREHOUSE PARK	£0.0	£0.0	£1.0	£3.8	£8.1	£0.3	£13.3	£0.0	£0.0	£0.6	£0.8	£2.6	£0.4	£4.5	£0.0	£0.0	£0.8	£0.9	£1.6	£0.0	£3.3	£21.1
Aldi, Blackwood Gate Retail Park, Blackwood	£0.0	£0.0	£1.0	£3.8	£8.1	£0.3	£13.3	£0.0	£0.0	£0.6	£0.8	£2.3	£0.4	£4.2	£0.0	£0.0	£0.8	£0.2	£1.6	£0.0	£2.6	£20.0
Home Bargains, Blackwood Gate Retail Park	£0.0	£0.0	£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	£0.0	£0.0	£0.7	£0.0	£0.0	£0.7	£1.0
OTHER (OUT OF CENTRE)	£0.0	£0.0	£0.3	£0.0	£0.7	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.6	£9.9	£0.5	£12.3	£13.3
Tesco Express, Highfield Way, Blackwood	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£3.9	£0.0	£4.8	£5.5
Co-op, Central Buildings, Oakdale	£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	£0.5	£1.2	£0.0	£1.6	£1.6
One Stop, Markham	£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	£0.2	£0.7	£0.0	£0.9	£0.9
Local Shops, Pengam	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.3	£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	£0.3
Local Shops, Aberbargoed	£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	£0.3	£0.0	£0.5	£0.5	£1.2	£1.2
Local Shops, Cefn Fforest	£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	£0.0	£0.7	£0.0	£0.7	£0.7
Local Shops, Croespenmaen	£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	£0.0	£0.2	£0.0	£0.2	£0.2
Local Shops, Crumlin	£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	£0.0	£0.9	£0.0	£0.9	£0.9
Local Shops, Gilfach	£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	£0.0	£0.7	£0.0	£0.7	£0.7
Local Shops, Markham	£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	£0.0	£0.7	£0.0	£0.7	£0.7
Local Shops, Pentwyn-mawr	£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	£0.0	£0.2	£0.0	£0.2	£0.2
Local Shops, Treowen	£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	£0.0	£0.2	£0.0	£0.2	£0.2
ZONE 5 TOTAL	£0.0	£0.0	£2.8	£9.9	£31.9	£5.4	£49.8	£0.0	£0.0	£3.0	£3.9	£14.4	£2.1	£23.4	£1.0	£0.0	£1.5	£4.6	£23.8	£2.9	£33.8	£107.0
ZONE 6 - RHYMNEY																						
RHYMNEY 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	£0.0	£0.0	£1.3	£1.3	£1.3
Premier, Rhymney	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, 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	£0.0	£0.0	£1.3	£1.3	£1.3
TREDEGAR DISTRICT TOWN CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.8	£3.6
Farmfoods, Gwent Shopping Centre, Tredegar	£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	£0.0	£0.0	£0.3	£0.3	£0.3
Lidl, Gelli Road, Tredegar	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3	£3.0
Home Bargains, Tredegar	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, District Town 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	£0.0	£0.0	£0.3	£0.3	£0.3
OTHER (OUT OF 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	£0.0	£0.0	£1.3	£1.3	£1.3
Premier, Christie's Fayre, Pontlottyn	£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	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Pontlottyn	£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	£0.0	£0.0	£0.3	£0.3	£0.3
Local Shops, New Tredegar	£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	£0.0	£0.0	£1.1	£1.1	£1.1
ZONE 6 TOTAL	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	£4.5	£6.2
BEYOND STUDY AREA	£4.2	£2.6	£4.5	£1.6	£3.6	£13.5	£29.9	£1.4	£3.5	£2.4	£1.2	£1.4	£5.5	£15.5	£2.3	£2.9	£1.5	£1.4	£1.6	£5.5	£15.3	£60.6

Note.
Turnover calculated by applying market shares (Table 4) to available expenditure (Table 3)

TABLE 6: PRE-DEVELOPMENT EXPENDITURE FLOWS

Zone 3 - Nelson	Pre- Development	
	(£m)	(%) of Total
Convenience Expenditure Retention (£m)		
Expenditure retained in Zone 3	£14.72	31%
Convenience Expenditure Flows (£m)		
To Zone 1 - Caerphilly	£2.40	5%
To Zone 2 - Risca / Pontymister	£0.00	0%
To Zone 4 - Ystrad Mynach / Hengoed	£14.29	30%
To Zone 5 - Bargoed / Blackwood	£7.27	15%
To Zone 6 - Rhymney	£0.00	0%
Beyond Study Area	£8.34	18%
Total	£32.30	69%

a. Figures taken from Table 5 - CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2027

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

TABLE 7: ANTICIPATED CONVENIENCE TRADE DRAW TO DEVELOPMENT

ZONE	TRADE DRAW (%)	2027 (£M)
1	0%	0.0
2	0%	0.0
3	95%	11.4
4	0%	0.0
5	0%	0.0
6	0%	0.0
Outside study area	5%	0.6
TOTAL	100.00%	£12.00

Note: Trade draw informed by shopping patterns for primary catchment.

FORMER CO-OP STORE, MAFON ROAD, NELSON
RETAIL IMPACT ASSESSMENT

TABLE 8: CONVENIENCE GOODS TRADING DRAW ALLOCATION & TRADING IMPACT 2027 (£m) OF ALDI PROPOSALS (£m)

DESTINATION	Convenience Turnover from Zone 3	Convenience Turnover from wider study area 2027	Total Convenience Turnover (from HH survey) 2027	Trade draw from Zone 3		Trade draw from beyond Study Area		% Trading Impact	Post Aldi Impact Total Turnover 2027 (£m)
	Total (£m)	Total (£m)	Total (£m)	£m Diversion	% Diversion	£m Diversion	% Diversion		
ZONE 3 - NELSON									
NELSON LOCAL CENTRE	**£5.93**	**£0.73**	**£6.65**	**£2.62**	**23.00%**	**£0.00**	**0.00%**	**39.41%**	**£4.03**
Co-op, Commercial Street, Nelson	£3.42	£0.00	£3.42	£0.11	0.98%	£0.00	0.00%	3.26%	£3.31
Co-op, Mafon Road, Nelson	£2.51	£0.73	£3.23	£2.51	22.02%	£0.00	0.00%	77.68%	£0.00
Local Shops, Local Centre	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	0.00%	£0.00
TREHARRIS LOCAL CENTRE	**£2.70**	**£0.00**	**£2.70**	**£0.11**	**1.00%**	**£0.00**	**0.00%**	**4.22%**	**£2.59**
Co-op, Fox Street, Treharris	£1.95	£0.00	£1.95	£0.11	1.00%	£0.00	0.00%	5.85%	£1.83
Local Shops, Local Centre:	£0.76	£0.00	£0.76	£0.00	0.00%	£0.00	0.00%	0.00%	£0.76
OTHER (OUT OF CENTRE)									
Local Shops, Bedlinog	£2.20	£0.00	£2.20	£0.00	0.00%	£0.00	0.00%	0.00%	£2.20
Local Shops, Gelligaer	£0.25	£0.00	£0.25	£0.00	0.00%	£0.00	0.00%	0.00%	£0.25
Aldi, New Road, Tiryberth	£3.64	£6.64	£10.28	£2.05	18.00%	£0.00	0.00%	19.96%	£8.23
SUB-TOTAL Zone 3	£14.72	£7.37	£22.09	£4.79	42.0%	£0.00	0.0%	-	£17.30
ZONE 1 - CAERPHILLY									
CAERPHILLY PRINCIPAL: TOWN CENTRE	**£0.25**	**£35.18**	**£35.43**	**£0.11**	**1.00%**	**£0.00**	**0.00%**	**0.32%**	**£35.32**
Heron Frozen Foods, Castle Court Shopping Centre, Caerphilly	0.00	£1.42	£1.42	£0.00	0.0%	£0.00	0.0%	0.00%	£1.42
Iceland, Cardiff Road, Caerphilly	0.00	£3.31	£3.31	£0.00	0.00%	£0.00	0.0%	0.00%	£3.31
Morrisons, Castle Court, Caerphilly	0.25	£27.41	£27.66	£0.11	1.00%	£0.00	0.0%	0.41%	£27.55
Local Shops, Primary Town Centre	0.00	£3.04	£3.04	£0.00	0.00%	£0.00	0.0%	0.00%	£3.04
GALLAGHER RETAIL WAREHOUSE PARK	£1.03	£25.93	£26.96	£0.57	5.00%	£0.00	0.00%	2.11%	£26.39
Aldi, Gallagher Retail Park, Caerphilly	£0.34	£14.17	£14.51	£0.23	2.00%	£0.00	0.0%	1.57%	£14.28
Tesco Superstore, Gallagher Retail Park, Caerphilly	£0.69	£11.76	£12.45	£0.34	3.00%	£0.00	0.0%	2.75%	£12.11
OTHER (OUT OF CENTRE)									
Aldi, Midway Retail Park, Upper Boat, Pontypridd	£0.34	£2.62	£2.97	£0.23	2.00%	£0.00	0.0%	7.69%	£2.74
Asda, Pontygwindy Road, Caerphilly	£0.21	£35.58	£35.79	£0.11	1.00%	£0.00	0.0%	0.32%	£35.68
B&M Bargains, Bedwas Road, Caerphilly	£0.00	£0.65	£0.65	£0.00	0.00%	£0.00	0.0%	0.00%	£0.65
Lidl, Beddau Way, off Nantgarw Road, Caerphilly	£0.00	£17.48	£17.48	£0.00	0.00%	£0.00	0.0%	0.00%	£17.48
Tesco Express, Brynhyfryd Road, Caerphilly	£0.00	£4.25	£4.25	£0.00	0.00%	£0.00	0.0%	0.00%	£4.25
Tesco Express, Castle View, Caerphilly	£0.21	£5.93	£6.15	£0.00	0.00%	£0.00	0.0%	0.00%	£6.15
Co-op, Commercial Road, Machen, Caerphilly	£0.00	£0.90	£0.90	£0.00	0.00%	£0.00	0.0%	0.00%	£0.90
Home Bargains, Pontygwindy Road, Caerphilly	£0.00	£0.45	£0.45	£0.00	0.00%	£0.00	0.0%	0.00%	£0.45
Tesco Extra, Gelli Hirion Industrial Estate, Pontypridd	£0.34	£2.12	£2.46	£0.11	1.00%	£0.00	0.0%	4.63%	£2.35
Home Bargains, Midway Retail Park, Pontypridd	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.0%	0.00%	£0.00
The Food Warehouse, Midway Retail Park, Pontypridd	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.0%	0.00%	£0.00
Local Shops, Taff's Well	£0.00	£0.32	£0.32	£0.00	0.00%	£0.00	0.0%	0.00%	£0.32
Local Shops, Abertridwr	£0.00	£1.29	£1.29	£0.00	0.00%	£0.00	0.0%	0.00%	£1.29
Local Shops, Llanbradach	£0.00	£0.32	£0.32	£0.00	0.00%	£0.00	0.0%	0.00%	£0.32
SUB-TOTAL Zone 1	£2.40	£133.03	£135.43	£1.14	10%			-	£134.30
ZONE 2 - RISCA / PONTYMISTER									
RISCA/PONTYMISTER PRINCIPAL TOWN CENTRE	£0.00	£10.96	£10.96	£0.00	0.00%	£0.00	0.00%	0.00%	£10.96
Lidl, Commercial Street, Risca	£0.00	£7.83	£7.83	£0.00	0.00%	£0.00	0.0%	0.00%	£7.83
Local Shops, Primary Town Centre	£0.00	£3.13	£3.13	£0.00	0.00%	£0.00	0.0%	0.00%	£3.13
BEDWAS LOCAL CENTRE	£0.00	£1.65	£1.65	£0.00	0.00%	£0.00	0.00%	0.00%	£1.65
Co-op, Church Street	£0.00	£1.42	£1.42	£0.00	0.00%	£0.00	0.0%	0.00%	£1.42
Local Shops, Local Centre	£0.00	£0.23	£0.23	£0.00	0.00%	£0.00	0.0%	0.00%	£0.23
OTHER (OUT OF CENTRE)									
Aldi, Pontymister Industrial Estate / Interchange, Risca	£0.00	£8.69	£8.69	£0.00	0.00%	£0.00	0.0%	0.00%	£8.69
Tesco Express, Riverbank Newport Road, Caerphilly	£0.00	£0.45	£0.45	£0.00	0.00%	£0.00	0.0%	0.00%	£0.45
Tesco Extra, Pontymister Industrial Estate, Pontymister	£0.00	£19.04	£19.04	£0.00	0.00%	£0.00	0.0%	0.00%	£19.04
Local Shops, Crosskeys Village Centre	£0.00	£0.90	£0.90	£0.00	0.00%	£0.00	0.0%	0.00%	£0.90
SUB-TOTAL Zone 2	£0.00	£41.70	£41.70	£0.00	0%	£0.00	0%	-	£41.70
ZONE 4 - YSTRAD MYNACH / HENGOED									
YSTRAD MYNACH PRINCIPAL TOWN CENTRE	£14.04	25.63	£39.67	£2.74	24.00%	£0.00	0.00%	6.90%	£36.93
Lidl, Pengam Road, Ystrad Mynach	£4.45	£8.60	£13.06	£1.60	14.00%	£0.00	0.0%	12.22%	£11.46
Tesco Superstore, New Road, Ystrad Mynach	£9.59	£16.10	£25.69	£1.14	10.00%	£0.00	0.0%	4.44%	£24.55
Local Shops, Primary Town Centre	£0.00	£0.93	£0.93	£0.00	0.00%	£0.00	0.0%	0.00%	£0.93
OTHER (OUT OF CENTRE)									
Sainsbury's, Newbridge Rd, Pontllanfraith/Blackwood	0.00	£18.39	£18.39	£0.00	0.00%	£0.00	0.0%	0.00%	£18.39
One Stop, Penllwyn / Pontllanfraith	£0.00	£0.41	£0.41	£0.00	0.00%	£0.00	0.0%	0.00%	£0.41
Local Shops, Pontllanfraith	£0.00	£1.39	£1.39	£0.00	0.00%	£0.00	0.0%	0.00%	£1.39
Local Shops, Abercarn	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.0%	0.00%	£0.00
Local Shops, Hengoed	£0.25	£0.92	£1.18	£0.00	0.00%	£0.00	0.0%	0.00%	£1.18
Local Shops, Cwmcarn	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.0%	0.00%	£0.00
Local Shops, Cwmfelinfach	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.0%	0.00%	£0.00
Local Shops, Maesycwmmer	£0.00	£0.69	£0.69	£0.00	0.00%	£0.00	0.0%	0.00%	£0.69
SUB-TOTAL Zone 4	£14.29	£47.44	£61.72	£2.74	24%	£0.00	0%	-	£58.99
ZONE 5 - BARGOED / BLACKWOOD									
BARGOED PRINCIPAL TOWN CENTRE	£1.84	£25.89	£27.73	£0.23	2.00%	£0.00	0.00%	0.82%	£27.50
Iceland, Hanbury Road, Bargoed	£0.00	£5.32	£5.32	£0.00	0.00%	£0.00	0.00%	0.00%	£5.32
Morrisons, Bargoed Gateway, Bargoed	£1.84	£20.30	£22.14	£0.23	2.00%	£0.00	0.00%	1.03%	£21.91
Local Shops, Primary Town Centre	£0.00	£0.26	£0.26	£0.00	0.00%	£0.00	0.00%	0.00%	£0.26
BLACKWOOD PRINCIPAL TOWN CENTRE	£2.41	£41.35	£43.75	£0.34	3.00%	£0.00	0.00%	0.78%	£43.41
Asda, Blackwood Retail Park, Cliff Road, Blackwood	£2.41	£33.04	£35.45	£0.34	3.00%	£0.00	0.0%	0.96%	£35.11
Iceland, Islwyn Centre, Blackwood	£0.00	£5.72	£5.72	£0.00	0.00%	£0.00	0.0%	0.00%	£5.72
B&M Bargains, Cliff Road, Blackwood	£0.00	£0.61	£0.61	£0.00	0.00%	£0.00	0.0%	0.00%	£0.61
Farmfoods, Blackwood Retail Park, Blackwood	£0.00	£1.05	£1.05	£0.00	0.00%	£0.00	0.0%	0.00%	£1.05
Local Shops, Primary Town Centre	£0.00	£0.92	£0.92	£0.00	0.00%	£0.00	0.0%	0.00%	£0.92
NEWBRIDGE LOCAL CENTRE	£0.00	£1.15	£1.15	£0.00	0.00%	£0.00	0.00%	0.00%	£1.15
Local Shops, Local Centre	£0.00	£1.15	£1.15	£0.00	0.00%	£0.00	0.00%	0.00%	£1.15
BLACKWOOD GATE RETAIL WAREHOUSE PARK	£2.43	£18.66	£21.09	£0.68	6.00%	£0.00	0.00%	3.24%	£20.41
Aldi, Blackwood Gate Retail Park, Blackwood	£2.43	£17.61	£20.04	£0.68	6.00%	£0.00	0.0%	3.41%	£19.36
Home Bargains, Blackwood Gate Retail Park	£0.00	£1.05	£1.05	£0.00	0.00%	£0.00	0.0%	0.00%	£1.05
OTHER (OUT OF CENTRE)									
Tesco Express, Highfield Way, Blackwood	£0.00	£5.50	£5.50	£0.00	0.00%	£0.00	0.0%	0.00%	£5.50
Co-op, Central Buildings, Oakdale	£0.00	£1.62	£1.62	£0.00	0.00%	£0.00	0.0%	0.00%	£1.62
One Stop, Markham	£0.00	£0.92	£0.92	£0.00	0.00%	£0.00	0.0%	0.00%	£0.92
Local Shops, Pengam	£0.34	£0.00	£0.34	£0.00	0.00%	£0.00	0.0%	0.00%	£0.34
Local Shops, Aberbargoed	£0.25	£0.99	£1.24	£0.00	0.00%	£0.00	0.0%	0.00%	£1.24
Local Shops, Cefn Fforest	£0.00	£0.69	£0.69	£0.00	0.00%	£0.00	0.0%	0.00%	£0.69
Local Shops, Croespenmaen	£0.00	£0.23	£0.23	£0.00	0.00%	£0.00	0.0%	0.00%	£0.23
Local Shops, Crumlin	£0.00	£0.92	£0.92	£0.00	0.00%	£0.00	0.0%	0.00%	£0.92
Local Shops, Gilfach	£0.00	£0.69	£0.69	£0.00	0.00%	£0.00	0.0%	0.00%	£0.69
Local Shops, Markham	£0.00	£0.69	£0.69	£0.00	0.00%	£0.00	0.0%	0.00%	£0.69
Local Shops, Pentwyn-mawr	£0.00	£0.23	£0.23	£0.00	0.00%	£0.00	0.0%	0.00%	£0.23
Local Shops, Treowen	£0.00	£0.23	£0.23	£0.00	0.00%	£0.00	0.0%	0.00%	£0.23
SUB-TOTAL Zone 5	£7.27	£99.77	£107.04	£1.25	11.00%	£0.00	0%	-	£105.78
ZONE 6 - RHYMNEY									
RHYMNEY LOCAL CENTRE	£0.00	£1.32	£1.32	£0.00	0.00%	£0.00	0.00%	0.00%	£1.32
Premier, Rhymney	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	0.00%	£0.00
Local Shops, Local Centre	£0.00	£1.32	£1.32	£0.00	0.00%	£0.00	0.00%	0.00%	£1.32
TREDEGAR DISTRICT TOWN CENTRE	£0.00	£3.56	£3.56	£0.00	0.00%	£0.00	0.00%	0.00%	£3.56
Farmfoods, Gwent Shopping Centre, Tredegar	£0.00	£0.26	£0.26	£0.00	0.00%	£0.00	0.00%	0.00%	£0.26
Lidl, Gelli Road, Tredegar	£0.00	£3.04	£3.04	£0.00	0.00%	£0.00	0.00%	0.00%	£3.04
Home Bargains, Tredegar	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	0.00%	£0.00
Local Shops, District Town Centre	£0.00	£0.26	£0.26	£0.00	0.00%	£0.00	0.00%	0.00%	£0.26
OTHER (OUT OF CENTRE)									
Premier, Christie's Fayre, Pontlottyn	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	0.00%	£0.00
Local Shops, Pontlottyn	£0.00	£0.26	£0.26	£0.00	0.00%	£0.00	0.00%	0.00%	£0.26
Local Shops, New Tredegar	£0.00	£1.06	£1.06	£0.00	0.00%	£0.00	0.00%	0.00%	£1.06
SUB-TOTAL Zone 6	£0.00	£6.20	£6.20	£0.00	0.00%	£0.00	0.00%	-	£6.20
BEYOND STUDY AREA									
BEYOND STUDY AREA	£8.34	£52.29	£60.64	£1.48	13.00%	£0.60	100.00%	3.43%	£58.56
SUB-TOTAL Outside Study Area	£8.34	£52.29	£60.64	£1.48	13.00%	£0.60	100.00%	-	£58.56
TOTAL	£47.02	£387.80	£434.82	£11.40	100.00%	£0.60	100.00%	-	£422.83

Notes:
a. Trade allocation of the proposal based on the primary catchment area, existing shopping patterns as informed by the Tables 3, 4 and 5 and geographic location of retail provision.
b. Turnover of Aldi store from Table 1 Aldi turnover.
2020 Prices

TABLE 9: POST-DEVELOPMENT EXPENDITURE FLOWS

Zone 1	Pre- Development		Post Aldi, Nelson Development	
	Expenditure Retention (£m)	(%) of Total	Expenditure Retention (£m)	(%) of Total
Convenience and Comparison Expenditure Retention (£m)	£14.72	31%	£21.93	47%
Convenience and Comparison Expenditure Leakage (£m)	£32.30	69%	£25.09	53%

a. Figures taken from Table 5 for expenditure retention. Figures taken from Table 8 for diversions back to Zone 3.

Appendix IV

Retail Impact Assessment Methodology

Appendix 4: Retail Impact Assessment Methodology

Methodology / Data Input	Approach / Data Source
Population and Expenditure	
Price Base	2020 prices, inline with Council's Retail Capacity Study (2022).
Population and Expenditure Base Data Source	Base population and per capita expenditure derived from Experian Location Analyst data (January 2024 Report).
Population Growth Assumptions	Population projected forwards in line with Experian Location Analyst data report (report dated January 2024).
Convenience and Comparison Goods Expenditure Growth Assumptions	Experian forecast convenience and comparison goods growth rates, taken from Figure 6, Appendix 3 of Experian Retail Planner Briefing Note 20 (February 2023).
Non-Store Retail Trade / Special Forms of Trading	Year-on-year NSRT deduction taken from Figure 5, Appendix 3 of Experian Retail Planner Briefing Note 20 (February 2023).
Study Area and Shopping Patterns	
Impact Assessment Area of Study	Council Study covered 6 zones relating to the administrative boundary and immediately adjoining areas. Nelson is located in Zone 3. Primary catchment for the retail development based on an adjusted 7 min off-peak drivetime and most closely relates to Zone 3 of the Council Study. This area has therefore been the focus of the assessment.
Household Shopper Survey Base Data	Household survey findings informing the Council's Retail Capa Study (October 2022) obtained by a household survey in April 2022.
Floorspace, Sales Densities, and Turnover	
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 2022.
Changes in Retail Sales Densities	Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b of Experian Retail Planner Briefing Note 20 (February 2023).
Retail Impact Assumptions	
Impact Assessment Base Year	2024 (reflecting the fact that this will be the year in which the planning application is determined)
Impact Assessment Test Years	2027 (three years from the date of the planning application)
Inflow Expenditure Allowance (Existing Facilities and Centres)	This is taken from the assumptions within the Council's Retail Capacity Study (October 2022) Appendix 2 Table 4.
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

[redacted]

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