Planning Potential

Planning and Retail Statement

Abberley Hall Road,
Mon Bank, Newport

Contents

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Report Reference:
20/4247N

Executive Summary

This Statement has been prepared on behalf of Aldi Stores Ltd ('Aldi'), in support of a planning application for the erection of a Class A1 retail foodstore with associated access, car parking and landscaping at Abberley Hall Road in the Mon Bank area of Newport.

Aldi intends to construct a store at the site to serve the population of the western side of Newport. The closest Aldi store to the application site is currently at Barrack Hill, which is a 3km drive to the north.

The proposed Aldi will result in considerable economic benefits for the local area, with up to 40 new local jobs being created, in addition to short term construction jobs. The site is a long term vacant brownfield site, and the investment could act as a catalyst for future development elsewhere in the area. Given the current economic uncertainty and potential for major job losses in many sectors following the Covid-19 pandemic, this investment in Newport is of significant importance.

Furthermore, the proposals will enhance the discount foodstore provision in the area, and assist in retaining expenditure in the locality which will help reduce the need to travel, therefore having sustainability benefits.

Careful consideration has been given to the design of the store and the site layout, which has been informed by a thorough appraisal of the site, its context, and all existing constraints.

On the basis of the consideration of the proposals set out in this Statement (and other supporting documents), we consider that the application proposals comply with all relevant local and national policies, and planning permission should be granted.

1. Introduction

1.1. This Planning and Retail Statement is submitted by Planning Potential, on behalf of Aldi Stores Ltd (Aldi), in support of a full planning application for the erection of a Class A1 retail foodstore, and associated access, car parking, and landscaping at Abberley Hall Road in Mon Bank, Newport.

1.2. The application proposal is described as follows:

> *"Erection of a Class A1 foodstore with associated access, car parking and landscaping."*

1.3. This Statement addresses all of the relevant planning policy considerations associated with the proposed development, but should be read in conjunction with other documents and drawings submitted in support of this application.

Background

1.4. Aldi has two stores in Newport currently. The store at Barrack Hill has traded for over 15 years, but is located within a small retail unit which cannot be expanded. The store is due to close once the recently approved (Ref: 19/0111) Aldi store at Crindau opens, which will then predominantly serve the customers in the northern part of Newport.

1.5. The second store in the city is at Spytty Road. This was recently extended and refurbished (Ref. 19/0049). This store predominantly serves customers in the eastern part of the city.

1.6. The proposed store would enable the western area of Newport to be served by its own dedicated store, reducing the requirement for local residents to travel to the other two stores.

1.7. Aldi have now identified a suitable brownfield site at Abberley Hall Road which can accommodate a new store to serve the western part of Newport.

1.8. Prior to submitting this application proposal, Aldi held discussions with Council Officers at a meeting in February 2020. This will be referenced later in this statement.

Report Structure

1.9. This assessment is set out as follows:

- Section 2 – Summarises the site context
- Section 3 – Details the development proposals;
- Section 4 – Sets out the planning policy context against which the proposal should be assessed, including Planning Policy Wales and the Local Development Plan;
- Section 5 – Undertakes a sequential assessment of potential alternative sites;
- Section 6 – Undertakes a retail need (quantitative and qualitative) and retail impact assessment;

- Section 7 – Assesses the other material considerations relevant for the application; and
- Section 8 – Presents our summary and conclusions.

2. Site Context

The Site

2.1. The proposed site extends to approximately 0.815ha. The site is situated in an out-of-centre location, within the settlement boundary, and approximately 1.12km to the south west of Newport city centre.

2.2. The site is bounded to the north by Cardiff Road (B4237) and a rail line, to the south by Abberley Hall Road, to the west by Monmouth Castle Drive, and to the east by an area of undeveloped scrubland.

2.3. The application site is currently open scrubland, but is technically brownfield land, given its historic use as railway sidings.

2.4. The vehicular access into the site is from the south, from Abberley Hall Road.

2.5. There are no Listed Buildings on or surrounding the site, nor is it located within or adjacent to a Conservation Area.

Relevant Allocations and Designations

2.6. The application site is not allocated for a specific use within the adopted development plan, but it is located adjacent to residential development sites.

2.7. To the south and south east, two parcels of land are allocated for residential development as part of a housing regeneration area (Policy H1 of the Newport Local Development Plan (NLDP)). These two sites are Monmouthshire Bank Sidings (NLDP ref H1.14) and the Whitehead Works site (NLDP ref H1.51). These housing developments are being implemented.

2.8. This site is not covered by or adjacent to any specific ecological or conservation designations. The closest such designation is the River Usk SAC, located approximately 1.3km away.

2.9. The site is located within Flood Zone B, which is 'An area known to have flooded in the past'.

Relevant Planning History

2.10. The planning history relevant to the application site is included below:

- Ref 07/0540 – Outline planning permission was allowed at appeal for a residential scheme of no more than 575 dwellings and associated works via the Welsh Assembly on 25 January 2011. This permission has been implemented, with several phases of development now complete.

- Four reserved matters applications were submitted and approved in 2012 and 2013, subsequent to the 2011 outline permission.

2.11. Within Permission Ref: 07/0540, a Section 106 Agreement was signed (dated 14 December 2010) which contained clauses relating to the application site.

2.12. Clause 1 (Schedule One) states:

"The Owner and/or the Developer shall reserve an area comprising 1 2 ha of the Site for possible employment purposes the size and location of which are to be in accordance with the draft master plan attached as Appendix 3"

2.13. Clause 2 (Schedule One) states:

"The Owner and/or the Developer shall undertake at its own cost a joint marketing strategy for a period of two (2) years following the service of the Implementation Notice to seek a commercial developer to secure and promote the employment land for employment/commercial purposes"

2.14. Clause 2 (Schedule One) therefore requires the land to be marketed for employment purposes for a period of 2 years before other land uses can be considered.

Wider Area

2.15. A large out of centre Tesco Extra superstore with a PFS located 450m to the west of the application site on Harlech Retail Park. The store measures approximately 8,848 sq. m, with a net sales area of 3,080 sq. m.

2.16. Harlech Retail Park consists of 5 units over 14996 sq. m with 753 parking spaces anchored by the Tesco Extra. Other stores include:

- Homebase
- Hobbycraft
- Currys PC World
- McDonalds

2.17. A Lidl store is located approximately 925m to the south east at Docks Way. It measures approximately 770 sq. m (gross), with a net sales area of 616 sq. m. This store is due to close and be replaced with a new Lidl store located at the former South Wales Argus office site at the junction of Cardiff Road and Bideford Road (Ref: 18/0787)

Pre-Application Dialogue

2.18. On 19 September 2018, a pre-application request was made to Newport City Council to discuss developing the site to accommodate an Aldi foodstore.

2.19. A meeting was held on 17 October 2018. The main discussion points during the meeting were related to retail need and retail impact.

2.20. A further written pre-application request was submitted on 30 September 2019. This sought to provide further detail in respect of retail need and retail impact.

2.21. A meeting was then held with Beverley Owen, Tracey Brooks, and Matthew Sharp of Newport City Council on 27 February 2020.

2.22. Prior to the commencement of the PAC process, a meeting was held with Councillors Holyoake and Hayat to inform them of the proposals.

2.23. Officer's provided feedback on the initial proposals, covered the requirement for compliance with retail policy, relationship with the river frontage, loss of employment land, highways and access, flood risk, and the potential impact on the River Usk.

2.24. This application was preceded by a formal Pre-Application Consultation (PAC). Draft proposals were consulted in line with the Regulations between 22nd November 2018 and 19th December 2018. In addition to the draft application documents, an information leaflet has been sent out to approximately 3,000 addresses in the area surrounding the application site, which contained further details on the proposal, links to a website containing the draft plans, and free post response forms.

2.25. The results of the consultation will be reported in the PAC Statement, which will accompany the full planning submission.

3. The Proposed Development

3.1. This planning application proposes the erection of a new Class A1 foodstore, to be occupied by Aldi, together with associated access, parking and landscaping.

3.2. The store will measure circa 1,804 sq. m (GIA), and will have a net sales area of 1,315 sq. m. The remainder of the building comprises the 'back of house' warehousing area, staff welfare space and other ancillary space.

3.3. The site will include 112 parking spaces, which includes eight staff spaces in the service yard, four disabled spaces, and nine parent and child spaces.

3.4. The car park will include provision for 20 electric vehicle charging points (EVCPs). Initially, two 'live' charging points will be installed, with the remaining 18 spaces having 'passive' provision. Those spaces with passive provision will have the below ground infrastructure already installed so can be upgraded easily when demand requires it.

3.5. The site will be accessed from Abberley Hall Road, with separate access points for customers and service vehicles.

3.6. The service yard will be on the eastern side of the building, and will contain the loading bay where delivery vehicles are unloaded, and the external refrigeration equipment. The entire service yard will be enclosed by a 3m high acoustic fence.

3.7. Soft landscaping will be incorporated into the site with new trees and low level planting around the edge of the car park. SuDS features will also be incorporated into the site to assist with site drainage and are referred to within the Flood Consequences Assessment and Drainage Strategy documents, submitted with this application. Surface water drainage for the proposed Aldi site will be developed and approved under application separate to the planning process.

3.8. Careful consideration has been given to the scale and massing of the proposal, which has been informed by the site's context. The operational requirements of the store was also an important factor informing the final design proposals.

3.9. The layout of the proposed Aldi site is designed to produce an uncluttered and attractive environment for customers, which retains the existing open nature of the site and promotes safe vehicular and pedestrian movements.

3.10. The main materials of the Aldi building are white rendered external walls with smooth black facing brickwork (smooth black) The fenestration, canopy fascia, roof parapets and doors will be finished in the dark anthracite grey colour.

3.11. The following table summarises the features of the Aldi application proposal.

Table 1: Aldi Scheme Summary

	Aldi Proposal
Site Area (ha)	0.8
Gross Internal Area (sq m)	1,804
Retail Sales Area (sq m)	1,315

Disabled Parking Spaces	4
Parent & Child Parking Spaces	9
Total Car Parking	112
Electric vehicle spaces	20 (2 'Live')
Motorcycle Spaces	0
Covered Bicycle Sheffield Stands	4 (8 spaces)

Aldi Stores Limited

Who is Aldi?

3.12. Aldi is 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 700 stores across England, Scotland and Wales.

3.13. 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.

3.14. 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 2017 Good Housekeeping Food Awards; named Fresh Produce Supermarket of the Year at the FPC Fresh Awards 2017; and Supermarket of the Year at the 2016 Retail Industry Awards. For recognition of investment in people, Aldi was crowned Employer of the Year at The Grocer Gold Awards 2017.

How Aldi is Different

3.15. 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.

3.16. The main points 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 1,500 products;
- Own label high quality products;
- Formidable buying power;
- High volume and turnover per product;
- Heavily discounted prices providing an average 20-30% saving across the entire range, compared with similar quality products.

3.17. 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.

3.18. 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.

3.19. 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.

3.20. The deliberate intention is to restrict the range of core goods to approximately 1,500 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.

3.21. 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, stationary products and pharmaceutical products. The Aldi trading philosophy does not include a specialist butcher, fishmonger, in-store 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 photo processing, dry cleaning or opticians.

3.22. 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.

3.23. 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.

3.24. 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

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

Catchment

3.26. As Aldi stores are of modest scale and fulfil a neighbourhood shopping role, it means more than one store can be accommodated in a Local Authority area. The catchment for a new store is localised and often shoppers to a new Aldi store are existing Aldi customers who have been travelling to their nearest store, but with a new store opening close by, this can reduce the need to travel.

3.27. Aldi's local presence can assist in clawing back expenditure being spent elsewhere by providing a food store 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

3.28. 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.

3.29. 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.

3.30. 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

3.31. 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.

3.32. 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. Full details are provided in the Transport Assessment.

Residential Amenity

3.33. The opening hours of Aldi stores are more limited than some other larger supermarkets which can operate 24-hours. Currently Aldi stores operate 0800 to 2200 Monday to Saturday and for six hours between 1000 to 1800 on Sundays, to comply with Sunday Trading Laws.

3.34. 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

3.35. New Aldi stores generally employ between 30 - 50 staff. It is Aldi's preference to recruit staff locally. 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.

3.36. 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.

3.37. 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.

3.38. 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. Planning Policy Context

4.1. The following section provides a summary of the relevant national and local planning policy relevant to the proposed development of an Aldi foodstore at the application site.

Planning Policy Wales (2018)

4.2. Planning Policy Wales (PPW), Edition 10, was published in December 2018 and sets out the land use planning policies of the Welsh Government. The PPW translates the Government's commitment to sustainable development into the planning system so that it can play an appropriate role in moving toward sustainability.

4.3. The PPW is supplemented by a series of Technical Advice Notes (TANs) which will be discussed in more detail below.

Retail Guidance

4.4. National policy applying to proposals involving retail development is set out at Chapter 4 (Retail and Commercial Development) of the PPW.

4.5. Paragraph 4.3.3 states that 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; and
- Improve access to, and within, retail and commercial centres by all modes of transport, especially walking, cycling and public transport.

4.6. Paragraph 4.3.18 states that the Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. The same paragraph states that 'in implementing this policy, planning authorities should adopt a sequential approach to the selection of new sites in their development plan and when determining planning applications for retail and other complementary uses'. By adopting a sequential approach, first preference should be to locate new development within a retail and commercial centre defined in the development plan hierarchy of centres.

4.7. Paragraph 4.3.14 states that in deciding whether to identify sites for comparison, convenience or other forms of retail uses in development plans or when determining planning applications for such uses, planning authorities should first consider whether there is a need for additional retail provision.

4.8. Paragraph 4.3.26 states 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.

Technical Advice Notes (TANs) Relevant to Retail Development

4.9. TAN 4 (2016) specifically relates to retail and commercial development.

4.10. Objective 1 of TAN 4 reflects the 'town centre first' approach of the PPW and states that viable urban and rural retail and commercial centres need to be promoted as the most sustainable locations to live, work, shop, socialise and conduct business.

4.11. Part 6 sets out the Tests of Retail Needs. The retail needs tests are of a quantitative and qualitative nature, and are required to be undertaken for any application in an edge-of-centre or out-of-centre location which is not in accordance with an adopted development plan. It is also notes that this is the starting point for planning new retail development in both development plans and development management.

4.12. Paragraph 6.3 clarifies that there is no particular methodology prescribed by the Welsh Government, instead developers and LPAs are encouraged to prepare assessments in a clear logical and transparent way, with robust and realistic evidence.

4.13. Paragraph 6.5 confirms that quantitative retail need should be established, before other, qualitative aspects of need are considered. Paragraph 6.6 states that the latter is harder to justify and will be subject to close scrutiny. It notes that the overall aim of assessing qualitative need is to achieve an appropriate distribution and range of sites for stores to meet the need of all communities, particularly where provision is inadequate.

4.14. Part 7 identifies the sequential test approach which requires that 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 then outside, a settlement area be considered.

4.15. Paragraph 7.4 provides guidance on the application of the Test, noting that edge-of-centre proposals should not normally be located more than 200 to 300 metres from the edge of the centre.

4.16. The same paragraph also states that the size of the retail and commercial centre, local topography and presence of physical barriers to access may influence any assessment. For example it may limit the area that can be considered edge-of-centre for a smaller or more constrained centre.

4.17. Finally on this issue, paragraph 7.5 states that 'developers and retailers should be flexible and innovative about the format, design and scale of proposed development and the amount of car parking needed, tailoring these to fit local circumstances.'

4.18. Paragraph 8.2 outlines the requirements for retail impact assessments. Retail applications of 2,500 sq. metres or more gross floorspace that are proposed on the edge of or outside retail and commercial centres should be supported by a retail impact assessment provided by the developer. It notes that smaller retail planning applications or site allocations may also be assessed where local planning authorities believe it will have a significant impact on a retail and commercial centre.

4.19. TAN18 (Transport) states that Planning applications for development schemes for food retail over 1,000sq m GFA will need to be supported by a Transport Assessment (TA). The TA will provide the basis for assessing all the potential travel impacts of developments including their effect on the highway network and the likely modal split of the trips that would be generated. This assessment will help establish the gaps in existing transport provision and the measures necessary to make a development accessible by sustainable modes.

Newport Development Plan 2011-2026

4.20. The Newport Development Plan 2011-2026 (adopted 2015) constitutes the key Development Plan document that sets the framework for future development needs up until 2026.

4.21. The Plan identifies where development will take place, how new jobs will be supported, and how the environment of the borough will be protected and enhanced. It also allocates major sites and locations for development.

4.22. Policy SP1 – Sustainability – States that proposals will be required to make a positive contribution to sustainable development by concentrating development in sustainable locations on brownfield land within the settlement boundary.

4.23. Policy SP3 – Flood Risk - Necessitates that development be directed away from areas where flood risk is identified as a constraint and ensure that the risk of flooding is not increased elsewhere. Where appropriate a detailed technical assessment will be required to ensure that the development is designed to cope with the threat and consequences of flooding over its lifetime.

4.24. Policy SP18 – Urban Regeneration – States that proposals will be favoured which assist the regeneration of the urban area, particularly where they contribute to the reuse of vacant, underused or derelict land.

4.25. Policy SP19 – Assessment of Retail Need - Retail and associated uses best located in a city centre will be subject to an assessment of need if not within a defined centre, and application of the sequential test if not within the city centre.

4.26. Policy EM3 - Alternative Uses Of Employment Land states that development proposals promoting alternative uses on existing employment sites will be resisted unless:

- the site has been marketed unsuccessfully for employment purposes for a minimum of 12 months;
- there remains a sufficient range and choice of employment land and premises to meet LDP requirements and local demand;
- the development has no adverse impact on existing or allocated employment sites;
- the development has no adverse impact on amenity or the environment.

4.27. Policy GP4 – Highways and Accessibility - Development proposals should:

- provide appropriate access for pedestrians, cyclists and public transport in accordance with national guidance;
- be accessible by a choice of means of transport;
- be designed to avoid or reduce transport severance, noise and air pollution;

- make adequate provision for car parking and cycle storage;
- provide suitable and safe access arrangements;
- design and build new roads within private development in accordance with the highway authority's design guide and relevant national guidance;
- ensure that development would not be detrimental to highway or pedestrian safety or result in traffic generation exceeding the capacity of the highway network.

4.28. Policy GP6 – Quality of Design - Good quality design will be sought in all forms of development. The council's aim is to create a safe, accessible, attractive and convenient environment.

4.29. Policy R10 – New out of Centre Retail Sites - Proposals for large scale retail development on sites outside the city centre or district centres will not be permitted unless:

- need is identified;
- the proposed development would not, either in its own right or cumulatively with other out of centre developments, have an adverse effect on defined retail centres as a consequence of the type or range of goods sold;
- the location is acceptable in sequential terms, or the proposal involves the relocation of an existing out of centre retail facility to a sequentially acceptable site where agreements can control future retail uses on the vacated land;
- the surrounding highway and transportation network has capacity to serve the development, and that accessing and servicing arrangements can be accommodated in a satisfactory manner;
- the proposal is fully accessible on foot, by bicycle and by public transport.

Newport Parking Standards SPG

4.30. The Parking Standards SPG (adopted 2015) seeks to ensure a transparent and consistent approach to the provision of parking, submission of travel plans and sustainability considerations that will inform developers, designers and builders what is expected of them and from them at an early stage of the development process.

5. The Sequential Approach

5.1. Section 6 of the report assesses the proposed foodstore in relation to the 'sequential test', as outlined in Chapter 4 of Planning Policy Wales (clauses 4.3.18 to 4.3.24), TAN 4, and Policy R10 of the Newport LDP.

5.2. A sequential assessment has been undertaken for the proposal, as it comprises a main town centre use in an 'out-of-centre' location.

5.3. The assessment is based on analysis of available evidence, which includes the Council's LDP evidence base and work undertaken to assess other development proposals, such as the recent permitted schemes at East Retail Park (Iceland Food Warehouse), the South Wales Argus site on Cardiff Road (Lidl), and the replacement Aldi store at Albany Street, Crindau.

5.4. We conclude that the application site is the only site that is suitable, available and viable for the foodstore proposed in this case; and that it is the only site suitable for the development proposed.

Parameters

5.5. The PPW confirms that, in reviewing alternative sites, regard should be given to suitability and availability of those sites. These can be defined as follows:

- Availability – whether sites are available now or are likely to become available for development within a reasonable period of time (determined on the merits of a particular case).
- Suitability – a site or building's attributes and whether these are sufficient to meet the development requirements of a particular proposal.
- Viability – whether there is a reasonable prospect that development will occur on the site at a particular point in time. Again, the importance of demonstrating the viability of alternatives depends in part on the need that is to be addressed.

5.6. Whilst 'viability' is not expressly referenced by PPW or TAN 4 in relation to planning applications, it is our view that viability remains relevant to the consideration of whether sites are 'suitable' (for completeness we have therefore included viability within our consideration of sequentially preferable sites).

5.7. The above parameters provide a robust and policy-compliant basis for assessment.

5.8. In considering the sites, we have had regard to case law that has influenced the interpretation of the sequential test. This case law has included the principles established by the Supreme Court in their judgment with regard to a challenge by Tesco Stores Limited in Dundee, which was further clarified by the Secretary of State decision at Rushden Lakes.

5.9. More recent guidance has been provided with regard to the application of the sequential test through a High Court judgment relating to an out-of-centre food retail proposal in Mansfield (Aldergate Properties Limited and Mansfield District Council and Regal Sherwood Oaks Limited; CO/6256/2015; 8 July 2016). This judgment builds on a Secretary of State decision relating to a mixed-use retail proposal in Exeter (Land North of Honiton Road and West of Fitzroy Road; APP/Y1110/W/15/3005333) dated 30 June 2016.

5.10. Both decisions re-emphasise the 'town centres first' principle. They provide further clarity with regard to the assessment of potential sequentially preferable sites in terms of their 'suitability', 'availability' and the need for the applicant to demonstrate flexibility. In particular, the Mansfield decision confirms that when reviewing potential alternative sites:

- The terms 'suitable' and 'available' mean suitable and available for the "broad type of development which is proposed in the application by approximate size, type and range of goods." (paragraph 35).
- This is to include the requirement for flexibility and "excludes, generally, the identity and personal or corporate attitudes of an individual retailer" (paragraph 35).
- In terms of a site 'availability', this relates to a site's availability for the type of retail use for which permission is sought and not to its availability to a particular retailer (paragraph 42).

5.11. The Mansfield decision therefore confirms that the sites covered by the sequential test search should not vary from applicant to applicant depending on the identity or specific retail model proposed. It is clear, for example, that the requirements of an individual retailer, their commercial attitudes, site preferences and competitive preferences should not dictate those sites that are 'suitable' or 'available' (paragraph 38). In other words, sequential sites in town centres cannot be dismissed simply because an operator does not wish to compete with its own existing or committed stores located in or close to that centre.

5.12. In the Exeter case, the Inspector concluded (and the Secretary of State agreed) that 'availability' did not require a site to be on the open market to any developer (IR 11.39) and that the requirement to develop other parts of the site did not mean the area identified for retail was not 'available' (IR 11.40).

5.13. The sequential assessment set out below has been undertaken in the context set by both relevant policy and the clarification provided through these decisions.

The Development Proposed and Flexibility

5.14. Paragraph 7.5 of TAN4 states that 'developers and retailers should be flexible and innovative about the format, design and scale of proposed development and the amount of car parking needed, tailoring these to fit local circumstances.'

5.15. The application proposal is for a food retail store with a gross area of 1,804 sq. m, and a net sales area of 1,315sqm. This sales area would display largely prepacked convenience goods alongside a small range of comparison goods under time-limited special offers. No ancillary services or concessions are to be provided (e.g. café, tobacconist, dry cleaning, pharmacy), nor would any specialist food counters (e.g. butcher, fishmonger, deli) be provided.

5.16. A food store of this scale and type would typically require a minimum of 100 parking spaces.

5.17. The size of a site that could accommodate such a store varies with context, but it is considered that sites extending to approximately 0.7 hectares would best allow the reasonable requirements of a food retail store of this nature to be accommodated (access, parking, servicing, and landscaping).

5.18. In practical terms, such a store is at the lowest end of what would be reasonably considered a modern supermarket or main-food shopping destination. A store of this size would enable a retailer to provide and display a streamlined range of convenience goods, while also taking into account the space requirements for lobbies, walkways checkouts, back of house storage space, staff and customer facilities.

5.19. Notwithstanding this, while undertaking the sequential assessment, consideration was given to whether a store could reasonably be accommodated on a smaller site, where appropriate.

Assessment Parameters

5.20. The Primary Catchment Area (PCA) adopted for our sequential site exercise is focused on the central and western portion of the City

5.21. This has been the focus of Aldi's site search. However, in line with the town centre first approach advocated by TAN4, regard has been given to the retail hierarchy outlined in the LDP and in national guidance and summarised in section 3.

5.22. We have focussed the sequential assessment on the following areas:

- the City Centre (Zone 5);
- Malpas Road District Centre (Zone 5);
- Caerleon Road District Centre (Zone 6);
- Clarence Place Local Centre (Zone 6); and
- Handpost District Centre (Zone 1).

5.23. The following section considers these centres and their surrounds in the context of the sequential approach.

Assessment of Alternative Sites

City Centre Shopping Area

<u>Within City Centre Shopping Area</u>

5.24. The City Centre Shopping Area boundary is defined on the LDP proposals map and the Centre is given further detailed policy designations on Inset 10 of the LDP written statement.

5.25. The area is bounded by the railway infrastructure (main railway line and station complex) to the north, and the River Usk to the east. The centre has grown around, High Street, Commercial Street, Upper Dock Street, and the A4042, all of which run north-south with alongside the orientation of the River. The centre also radiates westwards along Bridge Street, and south-west along Stow Hill.

5.26. The Primary Shopping Frontages are focused on Commercial Street within the central portion of the City Centre. To the east, between Commercial Street and the River is an area that has been subject to comprehensive redevelopment, including the Friars Walk Shopping Centre, new institutional buildings and the Newport City Footbridge. This area transitions into the older Kingsway Shopping Centre to the south.

5.27. In addition, much of the northern portion of the City Centre is covered by a Conservation Area.

<u>Sites within Central Shopping Area</u>

5.28. Land within the City Centre Shopping Area has generally been developed, with car parking accommodated within multi-storey buildings and within the more modern mall developments. This limits available development plots. The LDP does not allocate any sites for redevelopment within the area.

5.29. In conclusion, the configuration of the centre is unlikely to yield any vacant units or indeed any amalgamation of vacant units to accommodate a foodstore of the nature proposed, even when applying an appropriate degree of flexibility.

5.30. One larger vacant unit is the former BHS Store on Commercial Street which measures 493 sq. m. This unit would not be suitable for the proposed development because of its very large size, its configuration over multiple floors, and lack of easily accessible grade-level car parking. Within the Aldi Crindau application, the LPA's retail consultant, Nexus Planning, agreed with this conclusion.

5.31. As a result of the above considerations, we conclude that there are no sites within the Central Shopping Area that are suitable or available for the development proposed even when allowing for flexibility.

<u>Sites at the Edge of Central Shopping Area</u>

5.32. In terms of edge of centre sites, there is a vacant plot to the south-east of the City Centre Shopping Area, located between the new University of South Wales building and the Castle Bingo site. However, this site is less than 0.35 hectares in size and would not be able to accommodate the development proposed, even applying flexibility. Opposite this site (and the other side of the A4042), there is a smaller vacant plot, adjacent to the Lidl store, which is also considered unsuitable for the proposed development.

5.33. Within the Aldi Crindau application, Nexus Planning confirmed that this site is unsuitable to accommodate the proposed development.

5.34. An additional site to consider is the former Sainsbury's site on Wyndham Street.

5.35. This site is approximately 400m from the edge of the City Centre Shopping Area as defined on Inset Plan 10 of the LDP and some 600m from the edge of the Primary Shopping Frontages. It measures approximately 2.7 hectares.

5.36. The site is allocated for housing under LDP Policy H1(32) and has been subject to an outline planning permission for student accommodation, market residential dwellings, a hotel and some small scale retail and leisure uses. We understand that the site is being marketed for the permitted uses.

5.37. For a site of this size and unusual configuration, a mixed-use proposal presents many complexities, including the requirement to design around both the site's environmental constraints and the interaction of multiple uses. This challenge is demonstrated by the passage of time between the submission of the original mixed-use proposal in July 2015, and the lack of any development progress on site to date. This 5 year period does not include the likely year-long design lead-in, prior to planning submission. Any revised scheme is therefore highly unlikely to yield a premises for a discount foodstore within a reasonable timescale.

5.38. While the 2.7 hectare site is clearly large enough to accommodate the proposal in theory, any standalone proposal for a discount foodstore would present a clear policy conflict with the LDP allocation for residential use and on this basis the site is considered unsuitable.

5.39. Due to the very close proximity of the recently approved Aldi store at Albany Street, Crindau, this site would not be commercially viable due to cannibalisation of trade. It is therefore not suitable.

5.40. Additionally, the site is not located in a preferential location for a national multiple retailer. The site is located at the level of the River Usk, and no major roads run directly alongside it. The A4042 runs at high level close to the site but it does not provide direct access for vehicles and visibility of the site from the road is poor. Therefore it cannot be considered a suitable alternative to the application site due to its low prominence. Sainsbury's used to operate a store from the site but closed it so they could relocate to a large more high profile location at Crindau. This lack of prominence is likely to have been a factor in the relocation.

5.41. Finally, the site is predominantly situated within land classed as Flood Zone 3. This is a more vulnerable classification than the application site so it cannot be considered sequentially preferable.

5.42. In light of the above, the former Sainsbury's site on Wyndham Street is not a sequentially preferable alternative.

5.43. Following a search of the CCSA, edge-of-centre areas, and considering accessible out of centre locations, there are considered to be no sites that are suitable and available for the development proposed.

Caerleon Road District Centre

5.44. The District Centre, as defined by the LDP Proposals Map (2015) is located on the eastern side of the city, along a busy main road connecting Caerleon to the city centre. It is approximately 330m in length, starts at 131 Caerleon Road and runs to 209 Caerleon Road.

5.45. The District Centre comprises a number of traditional smaller units along the road. The largest unit of which is the SPAR at the northern end of Caerleon Road. This unit if available would be too small to provide an Aldi style discount foodstore with associated parking and deliveries.

5.46. In conclusion, the configuration of the centre is unlikely to yield any vacant units or indeed any amalgamation of vacant units to accommodate a foodstore of the nature proposed, even when applying an appropriate degree of flexibility.

5.47. Additionally, on the edge of the District Centre, the presence of established residential properties indicate that there are no suitable or available sites for the proposed development in this location.

5.48. We conclude there are no suitable and available sites in or on the edge of the District Centre. This same conclusion was reached by Nexus Planning in its evaluation of the Aldi Crindau application.

Malpas Road District Centre

5.49. Malpas Road District Centre is located at the southern end of Malpas Road, close to the Old Green roundabout. The existing centre is made up of two distinctive parts. The most southern section includes two large retail units on the Discovery Retail Park.

5.50. The northern section is on Malpas Road and comprises two parades of shops running along each side of the main road. This is the more traditional northern section of the district centre. This area is made up of many smaller units which do not lend themselves to amalgamation and/or land assembly, meaning that the available units in the centre are not considered suitable for the development proposed and its associated requirements.

5.51. The southern section currently houses the existing Barrack Hill Aldi store that will close when the recently approved Crindau store opens. This site is no longer fit for use by Aldi due to its very small net sales area (650 sq. m). Also within the southern section is Wickes, which is currently trading.

5.52. This site is also too close to the proposed Crindau store so it would not be a viable alternative to the application site due to cannibalisation of trade.

5.53. Immediately adjacent to the southern boundary of the District Centre large office building, industrial premises and associated car parks, accessed via Factory Road and Lucas Street. This represents a potential development opportunity. However, if the site were available, this would lead to the loss of a large employment use. The site is therefore unlikely to be available for development.

5.54. The character and pattern of development in the surrounding areas, therefore does not yield any suitable or available sites for the proposed development.

5.55. Following a search of the centre and edge-of-centre areas of Malpas Road District Centre, there are considered to be no sites that are suitable and available for the development proposed.

Clarence Place Local Centre

5.56. Clarence Place District Centre is located to the east of the River Usk, just after Town Bridge. It is in close proximity to the city centre, with Newport's central shopping area located within walking distance. Rail infrastructure forms a hard boundary to the north of the Centre, residential terraces to the south and south east.

5.57. The Local Centre comprises mostly small units, which are positioned on both sides of the main road. The northern side is however, different in character and design to the southern side, with several large 1960/70s units over sailed by a multi-storey car park. The southern side consists of a row of terraced properties and is more traditional in character.

5.58. The largest units are the Grade II listed Neon Theatre, Kwik Fit and the Iceland in Clarence Place. None of these sites are suitable spaces or likely to be able to come forward in the short to medium term.

5.59. The area immediately surrounding the centre is predominantly residential in nature and so there are also no edge-of-centre sites available or suitable to accommodate the proposal.

5.60. In conclusion, there are no sites that are suitable and available for the proposed development.

Handpost District Centre

5.61. Handpost District Centre is located approximately 1.5km walking/driving distance from the application site.

5.62. The centre is focussed on the Hand Post Hotel at the junction of Risca Road and Bassaleg Road. The centre comprises mostly very small units and has a high percentage of Class A5 units.

5.63. There are very few vacant units, and there are no units that are large enough to accommodate the proposed development. There are also no known development sites which could accommodate the proposal.

5.64. The area immediately surrounding the centre is predominantly residential in nature and so there are also no edge-of-centre sites available or suitable to accommodate the proposal.

5.65. In conclusion, there are no sites that are suitable and available for the proposed development.

Smaller Local Centres

5.66. There are a number of very small local centres located in the western half of Newport, including Bassaleg Road, Gaer Road, Maesglas Avenue/Cardiff Road, and Greenfield Road. These are typically rows of five or six very small retail units, with minimal parking available, which perform a highly localised retail function.

5.67. Given their very small size, there are no sites within these centres which could accommodate a store the size of the proposed development.

Sequential Assessment Conclusions

5.68. On the basis of the above information, we conclude that there are no alternative sequentially preferable sites within the town centre or in edge-of-centre locations elsewhere within the primary catchment area.

5.69. The proposed development site is considered to represent the only site that is suitable, viable and available for the type of development proposed. We therefore conclude that the site complies with the sequential approach to site selection and in particular Policy R10 of the Newport LDP and paragraphs 4.3.18 to 4.3.24 of PPW.

6. Retail Need and Impact Assessment

6.1. This section of the report sets out our assessment of the economic implications of the proposed Aldi development. The retail need and impact analysis is presented as a series of tables, which are included in Appendix 1.

6.2. It is accepted that the application site is in an out-of-centre location in retail policy terms and that it is therefore subject to the retail need, impact and sequential site assessment tests set by PPW, TAN4 and Newport LDP Policy R10.

6.3. The proposed floorspace (a total of 1,804 sq. m) is below the relevant threshold for the retail impact test set by national policy (2,500 sq. m gross). The LDP does not set a specific local threshold, although it is noted that the supporting text to Policy R10 states that *"Any* [out of centre] *schemes submitted will need to be accompanied by a retail impact assessment and sequential test."* (para. 8.32). As a result, and to aid determination of the application, an assessment has been prepared.

6.4. As set out previously, the current retail policy evidence for Newport is the Newport Retail and Leisure Study November 2019, produced by Nexus Planning, and published in November 2019.

6.5. As the evidence and findings of the 2019 Retail Study are considered up to date, we have undertaken a need and impact assessment that utilise this data, which has been updated where required using more up to date information (such as the proposal's company average sales densities).

6.6. The assessment adopts 2020 as the base year and considers retail need and impact in 2025. This is considered to represent an appropriate timeframe for the nature of development proposed.

6.7. We consider this represents a clear, logical and transparent method using robust and realistic evidence (as required by TAN4 paragraph 6.3).

6.8. In undertaking this process, we have adopted the 'existing' turnover of convenience goods facilities based on the results of the household survey undertaken for the 2019 Retail Study. We have then assessed the implications of recent planning commitments to establish a new 'baseline' turnover position in 2025. These commitments have already been the subject of planning applications that have been considered and found to be acceptable by the LPA.

6.9. We have then assessed the implications of the proposed Aldi store development from the baseline position following the development of the commitments.

6.10. Our analysis relates only to the convenience goods impact of the proposed Aldi store. Aldi stores are a predominantly convenience goods shopping destination with only a small element of floorspace given over to comparison goods (typically 20%). Additionally, as outlined in Section 3 of this Report, the comparison goods on sale in an Aldi store are predominantly temporary in nature. The products are typically time limited 'special buys' and once the goods are sold, they are not restocked. As a result, the non-food comparison goods are ancillary to the primary purpose of the proposed store and are considered *de minimis*.

Assessment

6.11. The proposed development is a discount foodstore with a gross floorspace of 1,804 sq. m, a net sales area of 1,315 sq. m, and a convenience goods sales area of circa 1,052 sq. m (80%). The application is submitted on the basis that Aldi will be the end-user, and this is reflected in our assumptions below.

6.12. The assessment directly addresses the policy context as set out in Section 3 above, including the retail need and impact 'tests' identified in both PPW and TAN4.

Methodology

6.13. Drawing on the empirical data provided within the 2019 Retail Study, we have adopted a conventional step-by-step, trade draw methodology to assess retail impact. This is based on an estimate of store turnover (and supporting catchment area expenditure) in the 'design' year, and a series of judgements (informed by the evidence base) relating to the proportion of turnover estimated to be diverted from existing centres and stores.

6.14. To ensure that a suitably fine-grained analysis of retail impact is presented, we have adopted a 'trade draw' approach to modelling the effects of the proposed development. In doing so, we have utilised the household survey data provided within the 2019 Retail Study to model existing trade draw patterns across the catchment area (consistent with the 2019 Study).

6.15. We have used the existing data to inform judgements about from which of the seven survey zones the application proposal is likely to draw its trade. Our assessment identifies existing stores and shopping destinations within those zones from which the proposal will specifically divert existing convenience goods retail expenditure.

6.16. These judgements reflect factors such as scale, nature of retail offer, location/distance, and extent of 'trading overlap' (or competition), underpinned by the principle of 'like competing with like'. Proximate facilities with a similar catchment, and trading in the same market sector, will experience the greatest impacts applying these assumptions. Conversely, distant facilities of a differing scale and nature (such as local facilities and convenience stores catering for day-to-day needs) will be far less likely to experience diversion of trade.

6.17. This methodology is widely applied in retail assessment work and reflects that advocated in relevant national policy (e.g. TAN4 paragraph 6.3). The approach is considered to be logical, robust, transparent and proportionate.

6.18. There are seven main steps underlying this approach:

- Step 1: define a catchment area and quantify population and spending
- Step 2: identify base and design years for the assessment
- Step 3: estimate the turnover of existing centres and retail destinations
- Step 4: identify the benchmark turnover of existing facilities based on published information relating to company average turnover, and compare this with survey derived turnover. This provides an assessment of retail capacity and 'need' for additional floorspace

- Step 5: estimate the turnover of the application proposal and any relevant existing retail ‘commitments’.
- Step 6: apportion the turnover of the subject proposal to stores/centres using a trade draw methodology, based on an understanding of location/proximity and the extent to which the proposal will compete with existing facilities (centres and schemes in the same market sector having the greatest propensity to divert trade from comparable facilities).
- Step 7: quantify trade diversion (impact) and assess the significance of the predicted impacts for established centres.

6.19. Impact is expressed as a percentage of existing centre/retail destination turnover diverted to the proposal in the design year.

6.20. If retail capacity is identified through Step 4 of the process, this is an indication that existing floorspace is trading at levels higher than might normally be expected and is an indication of quantitative capacity and qualitative need for additional floorspace in the relevant catchment area.

Assumptions and Assessment Parameters

6.21. The principal supporting assumptions and assessment parameters adopted within our analysis are as follows:

6.22. Base and design years: base year of 2020 and design year of 2025. The base year is the current year and reflects the earliest year in which planning permission might be granted. Should planning permission be granted for the proposal, Aldi intends to open the store in 2023, and a mature trading position is expected to be established fully by 2025.

6.23. Price Base: constant 2017 prices. This is consistent with the 2019 Retail Study.

6.24. Catchment Area: based on the characteristics of the proposal (i.e. a discount foodstore) the catchment area adopted reflects that used within previous comparable assessments and adopts a primary catchment area based on Zones 1 – 7 of the 20149 Retail Study. This allows for a more accurate picture of trade draw and impact across Newport.

6.25. Population and Expenditure: Population and expenditure data has been sourced from Table 1 of Appendix E of the 2019 Retail Study. The population data has been grown (to the forecast year) using growth rates set out for the Newport area by Stats Wales (consistent with the 2019 Retail Study). Expenditure data has been grown using growth rates set out in Figure 1a of the Experian Retail Planner Briefing Note 17 (February 2020).

6.26. Turnover of existing convenience stores: derived directly from the results of the 2019 Retail Study.

6.27. Retail Capacity: by comparing the benchmark (or Company Average) turnover of existing facilities with survey-derived turnover, an assessment of retail floorspace capacity can be identified in future years (Appendix 1, Table 9).

6.28. Turnover of proposal: calculated from net floorspace and the sales density of Aldi derived from Mintel Retail Rankings. The resulting 2020 sales densities are

£12,078/sq. m. for convenience goods and £10,352/sq. m. for comparison goods.

Retail Need Assessment

6.29. The analysis is set out in a series of tables in Appendix 1. The assessment shows the following:

Population and Expenditure (Tables 1 to 3, Appendix 1)

6.30. Table 3 shows the available convenience goods expenditure generated by the resident population within the City, broken down into seven zones. This is derived from the population and expenditure data within Tables 1 and 2. The total available convenience goods expenditure is projected to increase at a modest rate from £299.6 million in 2020 to £307.7 million in 2025.

Shopping Patterns (Table 4, Appendix 1)

6.31. Table 4 shows the existing distribution of convenience goods shopping trips as derived from Table 3 of Appendix E of the 2019 Retail Study. This illustrates the distribution of 'main-food' / 'top-up' trips within the total catchment (expressed as a percentage of visits to the identified destinations). For example, 17.3% of Zone 1 of respondents undertake their main food shopping trip at Aldi, Barrack Hill, and 6.1% undertake their 'top-up' trips at the same destination.

Survey Derived Turnover of Stores at 2020 and 2025

6.32. Table 5a applies the shopping patterns from Table 4 to the total expenditure at 2020 (as set out in Table 3). This generates the total convenience turnover of each identified destination (split into main and top-up expenditure) from residents within Zones 1 to 7.

6.33. Table 5b provides a composite of all convenience shopping trips from each zone, and also provides an indication of each destinations' market share from each of the seven zones.

6.34. Table 6 applies the shopping patterns from Table 4 to the total expenditure at 2025 (as derived from Table 3) adopting a constant market share approach.

Turnover of the Proposal and Commitments (Table 7a, Appendix 1)

6.35. Table 7a sets out the estimated convenience and comparison goods turnovers of the Aldi application proposal in both the base year (2020) and design year (2025). These are based on data published by Mintel Retail Rankings (and verified by Aldi), which has been used to calculate convenience and comparison goods sales densities.

6.36. The net convenience sales area of the proposed store is 1,052 sq. m.

6.37. Applying a turnover ratio of £12,078/sq. m. to the net convenience floorspace generates a total convenience turnover estimate of £12.71 million in 2020, increasing to £12.96 million per annum in 2025 (with allowance for floorspace efficiency increases).

6.38. The table also sets out the turnover associated with other recently 'committed' convenience goods floorspace, specifically the approved Aldi at Crindau, the Lidl at Cardiff Road (South Wales Argus site), and the Iceland Food Warehouse at East Retail Park. Both the Aldi, Crindau and Lidl, Cardiff Road commitments represent store relocation developments (the existing stores at Barrack Hill and West Retail Park respectively, will close). As a result, Table 7a sets out the increase in turnover associated with the uplift in floorspace only.

Assessment of Convenience Goods Capacity (Tables 8 and 9, Appendix 1)

6.39. Table 8 of our assessment sets out the turnover of existing stores/floorspace within the catchment area based on a 'benchmark' (or company average) turnover ratio. This data has been sourced from the 2019 Retail Study, and provides an identification of the trading performance of existing facilities if they were trading at company average levels. This demonstrates that the benchmark (company average) turnover of existing destinations is £466.31m per annum in 2020.

6.40. Table 9 sets out a specific capacity analysis when the survey-derived turnover of existing facilities (with allowances for expenditure inflow to the catchment area) is compared with the 'benchmark' turnover.

6.41. This indicates that based on the results of the household survey undertaken to inform the 2019 Retail Study, there is no quantitative capacity for new convenience floorspace within the catchment. At 2020 it is indicated that there is a surplus of existing convenience goods floorspace equating to £166.75m per annum. Once existing convenience goods commitments are taken into account, this surplus increases to £194.93m in 2020, and to £196.72 by 2025.

6.42. Although we acknowledge that this is based on an empirical assessment undertaken within the 2019 Retail Study, we remain sceptical that it presents a truly accurate representation of retail performance in the city. For example, it suggests that as a whole, convenience goods floorspace is trading at c. 40% below company average. We do not consider that such a level of underperformance is truly representative, and it is not reflected through qualitative assessments or store visits/inspections.

Qualitative Need

6.43. Notwithstanding the absence of quantitative capacity (on the basis of the 2019 Retail Study), it is also necessary to consider whether there is a qualitative need for an application proposal. It is important to recognise that the proposed new store facility will enhance the local convenience goods retail choice, and improve competition and choice in the local area. The proposal will help to reduce unnecessary journeys to stores located farther afield, and will provide a destination within an area of Newport that has been the subject of significant residential development in recent years. The store will therefore address a qualitative need for new foodstore provision.

6.44. Paragraphs 4.3.13 to 4.3.17 of PPW provide useful guidance with reference to the application of the 'need' test. It is noted, that paragraph 4.3.15 advises that precedence should be given to quantitative need, but when qualitative need is considered, the advice confirms that consideration should be given to both positive and negative aspects.

6.45. PPW provides examples of where qualitative need may be an important consideration. The examples of qualitative need stated are not exhaustive, but a number are considered relevant in this instance. Among other matters, the advice notes that qualitative need may be an important issue for a development where it addresses the following:

- Is highly accessible by walking, cycling or public transport;
- Contributes to a substantial reduction in car journeys;
- Assists in the alleviation of over-trading of, or traffic congestion surrounding, existing local comparable stores;
- Addresses locally defined deficiencies in provision in terms of quality and quantity, including that which serve new residential developments.

6.46. All these matters are present and are relevant with regard to the assessment of the application proposals. Notwithstanding the consideration of quantitative need, qualitative need exists that is sufficient to demonstrate that the 'need' test set by relevant policy is met in this case.

6.47. It is important to note that the nearest Aldi store to the application is currently at Barrack Hill, which is over a ten minute drive to the north-east. Following the development of the new Crindau store (Albany Street), the nearest Aldi will be even further away. The western half of Newport currently has no alternative Aldi store, and there is a clear gap in provision for a settlement of this size.

6.48. The application site lies immediately adjacent to a large new area of housing: approximately 575 family houses have been constructed on the former railway sidings land in the past 8 years, and the immediate local area does not currently benefit from an easily accessible foodstore. Developing a foodstore at the application site would provide such destination for this area to undertake both main and top-up shopping trips without the need to travel by car. A footpath is already in place, which links the application site to the wider residential area.

6.49. The site is also located close to Cardiff Road, which is a main bus route with a wide variety of services accessible via bus stops closest to the application site. These routes provide six buses per hour in each direction and link the site to destinations and residential areas such as Newport city centre, Ringland, Bassaleg, Maeglas, and Duffryn. Given the site is in such an accessible location, it provides a valuable opportunity to help reduce the requirement for people to travel by private car, which has sustainability benefits and is an indicator of qualitative need highlighted by PPW.

6.50. The Council's own evidence base provides a clear indication of 'over-trading' of the two existing Aldi stores in Newport. For example, the Aldi at Barrack Hill has a survey derived turnover in 2020 of £17.01m, whilst its benchmark (or company average) level of performance would be £7.17m. It is therefore evidence that the store is currently trading at more than twice the level of its assumed benchmark. Similarly, the Aldi at Spytty Road has a survey derived turnover that is 120% of its benchmark,

6.51. This demonstrates the popularity of the Aldi business model, and in the absence of an alternative Aldi store to the west of the city is a clear indicator of a qualitative requirement for a store in this area. The west of the city has one other deep discount convenience retailer, which is the Lidl at West Retail Park (which will be replaced by the new Lidl at the South Wales Argus site). The proposed development will therefore increase customer choice for residents in this part of Newport, promote healthy competition between retailers, and improve the quality and price of produce for shoppers.

6.52. In summary, it is considered that there is a clear qualitative need for a deep discount supermarket in the area. This is demonstrated by over-trading of existing Aldi stores and the proposal will help to reduce the requirement to travel further afield to undertake food shopping, help to retain expenditure in the local area, and promote competition between stores. The application site is located in an accessible location and provides a good opportunity to address these deficiencies, particularly following the recent residential development that has taken place in the local area.

Conclusions on Need

6.53. Based on the assessment set out above and in Appendix 1, we conclude that although there is no quantitative requirement for additional convenience goods floorspace, there is a clear qualitative need. The proposed store will address a deficiency in the western part of Newport, and the application site provides an accessible location at which these issues are capable of being addressed.

Waterstone Estates Limited – Court of Appeal Judgment (July 2018)

6.54. We are aware that the Waterstone Estates judgment is often referenced with regard to the consideration of the retail 'need' test. It is important to note that within that judgment, although it is confirmed that the establishment of retail 'need' is a discrete requirement of planning applications (for retail development outside town centres), that is not the end of the matter. The judgment confirms (paragraph 70) that:

> *"It is not true to say that if an application for planning permission for new retail development cannot establish need then that is fatal to the application. National planning policy is of course a material consideration; but a policy is only a policy. If a particular policy requirement is not met, it must be open to the decision maker to grant planning permission if other material considerations outweigh identified planning harm including harm that results from a failure to comply with that requirement. <u>Even proposed development that is contrary to the local development plan</u>, which has the entrenched importance given to it by Section 38(6), <u>may be granted planning permission if other material considerations outweigh that inconsistency</u>."* (Our emphasis).

6.55. We consider that a retail need *does* exist for the application proposal and that the relevant test is passed, but in any event there are weighty material considerations that justify the grant of planning permission.

Retail Impact Assessment

6.56. Tables 10-12 set out a retail impact assessment, both of the application proposals and in relation to the relevant retail commitments in the catchment area. These tables are based on the preceding analysis used to inform the capacity assessment, which use the 2019 Retail Study as an evidence base.

6.57. As set out above, the impact assessment has been undertaken on the basis that the existing retail commitments are completed before the current Aldi store proposal comes forward. In any event, it is assumed that the earliest the application proposal will be developed is by 2023 and that trade patterns will be settled by 2025.

Retail Impact of Commitments at 2025 (Table 10, Appendix 1)

6.58. Table 10 sets out an estimation of the retail impact from the already approved retail commitments. These commitments are:

- Iceland Food Warehouse at 28 East Retail Park
- Lidl store at the South Wales Argus site (which will replace the Docks Way store), and
- Aldi at Albany Street in Crindau (which will replace the Barrack Hill store).

6.59. Our assessment of trade diversion associated with these committed developments has been undertaken by reference to the assumptions contained within documents prepared in support of those applications, and is undertaken on the basis that the Iceland/Food Warehouse store will be developed first, followed by the Lidl store and the Aldi at Crindau.

6.60. Table 10 indicates that all three commitments result in low levels of retail impact on centres or destinations that are subject to retail policy protection – the greatest impact being a modest -5.8% on the Iceland at Clarence Place. This is no doubt why all three commitments have been granted planning permission by the LPA.

Retail Impact of the Proposal at 2025 (Tables 11 and 12, Appendix 1)

6.61. Table 11 sets out a trade draw model to help inform judgements regarding the likely impact of the application proposals. This uses the results of the 2019 Retail Study to consider how existing trade patterns might inform the impact of the application proposal – for example, using the broad patterns of expenditure present across Newport, we consider that the application proposal will not draw its turnover consistently across all seven zones. This reflects the proximity of relevant catchment areas and the relative popularity of existing facilities in each zone specifically.

6.62. The store is estimated to draw its trade from the seven zones as set out below:

- Zone 1: 7% (£0.91m per annum)
- Zone 2: 3% (£0.39m pa)
- Zone 3: 22% (£2.85m pa)
- Zone 4: 1% (£0.13m pa)
- Zone 5: 55% (£7.13m pa)
- Zone 6: 10% (£1.3m pa)
- Zone 7: 2% (£0.26m pa)

- Total 100% (£12.96m pa)

6.63. Table 11 then models the pattern of trade draw across each of the relevant destinations using the current pattern of expenditure provided through the 2019 Retail Study (and derived from our Table 5a).

6.64. This approach provides an indication of the total amount of trade drawn from each respective destination, but if it were applied directly it would not, in our opinion, allow for an appropriate level of judgement regarding the application proposal's actual propensity to divert trade. As a result, Table 11 provides an indication to which professional judgement should be applied, and adjustments made where necessary.

6.65. The final column of Table 11 sets out where our judgements have been applied and the trade diversion adjusted accordingly. Trade draws to the Aldi proposal are based on the strength, proximity and nature of competing provision, and the premise that 'like competes with like'.

6.66. Stores within Zone 5 which cater primarily for main food shopping, such as the Asda at Pencarn Way, Tesco Extra at Harlech Retail Park, and the proposed Lidl at Cardiff Road are therefore estimated to experience the greatest competitive effects (and trade diversion) following the introduction of the new Aldi store.

6.67. The adjusted trade diversion figures are then used in Table 12 to calculate the level of impact on each destination.

6.68. Table 12 lists the destinations within the catchment area with the survey derived turnovers at 2025. The adjusted trade diversions from Table 11 are then listed and these are applied to the turnover of the proposal. This monetary impact is then subtracted from the 2025 turnover to give a resultant turnover, post-development. The monetary impact is then expressed as a percentage impact figure against the survey derived turnover (after the commitments have been taken into account).

6.69. The highest impact observed as a result of the proposed Aldi store would be experienced by the out of centre Lidl at Usk Way. The impact from the Aldi store (together with the commitments) would be -26.9%. However, this store is not located within a designated centre and therefore does not benefit from policy protection. Furthermore, the survey derived turnover of the Lidl at 2025 (before taking into account commitments) is £1.7m which is extremely low, and unlikely to be accurate.

6.70. The second largest impact would be experienced by the proposed Lidl at Cardiff Road (20.8%). Similarly, this store is not subject to policy protection due to its location.

6.71. The designated centre experiencing the largest cumulative adverse impact is anticipated to be the Iceland at Newport Retail Park, which will experience an impact of -5.9%. However, the wider Retail Park is classed as the defined centre, which also includes Tesco Extra and Marks and Spencer Food Hall. Additionally, impact relates to the centre as a whole, not just the convenience floorspace. The total comparison turnover of the Retail Park is approximately £122m[1], so the identified convenience monetary impact of £1.1m (the impact on the Iceland and

[1] See Table 25 of Appendix E of the 2019 Retail Study

Tesco Extra summed together) is negligible. Such a low level of impact cannot be considered to be 'significantly adverse'.

6.72. Additionally, the Asda at Lower Dock Street in Pillgwenlly is within an allocated centre. This will experience an impact of -5.8%. Similarly to the above, this figure does not include the comparison floorspace within the centre (which just comprises the Asda store). The comparison turnover of the store at 2020 is £7.5m, so the monetary impact of £1.3m equates to a total impact of 4.3%. This is a low level of impact, and certainly below a 'significantly adverse' level.

Assessing the Significance of Impact for Existing Centres

6.73. As noted above, TAN4 (paragraph 8.3) identifies the impact considerations against which planning applications for retail uses (on the edge of or outside retail and commercial centres) should be assessed.

6.74. These tests apply to all proposals for retail development above 2,500sqm gross. Smaller proposals (such as the application proposals) may also be assessed where LPAs believe they will have a significant impact on a retail or commercial centre.

6.75. Paragraph 8.3 of TAN4 advises that such assessments should be considered against a range of criteria, for example:

- The impact on existing, committed and planned public and private investment in centres;
- The impact on centre vitality and viability;
- The consideration of cumulative effects;
- The impact of the proposal on allocated sites outside centres being developed in accordance with the development plan;
- The impact on in-centre trade and turnover, taking account of current and future expenditure capacity;
- An assessment of the proportion of customers travelling by different modes of transport;
- The impact on travel patterns;
- Any significant environmental impacts.

6.76. We consider the potential impact of the proposed development against these criteria below.

Investment Impacts

6.77. We are not aware of any planned investment in centres that might be affected by the proposed development. In any event, the levels of impact identified in our quantitative assessment are low in absolute terms. This level of diversion would not in our view deter future investment in the existing centres or undermine investor confidence in the deliverability of future centres.

6.78. We therefore conclude that there are no alternative investment that would be impact by the application proposals.

Vitality and Viability, and In-Centre Trade/Turnover

6.79. Having regard to the conclusions of the retail impact assessment as set out above, and the nature and function of the town centres' retail offer, we do not consider that the Aldi proposal would undermine the vitality or viability of existing centres, or the level of trade. Any identified impacts upon defined centres are well within acceptable parameters, and are not classed as 'significantly adverse'.

6.80. The significance of impact, rather than evidence that some trade will be diverted from existing centres, is the primary consideration. In this case, our analysis indicates that the Aldi store will divert some expenditure from existing centres, but not to the extent that such impacts could be considered significant or give rise to policy conflict.

6.81. We therefore conclude that retail impact on vitality and viability is acceptable in planning policy terms, and that in-centre trade and turnover will not be materially affected by the application proposals.

Cumulative Effects

6.82. As set out above, our assessment has considered the recent commitments for convenience goods facilities. The impact figures calculated in Table 12 of Appendix 1 and referred to above are robust, as they are cumulative figures, including the three commitments.

6.83. We are not aware of any other material development or unimplemented planning permissions that require a cumulative assessment. We therefore conclude that the proposals do not give rise to materially significant cumulative effects.

Impact on In-Centre Trade/Expenditure Capacity

6.84. As set out above, our impact analysis confirms that impact on in-centre trade and turnover will be within commonly acceptable limits.

6.85. Although our assessment does not identify a quantitative need (i.e. expenditure capacity), this is only one element of the policy considerations, and must be balanced against the other positive impacts.

6.86. Furthermore, we understand that Newport has one of the highest delivery rates of new housing in Wales and as a result, population and resulting growth in expenditure is likely to create additional capacity for facilities in the short to medium term.

Impact on Travel Patterns/Transport Modes

6.87. This is considered in more detail in the accompanying Transport Statement. As there is no Aldi store in the western area of Newport, it will help to reduce the requirement to travel to the existing stores for Aldi shoppers in this area.

6.88. We therefore consider that the proposals will assist in minimising unnecessary journeys and reducing trip lengths.

Environmental Impacts

6.89. Given the nature of the application site and the information submitted in accordance with the application proposals, we do not consider that there are any significant environmental impacts associated with the proposed development.

6.90. Furthermore, as set out above, the reduction in trip lengths and reducing the need to travel will have a beneficial environmental impact due to the reduction in emissions.

Conclusions on Retail Need and Impact

6.91. We have assessed the quantitative and qualitative need for the proposals, and considered the likely impacts, having regard to the relevant policy considerations set out at the national and local level. We make the following key conclusions:

- There is no identified quantitative capacity for new floorspace within the catchment. However, we remain sceptical that it presents a truly accurate representation of retail performance in the city. Furthermore, given the Waterstone Estates judgment, need is just one consideration in the application as a whole.
- There is a clear qualitative requirement for a new store in the western part of Newport, and the application site provides an accessible location to address the identified deficiency.
- Impacts associated with the proposal at 2025 are low and represent no threat to the vitality and viability of the existing centres.
- The proposal represents no threat to planned investment in any of the existing centres in the catchment area.

6.92. When impacts are assessed against the relevant criteria set out in national policy, the impacts are considered low and the proposal is accordingly in compliance with relevant national and local retail guidance.

6.93. On the basis of the foregoing analysis, we conclude that the application proposal complies with the tests of ‘need’ and ‘impact’.

7. Other Material Considerations

Economic Development

7.1. The proposed store will provide up to 40 full and part time jobs (a full-time equivalent of 27) at a range of levels of seniority.

7.2. Rates of pay at Aldi are the highest in the grocery sector. Starting hourly rates for shop floor staff are £9.40/hour which is well above the Living Wage, and store managers can earn up to £60,000/annum.

7.3. These jobs will increase spending power for employees, and their wages/salary could be spent in local businesses in and around Newport, therefore having further economic benefits on those businesses.

7.1. It is Aldi's preference to recruit staff locally. 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.

7.2. 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.

7.3. 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.

7.4. 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.

7.5. The provision of new jobs would meet Objective 3 of the Local Plan which states requires 'Economic Growth To enable a diverse economy that meets the needs of the people of Newport and those of the wider South East Wales economic region.'

7.6. The proposal would help meet the target set out in para. 1.30 of the Local Plan of creating 7,400 new jobs over the plan period.

7.7. The proposal accords with Para. 4.0.2 of PPW (2018) in that planning authorities need to ensure that residents of existing and new communities have access to jobs.

7.8. On this basis, it is considered that the principle of development of the site for retail uses would have significant positive impacts and therefore would support the broader economic objectives of the LDP.

Employment Land Provision

7.9. This site represents an excellent opportunity to deliver a multi-million pound investment, and provide beneficial economic development through the development of an Aldi discount foodstore.

7.10. Due to the lack of constraints and the sustainable location of the site, this site has the potential to come forward as a discount foodstore, and realise the considerable benefits for Newport and the surrounding area as early as 2021 or 2022. Furthermore, an Aldi store is an employment generating use, and the proposals would provide jobs in retailing contributing to general Local Plan and PPW aims for economic growth, providing a timely boost to the local economy.

7.11. Although the site is currently undeveloped, the employment allocation demonstrates that it is appropriate for development. Furthermore, the delivery of an Aldi store on this site will provide a valuable facility to support the day to day needs of the existing and future residents of the area.

7.12. As set out in Section 2, the Section 106 Agreement for the Planning Permission Ref: 07/0540 for the wider residential development referred to the application site.

7.13. Clause 2 (Schedule One) requires the land to be marketed for employment purposes for a period of 2 years before other land uses can be considered.

7.14. The Section 106 states:

> Schedule One (White Land)
>
> 1) *The Owner and/or the Developer shall reserve an area comprising 1 2 ha of the Site for possible employment purposes the size and location of which are to be in accordance with the draft master plan.*
>
> 2) *The Owner and/or the Developer shall undertake at its own cost a joint marketing strategy for a period of two (2) years following the service of the Implementation Notice to seek a commercial developer to secure and promote the employment land for employment/commercial purposes*
>
> 3) *The Council will be invited to participate in the marketing strategy This marketing strategy will seek to identify a commercial developer or end-user and will restrict the ability of this relevant party to apply for B1 planning uses only In the event that the marketing strategy does not identify a commercial developer who is willing to proceed then the Owner and/or Developer will discuss with the Council the potential future planning uses of the land*
>
> 4) *If a commercial developer is identified then the Owner and/or Developer will assist the commercial developer in securing planning permission for B1 planning uses.*

7.15. The supporting information which demonstrates that the site was marketed for the required time, and confirmation from Newport City Council is included at Appendix Two.

7.16. In accordance with Policy EM3 for development proposal promoting alternative uses on existing employment sites, the site has been marketed unsuccessfully for employment purposes for a minimum of 12 months, there remains a sufficient range and choice of employment land and premises to meet LDP requirements and local demand, the development has no adverse impact on existing or allocated employment sites, and the development has no adverse impact on amenity or the environment.

Design and Layout

7.17. Careful consideration has been given to the scale and massing of the proposed, which has been informed by the existing site's layout, context, existing features and topography. The operational and servicing requirements of the store were also an important factor informing the final design proposals.

7.18. The application site has several constraints which has affected the layout of the development. Included at Appendix 3 is a plan which shows the site constraints.

7.19. In summary these constraints are:

- The site is an irregular shape
- Network Rail has a 20 metre 'no-build zone' from the edge of the railway land for safety reasons
- Along the northern boundary of the site is a steep embankment
- A pedestrian footpath runs around the majority of the northern and western boundary of the site
- The northern and eastern parts of the site features a level plateau

7.20. The above constraints restrict where the proposed store and car park could be accommodated on the site. Within Appendix 4, four alternative site layouts are presented. These layouts are not feasible on the site for many reasons, including the requirement for substantial retaining walls, encroachment in the 'no-build zone', the car park being split across two areas, safety concerns in respect of a combined customer and service access, and the store being even closer to the residential properties.

7.21. In light of the above issues, the only viable layout for the proposed development is the one shown on Drawing Ref: 180420-1410-P1 Proposed Site Plan Concept II.

7.22. The proposed design of the proposed foodstore will create a modern and contemporary building that will improve the street scene along Cardiff Road.

7.23. The layout of the proposed Aldi site is designed to produce an uncluttered and attractive environment for customers, which retains the existing open nature of the site and promotes safe vehicular and pedestrian movement through the site, and surrounding area.

7.24. The site is a long term vacant site and so will improve the appearance of the site and bring it into a viable use.

Local Neighbour Amenity

7.25. The site is located on the edge of a residential area, and so the potential for the proposed development to lead to disturbances to neighbour amenity has been fully considered.

7.26. The service yard will be enclosed by a 3m high acoustic fence, which will include a solid sliding gate across the yard entrance.

7.27. The store is proposed to be restricted to servicing hours of between 07:00 and 23:00 Monday to Sunday. This restriction will prevent servicing activities taking place during night time hours.

7.28. The Noise Assessment undertaken by Sharps Redmore finds that overall when considering the outcomes of all three assessment methods used, it is concluded that Aldi deliveries could be made between 0700 and 2300 hours without associated noise giving rise to significant adverse impact.

7.29. The Noise Assessment undertaken by Sharps Redmore and submitted with this application concludes that based on a thorough assessment against objective standards, noise associated with the proposed development would comply with the objectives of PPW to *"prevent adverse effects to amenity, health and the environment…"*.

7.30. Aldi is committed to being a good neighbour, and so noise and lighting impacts have been considered from the start of the design process. Any disturbances will be kept to a minimum, and as set out within the Noise Impact Assessment.

7.31. The external lighting for the site has been designed to reduce light spill and therefore off-site impacts. The lighting details are set out on Drawing Ref. B2340 P186-480 Aldi Newport Mon Bank Ext Luxplot.

7.32. The store manager will quickly become familiar with local residents, and will act as a point of contact if any local issues arise. Aldi has demonstrated across the UK that it is a responsible neighbour, and will work closely with the community to ensure this continues.

Flooding

7.33. The site falls almost entirely within the TAN15 Development Advice Map Zone B and as such any development proposals need to respond to flood risk.

7.34. A Flood Consequence Assessment (FCA) and Drainage Strategy for the site has been prepared by Craddys. The objective of this report was to assess the flood risk to the site and assess whether the proposed development meets the requirements of TAN15.

7.35. TAN15 states that sites in Flood Zone B should have their proposed levels checked against the 0.1% extreme flood level. If site levels are greater than the flood levels used to define the nearest extreme flood outline, then there is no need to consider flood risk further.

7.36. The developable land at the application site is 15m AOD, this is significantly higher than the 0.1% flood level (9.68m AOD), and so is therefore not considered to be at risk of tidal or fluvial flooding.

7.37. As the site is less than 1 hectare, surface water at the site is unlikely to have a significant impact on local flooding.

7.38. As the site is over 100 sq. m, the proposal is subject to a SuDS Approval Body (SAB) application. This is a separate process to the planning application. On the Proposed Soft Landscaping Plan, several areas to accommodate SuDS features have been included but not detailed yet.

7.39. The wider Mon Bank area has its own drainage system, and this was designed with an allowable discharge from the application site. The wider site includes an attenuation pond and below ground geocellular attenuation storage.

7.40. In summary, the FCA and Drainage Strategy demonstrates that the proposed development on the application site will not lead to an increase in the risk of flooding at the site or surrounding area. It is therefore compliant with the relevant local and national policy tests.

Ecology

7.41. A preliminary ecological appraisal of the site was undertaken by Tyler Grange in April 2020. An Ecological Assessment was then produced and forms part of this application.

7.42. The Report states that the site is currently predominantly of negligible ecological importance.

7.43. The proposed development will not adversely impact upon any important habitats, and the proposed planting at the site will include native or ecologically beneficial flora, which could provide foraging opportunities for fauna.

7.44. The development will include the planting of 26 new trees around the edge of the application site. Additionally, low level shrubs will be planted in and around the car park. This new planting will have a positive effect on the ecological value of the site.

7.45. In conclusion, the development will not lead to a loss of important habitats and will create an opportunity for a net gain in biodiversity. It is therefore in full compliance with Policy GP5 of the Development Plan and Chapter 6 of PPW which respond to Section 6 Duty of the Environment (Wales) Act 2016.

Highways and Access

7.46. A Transport Statement (TS) has been produced by Entran Limited, which accompanies this application. The submitted TS demonstrates that the proposals are consistent with local policy and the site access has been designed to provide safe and efficient access, for all modes of transport.

7.47. Based on the TRICS assessment the proposed development is expected to generate 130 trips in the weekday evening. Proposed trip generation rates have been obtained from TRICS surveys to form a reasonable and robust estimate of the expected development traffic from both the extant and proposed land uses to be minor and should not lead to any material effects on the surrounding local highway network

7.48. The information presented in the report has been presented to help the Council review the likely effects of the proposed development on the surrounding transportation network of a proposed ALDI discount food store together with the wider outline site proposals.

7.49. The traffic from the proposed development is therefore considered able to be accommodated on the local highway network without creating material issues or delay.

7.50. Consistent with local policy, the site access has been designed to provide safe and efficient access for all modes and ties into recent highway improvements;

7.51. Adequate car parking is proposed, commensurate with local parking standards together with the expected operation of the development proposal. Secure, covered and illuminated cycle parking spaces for the discount food store would be provided. In addition, the site supports the safe access and turning of service vehicles. The proposed parking for the store is as follows:

7.52. The site will include 112 parking spaces, which includes eight staff spaces, four disabled spaces, and 9 parent and child spaces. Four external Sheffield cycle stands are proposed (space for 8 cycles).

7.53. The car park will include provision for 20 electric vehicle charging points (EVCPs). Initially, two 'live' charging points will be installed, with the remaining 18 spaces having 'passive' provision. Those spaces with passive provision will have the below ground infrastructure already installed so can be upgraded easily when demand requires it.

7.54. The application also includes a Staff Travel Plan to encourage staff to use sustainable forms of transport.

7.55. Based on these findings, the development proposals are not expected to lead to any localised material off-site highways issues on the adjacent transportation network. It is therefore concluded that the impact has been fairly and reasonably addressed and there should be no reason for highways related objection to the proposed development.

Contamination

7.56. A Phase 1 Geo-Environmental Desktop Report has been prepared to review previous uses of the site and advise on the likelihood of contamination within the site.

7.57. Given the historic use of the site as a railway sidings, the Report states there is evidence to suggest the presence of made ground associated with railway workings and landfill may form a significant source of contamination.

7.58. The Report concludes that there is a medium to high risk to future users of the site from contamination.

7.59. In light of this it recommends intrusive surveys are undertaken including gas/groundwater monitoring, soil samples and exploratory holes to inform how to effectively deal with the contamination. These surveys can be dealt with via a condition should planning permission is granted.

8. Summary and Conclusions

8.1. This Planning Statement is submitted by Planning Potential, on behalf of Aldi Stores Limited in support of an application to construct a new Aldi store on land off Abberley Hall Road in the Mon Bank area of Newport.

8.2. The proposed store will measure 1,804 sq. m (GIA), and have a net sales area of 1,315 sq. m. The car park will have 112 spaces, including four disabled spaces, nine parent and child spaces, and 20 spaces for electric vehicles (two live, and 18 passive provision).

8.3. The proposed store will create up to 40 part time and full time new job positions (a full time equivalent of 27). This jobs will be at a range of levels of seniority, and will be a sector leading pay rates. Short term jobs will also be created through the construction process.

8.4. This Statement addresses all of the relevant planning policy considerations associated with the proposal, but should be read in conjunction with other documents and drawings submitted in support of this application.

8.5. In summary:

- There is a clear qualitative need for a discount food retailer in the western Newport area.
- Our assessment demonstrates that no defined centres will experience any ‘significant adverse impacts’.
- There are no sequentially preferable sites on which the proposed development could be accommodated.
- The requirement to market the site for employment uses took place for the required two year period and did not generate any genuine interest in the site from Class B operators.
- The development will generate significant economic benefits at a time when there is expected to be job losses due to Covid-19.
- There are no other technical considerations which would prevent the granting of planning permission.

8.6. On the basis of the consideration of the proposals set out in this Statement (and other supporting documents), we consider that the application proposals represent appropriate development and comply with relevant planning policy at all levels.

8.7. We therefore consider that when assessed against relevant planning policy, the ‘presumption in favour of sustainable development’ applies and the planning application should be granted permission.

Appendix One – Retail Assessment Tables

ALDI, Abberley Hall Road, Mon Bank, Newport

Table 1. Population

Year	**Zones** 1	2	3	4	5	6	7	**Total**
2019	34,392	8,668	39,872	21,604	21,596	6,223	16,888	149,243
2020	34,513	8,699	40,013	21,680	21,672	6,245	16,948	149,770
2021	34,637	8,730	40,156	21,758	21,750	6,267	17,008	150,308
2022	34,764	8,761	40,303	21,837	21,830	6,291	17,070	150,856
2023	34,891	8,793	40,450	21,917	21,910	6,314	17,132	151,407
2024	35,016	8,825	40,595	21,995	21,988	6,337	17,194	151,950
2025	35,139	8,856	40,738	22,073	22,066	6,359	17,254	152,484
Change 2020-2025 (No.)	626	157	725	392	393	114	307	2,714
Change 2020-2025 (%)	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%

Notes

Population data for 2019 and 2022 taken from Table 1 of Appendix E of Nexus Retail and Leisure Study November 2019

Population data grown using percentages sourced from StatsWales data for Newport

2019	2020	2021	2022	2023	2024	2025	2026
149,243	149,770	150,308	150,856	151,408	151,952	152,486	153,005
	0.353115	0.359217	0.364585	0.365912	0.359294	0.351427	0.340359115
	0.353%	0.359%	0.364%	0.365%	0.359%	0.351%	0.340%

ALDI, Abberley Hall Road, Mon Bank, Newport

Table 2. Convenience Goods Expenditure (Per capita)

Year	**Zones**						
	1	**2**	**3**	**4**	**5**	**6**	**7**
2019 (£)	£1,970	£2,340	£1,877	£2,133	£1,776	£2,368	£2,159
2020 (£)	£1,970	£2,340	£1,877	£2,133	£1,776	£2,368	£2,159
2025 (£)	£1,988	£2,361	£1,894	£2,152	£1,792	£2,389	£2,178
Change 2020-2025 (£)	£18	£21	£17	£19	£16	£21	£19

Notes

2019 Expenditure rates are sourced from Table 1 of Appendix E of the Nexus Retail and Leisure Study November 2019 (already excluding SFT)

Expenditure growth is sourced from Figure 1a of Experian Retail Planner Briefing Note 17 - February 2020

2020	0%
2021	0.50%
2022	0.10%
2023	0.10%
2024	0.10%
2025	0.10%

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 3. Total Convenience Goods Expenditure

Year	**Zones**							
	1	**2**	**3**	**4**	**5**	**6**	**7**	**Total**
2020 (£m)	68.0	20.4	75.1	46.2	38.5	14.8	36.6	299.6
2025 (£m)	69.8	20.9	77.2	47.5	39.5	15.2	37.6	307.7
Overall Growth (%)								2.7%

Notes

1. Total expenditure derived from Tables 1 and 2.

Newport Sub-total	85.8	79.0	90.9	88.1	92.8	52.5	50.8	90.6	91.1	99.8	76.0	96.0	51.8	82.9
Stores Outside Newport	14.2	21.0	9.1	11.9	7.2	47.5	49.2	9.4	8.9	0.2	24.0	4.0	48.2	17.1
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Notes

Market share percentages sourced from Table 3 of Appendix E of the Nexus Newport Retail and Leisure Study November 2019

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 5a. Convenience Goods Turnover by Zone 2020

	Main Food Shopping (£m)							Top-Up Food Shopping (£m)								Market
	1	2	3	4	5	6	7	1	2	3	4	5	6	7	Total	Share (%)
ZONE 1																
Newport City Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.6	0.0	0.9	0.3	0.8	0.0	0.4	3.0	
Iceland, Commercial Street	2.3	0.0	1.8	0.0	0.9	0.0	0.0	0.6	0.1	0.7	0.0	0.7	0.0	0.4	7.3	
M&S Foodhall, Friars Walk Shopping Centre	0.0	0.1	0.0	0.0	0.0	0.0	0.2	1.2	0.0	0.0	0.0	0.5	0.0	0.1	2.0	
Sainsbury's Local, Sovereign Arcade/John Frost Square	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.0	0.0	0.0	1.3	
Tesco Express, Cambrian Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	
Aldi, Barrack Hill	8.2	1.2	3.9	0.5	0.2	0.0	0.0	1.2	0.4	0.9	0.1	0.0	0.1	0.2	17.0	
Bettws Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Mega Food, Commercial Road	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	0.1	
Spar, Bettws Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Out of Centre stores																
Lidl, Usk Way	0.0	0.5	0.6	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.6	
Sainsbury's, Albany Street	10.4	5.5	4.6	3.9	0.8	0.6	1.5	3.8	0.6	2.1	0.5	0.2	0.0	0.4	34.9	
Tesco Express, Clytha Park Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	1.2	
Spar, Stow Hill Service Station	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	0.1	
Tesco Express, Malpas Road	0.0	0.0	0.0	0.0	0.2	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	1.6	
M&S (BP), Malpas Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Zone 1 Sub-total	21.3	7.3	11.3	4.3	2.6	0.6	1.7	11.3	1.1	5.0	1.0	2.6	0.1	1.4	71.6	23.91%
ZONE 2																
Caerleon District Centre	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	1.0	
Sainsbury's Local, Goldcroft Common, Caerleon	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.2	0.0	0.5	0.0	0.0	3.6	
Spar, Station Road, Caerleon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4	
Out of Centre stores																
Premier, Roman Way, Caerleon	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	0.0	0.2	
Spar, Boxer Service Station	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	0.0	0.2	
Zone 2 Sub-total	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.2	0.0	0.5	0.0	0.0	5.4	1.80%
ZONE 3																
Spar, Caerleon Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.1	0.0	0.0	0.0	0.0	1.3	
Spar, Chepstow Road	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	0.1	
Supermarket ABC, Chepstow Road	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	
Iceland, Clarence Place	0.7	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	0.9	
Costcutter, Ringland Shopping Centre	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	
Out of Centre stores																
Tesco Express, Caerleon Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	1.9	0.0	0.0	0.0	0.1	2.8	
One Stop, Chepstow Road	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	
One Stop, Caerleon Road	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	
Tesco Express (Esso), Caerleon Road	0.0	0.0	1.7	0.2	0.0	0.0	0.0	0.0	0.1	0.9	0.3	0.0	0.0	0.0	3.1	
Other Zone 3 stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	1.2	0.0	0.0	0.3	3.3	
Zone 3 Sub-total	0.7	0.0	1.7	0.2	0.0	0.0	0.0	0.8	0.2	7.1	1.6	0.0	0.0	0.4	12.6	4.20%
ZONE 4																
Iceland, Newport Retail Park	0.6	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	1.2	0.2	0.0	0.0	0.0	2.2	
M&S, Newport Retail Park	0.3	0.1	0.0	0.2	0.0	0.0	0.0	0.8	0.0	0.0	0.7	0.1	0.0	0.5	2.8	
Tesco Extra, Spytty Road	1.6	1.5	13.2	10.3	0.4	0.0	0.2	0.0	0.1	4.0	1.6	0.0	0.0	0.0	32.9	
Out of Centre stores																
Aldi, Spytty Road	2.4	0.0	3.6	3.9	0.4	0.0	0.2	0.0	0.0	1.4	0.7	0.0	0.0	0.0	12.6	
Co-op, Cromwell Road, Somerton	0.0	0.0	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.9	0.7	0.0	0.0	0.0	2.1	
Langstone Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	
Morrisons, Orb Drive	0.4	0.2	2.4	6.4	0.2	0.0	0.5	0.0	0.0	1.4	1.8	0.0	0.1	0.6	14.1	
Spar, Hillcroft Garage, Chepstow Road, Langstone	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.5	
Other Zone 4 stores	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	0.9	
Zone 4 Sub-total	5.4	1.9	19.5	21.5	1.0	0.0	0.8	0.8	0.1	8.9	7.6	0.1	0.1	1.0	68.7	22.95%
ZONE 5																
Asda, Lower Dock Street, Pillgwenlly	5.8	0.5	8.2	1.6	2.8	0.2	0.9	0.9	0.1	0.0	0.3	1.7	0.0	0.0	23.0	
Out of Centre stores																
Asda, Pencarn Way, Duffryn	2.0	0.9	5.8	0.0	7.2	3.4	1.5	1.2	0.0	0.0	0.0	2.4	1.4	0.1	25.8	
Duffryn Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	
Lidl, West Retail Park, Docks Way, Mendalgief	0.0	0.1	0.0	0.2	1.4	0.3	0.0	0.0	0.0	0.9	0.0	0.7	0.0	0.0	3.6	
Spar, Cardiff Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6	
Tesco Extra, Harlech Retail Park, Cardiff Road	4.1	0.0	1.0	0.0	9.7	0.7	0.7	2.2	0.0	0.2	0.0	1.2	0.2	0.2	20.4	
Other Zone 5	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.4	
Zone 5 Sub-total	11.9	1.5	15.0	1.8	21.4	4.6	3.2	4.2	0.1	1.1	0.3	7.0	1.6	0.3	74.0	24.71%
ZONE 6																
Out of Centre stores																
Marshfield 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	0.3	0.0	0.3	
Other Zone 6 stores	0.0	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	
Zone 6 Sub-total	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.14%
ZONE 7																
Bassaleg 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	0.2	0.2	
Spar, Bassaleg Road	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	0.3	
High Cross 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	0.3	0.3	
Out of Centre stores																
Rogerstone Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.9	
Morrisons, Azalea Road, Rogerstone	1.7	0.0	0.0	0.7	0.0	0.2	7.4	0.0	0.0	0.0	0.0	0.0	0.0	2.6	12.5	
Tesco Express, Cefn Road, Rogerstone	0.0	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	1.2	
Co-op, High Cross Road, Rogerstone	0.0	0.0	0.3	0.0	0.0	0.0	0.0	1.3	0.0	0.2	0.0	0.0	0.0	1.0	2.9	
Other Zone 7 stores	0.0	0.0	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	
Zone 7 Sub-total	1.7	0.0	0.3	0.7	0.0	0.2	7.4	1.3	0.0	0.2	0.0	0.9	0.0	6.0	18.6	6.22%
Newport Sub-total	40.8	11.3	47.8	28.5	25.0	5.4	13.0	18.5	5.6	22.5	10.5	11.1	2.3	9.1	251.4	83.92%
Stores Outside Newport	6.8	3.0	4.8	3.9	1.9	4.9	12.6	1.9	0.5	0.0	3.3	0.5	2.1	1.9	48.2	16.08%
Total	47.6	14.2	52.6	32.4	26.9	10.4	25.6	20.4	6.1	22.5	13.9	11.5	4.4	11.0	299.6	100.00%

Notes

1. Turnover of each retail destination calculated using market shares from Table 4 and total expenditure from Table 3.
2. Main Food / Top-Up Weighting ratio is 70:30

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 5b. Convenience Goods Turnover and Market Share by Zone Summary 2020

	£m							Total	%						
	1	2	3	4	5	6	7		**1**	**2**	**3**	**4**	**5**	**6**	**7**
ZONE 1															
Newport City Centre	0.6	0.0	0.9	0.3	0.9	0.0	0.4	3.0	0.8%	0.0%	1.1%	0.6%	2.4%	0.0%	1.0%
Iceland, Commercial Street	2.9	0.1	2.4	0.0	1.6	0.0	0.4	7.3	4.2%	0.3%	3.3%	0.0%	4.1%	0.0%	1.0%
M&S Foodhall, Friars Walk Shopping Centre	1.2	0.1	0.0	0.0	0.5	0.0	0.2	2.0	1.7%	0.6%	0.0%	0.0%	1.3%	0.0%	0.7%
Sainsbury's Local, Sovereign Arcade/John Frost Square	0.3	0.0	0.8	0.1	0.0	0.0	0.0	1.3	0.5%	0.0%	1.1%	0.3%	0.0%	0.0%	0.0%
Tesco Express, Cambrian Road	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Barrack Hill	9.5	1.6	4.8	0.6	0.2	0.1	0.2	17.0	13.9%	7.7%	6.5%	1.3%	0.5%	1.0%	0.5%
Bettws Local Centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mega Food, Commercial Road	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
Spar, Bettws Shopping Centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre stores	0.0	0.0	0.0	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, Usk Way	0.0	0.5	0.6	0.0	0.5	0.0	0.0	1.6	0.0%	2.2%	0.8%	0.0%	1.4%	0.0%	0.0%
Sainsbury's, Albany Street	14.2	6.2	6.7	4.3	1.0	0.6	1.9	34.9	20.9%	30.3%	8.9%	9.3%	2.7%	4.3%	5.3%
Tesco Express, Clytha Park Road	1.2	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Stow Hill Service Station	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Tesco Express, Malpas Road	1.4	0.0	0.0	0.0	0.2	0.0	0.0	1.6	2.1%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
M&S (BP), Malpas Road	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 Sub-total	32.6	8.4	16.3	5.3	5.2	0.8	3.1	71.6	47.9%	41.1%	21.7%	11.5%	13.5%	5.3%	8.5%
ZONE 2															
Caerleon District Centre	0.0	1.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, Goldcroft Common, Caerleon	0.0	2.8	0.2	0.0	0.5	0.0	0.0	3.6	0.0%	13.9%	0.3%	0.0%	1.3%	0.0%	0.0%
Spar, Station Road, Caerleon	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre stores															
Premier, Roman Way, Caerleon	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, Boxer Service Station	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 Sub-total	0.0	4.7	0.2	0.0	0.5	0.0	0.0	5.4	0.0%	22.9%	0.3%	0.0%	1.3%	0.0%	0.0%
ZONE 3															
Spar, Caerleon Road	0.0	0.1	1.1	0.0	0.0	0.0	0.0	1.3	0.0%	0.7%	1.5%	0.0%	0.0%	0.0%	0.0%
Spar, Chepstow Road	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Supermarket ABC, Chepstow Road	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Iceland, Clarence Place	0.7	0.0	0.2	0.0	0.0	0.0	0.0	0.9	1.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Costcutter, Ringland Shopping Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Out of Centre stores															
Tesco Express, Caerleon Road	0.8	0.0	1.9	0.0	0.0	0.0	0.1	2.8	1.1%	0.0%	2.6%	0.0%	0.0%	0.0%	0.2%
One Stop, Chepstow Road	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
One Stop, Caerleon Road	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.5	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
Tesco Express (Esso), Caerleon Road	0.0	0.1	2.5	0.5	0.0	0.0	0.0	3.1	0.0%	0.3%	3.4%	1.1%	0.0%	0.0%	0.0%
Other Zone 3 stores	0.0	0.0	1.8	1.2	0.0	0.0	0.3	3.3	0.0%	0.0%	2.4%	2.5%	0.0%	0.0%	0.8%
Zone 3 Sub-total	1.4	0.2	8.7	1.8	0.0	0.0	0.4	12.6	2.1%	1.0%	11.6%	3.9%	0.0%	0.0%	1.1%
ZONE 4															
Iceland, Newport Retail Park	0.6	0.0	1.2	0.4	0.0	0.0	0.0	2.2	0.9%	0.0%	1.6%	0.8%	0.0%	0.0%	0.0%
M&S, Newport Retail Park	1.1	0.1	0.0	0.9	0.1	0.0	0.5	2.8	1.7%	0.6%	0.0%	2.1%	0.3%	0.0%	1.3%
Tesco Extra, Spytty Road	1.6	1.6	17.2	11.9	0.4	0.0	0.2	32.9	2.4%	7.9%	22.9%	25.7%	1.0%	0.0%	0.4%
Out of Centre stores															
Aldi, Spytty Road	2.4	0.0	4.9	4.6	0.4	0.0	0.2	12.6	3.6%	0.0%	6.6%	10.0%	1.1%	0.0%	0.4%
Co-op, Cromwell Road, Somerton	0.0	0.0	1.2	0.9	0.0	0.0	0.0	2.1	0.0%	0.0%	1.6%	2.0%	0.0%	0.0%	0.0%
Langstone Village Centre	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%
Morrisons, Orb Drive	0.4	0.2	3.8	8.3	0.2	0.1	1.1	14.1	0.6%	1.2%	5.1%	17.9%	0.5%	0.6%	3.0%
Spar, Hillcroft Garage, Chepstow Road, Langstone	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Other Zone 4 stores	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.9	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Zone 4 Sub-total	6.2	2.0	28.4	29.1	1.1	0.1	1.9	68.7	9.1%	9.6%	37.8%	63.0%	2.8%	0.6%	5.1%
ZONE 5															
Asda, Lower Dock Street, Pillgwenlly	6.6	0.6	8.2	1.9	4.5	0.2	0.9	23.0	9.7%	3.0%	10.9%	4.1%	11.8%	1.5%	2.5%
Out of Centre stores															
Asda, Pencarn Way, Duffryn	3.2	0.9	5.8	0.0	9.6	4.8	1.6	25.8	4.7%	4.3%	7.7%	0.0%	25.0%	32.4%	4.4%
Duffryn Local Centre	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
Lidl, West Retail Park, Docks Way, Mendalgief	0.0	0.1	0.9	0.2	2.1	0.3	0.0	3.6	0.0%	0.6%	1.2%	0.4%	5.6%	2.0%	0.0%
Spar, Cardiff Road	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%
Tesco Extra, Harlech Retail Park, Cardiff Road	6.3	0.0	1.2	0.0	11.0	0.9	0.9	20.4	9.3%	0.0%	1.7%	0.0%	28.5%	6.3%	2.5%
Other Zone 5	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
Zone 5 Sub-total	16.1	1.6	16.1	2.1	28.5	6.2	3.4	74.0	23.6%	7.9%	21.5%	4.6%	74.0%	42.2%	9.4%
ZONE 6															
Out of Centre stores															
Marshfield Local Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Other Zone 6 stores	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Zone 6 Sub-total	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
ZONE 7															
Bassaleg Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Spar, Bassaleg Road	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.3	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
High Cross Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Out of Centre stores															
Rogerstone Village Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.9	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	1.1%
Morrisons, Azalea Road, Rogerstone	1.7	0.0	0.0	0.7	0.0	0.2	10.0	12.5	2.5%	0.0%	0.0%	1.5%	0.0%	1.3%	27.3%
Tesco Express, Cefn Road, Rogerstone	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Co-op, High Cross Road, Rogerstone	1.3	0.0	0.5	0.0	0.0	0.0	1.0	2.9	2.0%	0.0%	0.7%	0.0%	0.0%	0.0%	2.8%
Other Zone 7 stores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Zone 7 Sub-total	3.0	0.0	0.5	0.7	0.9	0.2	13.3	18.6	4.4%	0.0%	0.7%	1.5%	2.3%	1.3%	36.4%
Newport Sub-total	59.3	16.8	70.3	39.1	36.1	7.7	22.1	251.4	87.2%	82.6%	93.6%	84.5%	93.8%	52.3%	60.4%
Stores Outside Newport	8.7	3.5	4.8	7.2	2.4	7.1	14.5	48.2	12.8%	17.4%	6.4%	15.5%	6.2%	47.7%	39.6%
Total	68.0	20.4	75.1	46.2	38.5	14.8	36.6	299.6	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 6. Convenience Goods Turnover By Zone 2025

	Main Food Shopping (£m)							Top-Up Food Shopping (£m)								Market
	1	2	3	4	5	6	7	1	2	3	4	5	6	7	Total	Share (%)
ZONE 1																
Newport City Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.6	0.0	0.9	0.3	0.8	0.0	0.4	3.1	
Iceland, Commercial Street	2.3	0.0	1.8	0.0	0.9	0.0	0.0	0.6	0.1	0.7	0.0	0.7	0.0	0.4	7.5	
M&S Foodhall, Friars Walk Shopping Centre	0.0	0.1	0.0	0.0	0.0	0.0	0.2	1.2	0.0	0.0	0.0	0.5	0.0	0.1	2.1	
Sainsbury's Local, Sovereign Arcade/John Frost Square	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.0	0.0	0.0	1.3	
Tesco Express, Cambrian Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	
Aldi, Barrack Hill	8.5	1.2	4.1	0.5	0.2	0.0	0.0	1.3	0.4	0.9	0.1	0.0	0.2	0.2	17.5	
Bettws Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Mega Food, Commercial Road	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	0.1	
Spar, Bettws Shopping Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Out of Centre stores																
Lidl, Usk Way	0.0	0.5	0.6	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.7	
Sainsbury's, Albany Street	10.7	5.7	4.7	4.0	0.8	0.6	1.6	3.9	0.6	2.2	0.5	0.2	0.0	0.4	35.9	
Tesco Express, Clytha Park Road	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	0.0	1.3	
Spar, Stow Hill Service Station	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	0.1	
Tesco Express, Malpas Road	0.0	0.0	0.0	0.0	0.2	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	1.6	
M&S (BP), Malpas Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	
Zone 1 Sub-total	21.9	7.5	11.6	4.4	2.7	0.6	1.7	11.6	1.1	5.1	1.0	2.6	0.2	1.5	73.6	23.91%
ZONE 2																
Caerleon District Centre	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	1.0	
Sainsbury's Local, Goldcroft Common, Caerleon	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.3	0.0	0.5	0.0	0.0	3.6	
Spar, Station Road, Caerleon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4	
Out of Centre stores																
Premier, Roman Way, Caerleon	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	0.0	0.2	
Spar, Boxer Service Station	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	0.0	0.2	
Zone 2 Sub-total	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.3	0.0	0.5	0.0	0.0	5.5	1.80%
ZONE 3																
Spar, Caerleon Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.2	0.0	0.0	0.0	0.0	1.3	
Spar, Chepstow Road	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	0.1	
Supermarket ABC, Chepstow Road	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	
Iceland, Clarence Place	0.7	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	0.9	
Costcutter, Ringland Shopping Centre	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	
Out of Centre stores																
Tesco Express, Caerleon Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	2.0	0.0	0.0	0.0	0.1	2.9	
One Stop, Chepstow Road	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	0.3	
One Stop, Caerleon Road	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	
Tesco Express (Esso), Caerleon Road	0.0	0.0	1.7	0.2	0.0	0.0	0.0	0.0	0.1	0.9	0.3	0.0	0.0	0.0	3.2	
Other Zone 3 stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	1.2	0.0	0.0	0.3	3.4	
Zone 3 Sub-total	0.7	0.0	1.7	0.2	0.0	0.0	0.0	0.8	0.2	7.2	1.6	0.0	0.0	0.4	12.9	4.20%
ZONE 4																
Iceland, Newport Retail Park	0.6	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	1.2	0.2	0.0	0.0	0.0	2.3	
M&S, Newport Retail Park	0.3	0.1	0.0	0.2	0.0	0.0	0.0	0.8	0.0	0.0	0.7	0.1	0.0	0.5	2.9	
Tesco Extra, Spytty Road	1.7	1.6	13.6	10.6	0.4	0.0	0.2	0.0	0.1	4.1	1.6	0.0	0.0	0.0	33.8	
Out of Centre stores																
Aldi, Spytty Road	2.5	0.0	3.7	4.0	0.4	0.0	0.2	0.0	0.0	1.4	0.7	0.0	0.0	0.0	12.9	
Co-op, Cromwell Road, Somerton	0.0	0.0	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.9	0.8	0.0	0.0	0.0	2.2	
Langstone Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	
Morrisons, Orb Drive	0.4	0.2	2.5	6.6	0.2	0.0	0.5	0.0	0.0	1.4	1.9	0.0	0.1	0.6	14.5	
Spar, Hillcroft Garage, Chepstow Road, Langstone	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.5	
Other Zone 4 stores	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	0.9	
Zone 4 Sub-total	5.5	1.9	20.0	22.1	1.0	0.0	0.8	0.8	0.1	9.1	7.9	0.1	0.1	1.1	70.6	22.95%
ZONE 5																
Asda, Lower Dock Street, Pillgwenlly	5.9	0.5	8.4	1.7	2.9	0.2	0.9	0.9	0.1	0.0	0.3	1.8	0.0	0.0	23.7	
Out of Centre stores																
Asda, Pencarn Way, Duffryn	2.1	0.9	5.9	0.0	7.4	3.4	1.6	1.2	0.0	0.0	0.0	2.4	1.5	0.1	26.6	
Duffryn Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	
Lidl, West Retail Park, Docks Way, Mendalgief	0.0	0.1	0.0	0.2	1.5	0.3	0.0	0.0	0.0	0.9	0.0	0.7	0.0	0.0	3.7	
Spar, Cardiff Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6	
Tesco Extra, Harlech Retail Park, Cardiff Road	4.2	0.0	1.0	0.0	10.0	0.8	0.7	2.3	0.0	0.3	0.0	1.3	0.2	0.2	20.9	
Other Zone 5	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.5	
Zone 5 Sub-total	12.2	1.5	15.4	1.9	22.0	4.7	3.2	4.3	0.1	1.2	0.3	7.2	1.7	0.3	76.0	24.71%
ZONE 6																
Out of Centre stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Marshfield 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	0.3	0.0	0.3	
Other Zone 6 stores	0.0	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	
Zone 6 Sub-total	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.14%
ZONE 7																
Bassaleg 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	0.2	0.2	
Spar, Bassaleg Road	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	0.0	0.4	
High Cross 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	0.3	0.3	
Out of Centre stores																
Rogerstone Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.9	
Morrisons, Azalea Road, Rogerstone	1.7	0.0	0.0	0.7	0.0	0.2	7.6	0.0	0.0	0.0	0.0	0.0	0.0	2.7	12.9	
Tesco Express, Cefn Road, Rogerstone	0.0	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	1.2	
Co-op, High Cross Road, Rogerstone	0.0	0.0	0.3	0.0	0.0	0.0	0.0	1.4	0.0	0.2	0.0	0.0	0.0	1.1	3.0	
Other Zone 7 stores	0.0	0.0	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	
Zone 7 Sub-total	1.7	0.0	0.3	0.7	0.0	0.2	7.6	1.4	0.0	0.2	0.0	0.9	0.0	6.1	19.1	6.22%
Newport Sub-total	42.0	11.6	49.1	29.3	25.7	5.6	13.4	19.0	5.7	23.1	10.8	11.4	2.4	9.3	258.3	83.92%
Stores Outside Newport	6.9	3.1	4.9	4.0	2.0	5.1	12.9	2.0	0.6	0.0	3.4	0.5	2.2	1.9	49.5	16.08%
Total	48.9	14.6	54.0	33.3	27.7	10.6	26.3	21.0	6.3	23.1	14.3	11.9	4.6	11.3	307.7	100.00%

Notes
1. Turnover of each retail destination calculated using market shares from Table 4 and total expenditure from Table 3.
2. Main Food / Top-Up Weighting ratio is 70:30

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 7a: Proposal and Commitment Turnovers

New Destination	Net Floor Areas (sq. m)			Sales Density 2020 (£)		Benchmark Turnover 2020 (£m)		Benchmark Turnover 2025 (£m)	
	Total Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
Proposed Aldi, Mon Bank	1315	1052	263	12,078	10,352	12.71	2.72	12.96	2.98
Commitments									
Aldi, Crindau (new store uplift)	665	492	173	12,078	10,352	5.94	1.79	6.06	1.96
Lidl, Cardiff Road (new store uplift)	555	444	111	10,090		4.48	N/A	4.57	N/A
Iceland The Food Warehouse (Commitment)	850	680	170	7,426		5.05	N/A	5.15	N/A

Notes

1) Aldi Sales Density Figures taken from Mintel 2020 (2019 data) and grown by 0.4% to give a 2020 estimate

2) Aldi Crindau commitment based on the uplift in floorspace following the closure of Aldi Barrack Hill. Lidl Cardiff Road commitment based on the uplift in floorspace following closure of Lidl Docks Way

3) Proposal convenience/comparison sales area based on an 80%/20% split.

4) Floorspace efficiency at +0.4% per annum for convenience goods and +1.8% per annum for comparison goods applied between 2020 and 2025

Table 7b: Proposal Trade Draw Pattern

New Destination		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**Total**
Proposed Aldi, Mon Bank									
2020 Convenience Goods Turnover (£m)	12.96								
Trade Draw									
%		7.0%	3.0%	22.0%	1.0%	55.0%	10.0%	2.0%	100.0%
£m		0.91	0.39	2.85	0.13	7.13	1.30	0.26	12.96

Notes.

Trade draw for Aldi proposal based on current trade draw for Lidl, West Retail Park.

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 8. 2020 Benchmark Turnover of Convenience Goods Floorspace in Catchment

	Zone	Total Survey Derived T/O (£m)	Convenience Net Sales Area (sq.m)	Company Ave Sales Density 2020 (£/sq.m)	Benchmark Turnover (£m)
ZONE 1					
Newport City Centre	1	3.00 -			5.40
Iceland, Commercial Street	1	7.33	1,144	6,690	7.65
M&S Foodhall, Friars Walk Shopping Centre	1	2.02	683	10,217	6.98
Sainsbury's Local, Sovereign Arcade/John Frost Square	1	1.29	223	11,401	2.54
Tesco Express, Cambrian Road	1	0.20	252	13,455	3.39
Aldi, Barrack Hill	1	17.01	679	10,559	7.17
Bettws Local Centre	1	0.37 -			0.30
Mega Food, Commercial Road	1	0.14 -			0.10
Spar, Bettws Shopping Centre	1	0.37	553	7,856	4.34
Out of Centre stores					
Lidl, Usk Way	1	1.61	795	9,853	7.83
Sainsbury's, Albany Street	1	34.94	4,946	11,401	56.39
Tesco Express, Clytha Park Road	1	1.24	208	13,455	2.80
Spar, Stow Hill Service Station	1	0.12	251	7,856	1.97
Tesco Express, Malpas Road	1	1.60	224	13,455	3.01
M&S (BP), Malpas Road	1	0.39	91	10,217	0.93
Zone 1 Sub-total	1	71.62	10,049		105.02
ZONE 2					
Caerleon District Centre	2	1.02 -			0.80
Sainsbury's Local, Goldcroft Common, Caerleon	2	3.55	206	11,401	2.35
Spar, Station Road, Caerleon	2	0.41	87	7,856	0.68
Out of Centre stores					
Premier, Roman Way, Caerleon	2	0.23	113	6,749	0.76
Spar, Boxer Service Station	2	0.20	254	7,856	2.00
Zone 2 Sub-total	2	5.40	660		5.79
ZONE 3					
Spar, Caerleon Road	3	1.27	248	7,856	1.95
Spar, Chepstow Road	3	0.14	157	7,856	1.23
Supermarket ABC, Chepstow Road	3	0.20 -			0.20
Iceland, Clarence Place	3	0.87	314	6,690	2.10
Costcutter, Ringland Shopping Centre	3	0.20	493	4,614	2.27
Out of Centre stores					
Tesco Express, Caerleon Road	3	2.78	219	13,455	2.95
One Stop, Chepstow Road	3	0.25	228	8,139	1.86
One Stop, Caerleon Road	3	0.50	236	8,139	1.92
Tesco Express (Esso), Caerleon Road	3	3.09	270	13,455	3.63
Other Zone 3 stores	3	3.28 -			2.70
Zone 3 Sub-total	3	12.57	2,165		17.91
ZONE 4					
Iceland, Newport Retail Park	4	2.20	326	6,690	2.18
M&S, Newport Retail Park	4	2.79	799	10,217	8.16
Tesco Extra, Spytty Road	4	32.86	5,477	13,455	73.69
Out of Centre stores					
Aldi, Spytty Road	4	12.56	841	10,559	8.88
Co-op, Cromwell Road, Somerton	4	2.12	347	10,556	3.66
Langstone Village Centre	4	0.72 -			0.60
Morrisons, Orb Drive	4	14.07	2,286	12,342	28.21
Spar, Hillcroft Garage, Chepstow Road, Langstone	4	0.53	158	7,856	1.24
Other Zone 4 stores	4	0.89 -			1.20
Zone 4 Sub-total	4	68.74	10,234		126.03
ZONE 5					
Asda, Lower Dock Street, Pillgwenlly	5	23.03	4,289	13,321	57.13
Out of Centre stores					
Asda, Pencarn Way, Duffryn	5	25.84	3,310	13,321	44.09
Duffryn Local Centre	5	0.14 -			0.10
Lidl, West Retail Park, Docks Way, Mendalgief	5	3.62	795	9,853	7.83
Spar, Cardiff Road	5	0.60	154	7,856	1.21
Tesco Extra, Harlech Retail Park, Cardiff Road	5	20.35	4,475	13,455	60.21
Other Zone 5	5	0.44 -			0.40
Zone 5 Sub-total	5	74.02	13,023		170.48
ZONE 6					
Out of Centre stores					
Marshfield Local Centre	6	0.26 -			0.20
Other Zone 6 stores	6	0.17 -			0.10
Zone 6 Sub-total	6	0.43	0		0.30
ZONE 7					
Bassaleg Local Centre	7	0.18 -			0.10
Spar, Bassaleg Road	7	0.35	155	7,856	1.22
High Cross Local Centre	7	0.27 -			0.20
Out of Centre stores					
Rogerstone Village Centre	7	0.91 -			0.30
Morrisons, Azalea Road, Rogerstone	7	12.55	2,726	12,342	33.64
Tesco Express, Cefn Road, Rogerstone	7	1.21	186	13,455	2.50
Co-op, High Cross Road, Rogerstone	7	2.90	352	10,556	3.72
Other Zone 7 stores	7	0.26 -			0.20
Zone 7 Sub-total	7	18.63	3,419		41.08
Newport Sub-total		251.40	39,550		
Total		299.56			466.31

Notes
Net convenience sales areas sourced from Table 5 of Appendix E of the Newport Retail and Leisure Study 2019
Average sales densities sourced from Table 5 of Appendix E of the Newport Retail and Leisure Study 2019, and grown to 2020 figures using a growth rate of 0.4% per annum.

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Table 9. Convenience Goods Expenditure Capacity

	2020	2025
Available Expenditure in in Catchment (Zones 1 to 7) (£m)	299.56	307.74
Turnover from stores in the Catchment (£m)	251.40	258.27
Market Share (%)	83.92	83.92
Expenditure Inflow (£m)	48.16	49.47
Total Turnover Potential of Conv Goods Facilities (£m)	299.56	307.74
Benchmark Turnover of Conv Goods Facilities (£m)	466.31	475.72
Residual Expenditure (Capacity) (£m)	-166.75	-167.97
Turnover of Commitments (Aldi Crindau, Lidl Cardiff Road and Iceland Food Warehouse)	-15.47	-15.78
Turnover of Application Proposal (£m)	-12.71	-12.96
Residual Expenditure Post Commitment & Proposals (£m)	-194.93	-196.72

Notes

1) Available Expenditure (Zones 1 - 7) taken from Table 3 of this Study
2) 'Turnover from Study Area' is the total survey derived turnover for each destination within Zones 1 - 7
3) 'Market Share' is 'Turnover from Study Area' / 'Available Expenditure Zones 1 - 7'
4) 'Expenditure Inflow' is the total estimated expenditure from outside of Newport being spent at Zones 1 - 7 destinations
5) 'Total Turnover Potential of Convenience Goods Facilities' is 'Turnover from Study Area' & 'Expenditure Inflow'
6) 'Benchmark Turnover of Convenience Goods Facilities' taken from Table 8 of this Study
7) 'Residual Expenditure (Capacity)' is 'Total Turnover Potential of Convenience Goods Facilities' less 'Benchmark Turnover of Convenience Goods Facilities'

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Table 10. Existing Commitments Convenience Goods Impact 2025

	Pre-Impact T/O	Diversion to Iceland		Impact	Post-Impact T/O	Diversion to Lidl Proposal (uplift only)		Impact	Post-Impact T/O	Diversion to Aldi Crindau (uplift only)		Impact	Post-Impact T/O	Cumulative Impact
	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)
ZONE 1														
Newport City Centre	3.1	0.6	0.03	-1.0%	3.0	0.0	0.00	0.0%	3.0	0.0	0.00	0.0%	3.0	-1.0%
Iceland, Commercial Street	7.5	2.2	0.11	-1.5%	7.4	0.0	0.00	0.0%	7.4	0.0	0.00	0.0%	7.4	-1.5%
M&S Foodhall, Friars Walk Shopping Centre	2.1	0.6	0.03	-1.5%	2.0	0.0	0.00	0.0%	2.0	0.0	0.00	0.0%	2.0	-1.5%
Sainsbury's Local, Sovereign Arcade/John Frost Square	1.3	1.0	0.05	-3.9%	1.3	0.0	0.00	0.0%	1.3	0.0	0.00	0.0%	1.3	-3.9%
Tesco Express, Cambrian Road	0.2	1.0	0.05	-24.6%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	-24.6%
Aldi, Barrack Hill (3)	17.5	0.0	0.00	0.0%	17.5	7.0	0.32	-1.8%	17.2	-	-	-	-	-
Bettws Local Centre	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
Mega Food, Commercial Road	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0%
Spar, Bettws Shopping Centre	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
Out of Centre stores														
Lidl, Usk Way	1.7	3.0	0.15	-9.4%	1.5	5.0	0.23	-15.3%	1.3	5.0	0.30	-23.9%	1.0	-41.6%
Sainsbury's, Albany Street	35.9	2.0	0.10	-0.3%	35.8	13.0	0.59	-1.7%	35.2	50.0	3.03	-8.6%	32.2	-10.4%
Aldi, Albany Street (3)	-	-	-	-	-	-	-	-	-	-	-	-	23.2	-
Tesco Express, Clytha Park Road	1.3	0.0	0.00	0.0%	1.3	0.0	0.00	0.0%	1.3	0.0	0.00	0.0%	1.3	0.0%
Spar, Stow Hill Service Station	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0%
Tesco Express, Malpas Road	1.6	0.0	0.00	0.0%	1.6	0.0	0.00	0.0%	1.6	0.0	0.00	0.0%	1.6	0.0%
M&S (BP), Malpas Road	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
Zone 1 Sub-total	73.6	10.4	0.54	-0.7%	73.0	25.0	1.14	-1.6%	71.9	55.0	3.33	-4.6%	74.6	1.4%
ZONE 2														
Caerleon District Centre	1.0	0.0	0.00	0.0%	1.0	0.0	0.00	0.0%	1.0	0.0	0.00	0.0%	1.0	0.0%
Sainsbury's Local, Goldcroft Common, Caerleon	3.6	0.0	0.00	0.0%	3.6	0.0	0.00	0.0%	3.6	1.0	0.06	-1.7%	3.6	-1.7%
Spar, Station Road, Caerleon	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
			0.00											
Out of Centre stores			0.00											
Premier, Roman Way, Caerleon	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Spar, Boxer Service Station	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Zone 2 Sub-total	5.5	0.0	0.00	0.0%	5.5	0.0	0.00	0.0%	5.5	1.0	0.06	-1.1%	5.5	-1.1%
ZONE 3														
Spar, Caerleon Road	1.3	0.0	0.00	0.0%	1.3	0.0	0.00	0.0%	1.3	0.0	0.00	0.0%	1.3	0.0%
Spar, Chepstow Road	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0%
Supermarket ABC, Chepstow Road	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Iceland, Clarence Place	0.9	1.0	0.05	-5.8%	0.8	0.0	0.00	0.0%	0.8	0.0	0.00	0.0%	0.8	-5.8%
Costcutter, Ringland Shopping Centre	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Out of Centre stores														
Tesco Express, Caerleon Road	2.9	0.0	0.00	0.0%	2.9	0.0	0.00	0.0%	2.9	0.0	0.00	0.0%	2.9	0.0%
One Stop, Chepstow Road	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0%
One Stop, Caerleon Road	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0%
Tesco Express (Esso), Caerleon Road	3.2	0.0	0.00	0.0%	3.2	0.0	0.00	0.0%	3.2	0.0	0.00	0.0%	3.2	0.0%
Other Zone 3 stores	3.4	0.0	0.00	0.0%	3.4	0.0	0.00	0.0%	3.4	0.0	0.00	0.0%	3.4	0.0%
Zone 3 Sub-total	12.9	1.0	0.05	-0.4%	12.9	0.0	0.00	0.0%	12.9	0.0	0.00	0.0%	12.9	-0.4%
ZONE 4														
Iceland, Newport Retail Park	2.3	1.0	0.05	-2.3%	2.2	0.0	0.00	0.0%	2.2	0.0	0.00	0.0%	2.2	-2.3%
M&S, Newport Retail Park	2.9	0.6	0.03	-1.1%	2.8	0.0	0.00	0.0%	2.8	0.0	0.00	0.0%	2.8	-1.1%
Tesco Extra, Spytty Road	33.8	5.0	0.26	-0.8%	33.5	3.0	0.14	-0.4%	33.4	8.0	0.48	-1.5%	32.9	-2.6%
Out of Centre stores														
Aldi, Spytty Road	12.9	3.5	0.18	-1.4%	12.7	2.0	0.09	-0.7%	12.6	12.0	0.73	-5.8%	11.9	-7.7%
Co-op, Cromwell Road, Somerton	2.2	0.0	0.00	0.0%	2.2	0.0	0.00	0.0%	2.2	0.0	0.00	0.0%	2.2	0.0%
Langstone Village Centre	0.7	0.0	0.00	0.0%	0.7	0.0	0.00	0.0%	0.7	0.0	0.00	0.0%	0.7	0.0%
Morrisons, Orb Drive	14.5	4.0	0.21	-1.4%	14.2	7.0	0.32	-2.2%	13.9	4.0	0.24	-1.7%	13.7	-5.3%
Spar, Hillcroft Garage, Chepstow Road, Langstone	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0%
Other Zone 4 stores	0.9	0.0	0.00	0.0%	0.9	0.0	0.00	0.0%	0.9	0.0	0.00	0.0%	0.9	0.0%
Zone 4 Sub-total	70.6	14.1	0.73	-1.0%	69.9	12.0	0.55	-0.8%	69.3	24.0	1.45	-2.1%	67.9	-3.9%
ZONE 5														
Asda, Lower Dock Street, Pillgwenlly	23.7	13.5	0.70	-2.9%	23.0	5.0	0.23	-1.0%	22.7	5.0	0.30	-1.3%	22.4	-5.2%
Out of Centre stores														
Asda, Pencarn Way, Duffryn	26.6	5.0	0.26	-1.0%	26.3	17.0	0.78	-3.0%	25.5	3.0	0.18	-0.7%	25.3	-4.6%
Duffryn Local Centre	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0	0.00	0.0%	0.1	0.0%
Lidl, West Retail Park, Docks Way, Mendalgief (4)	3.7	10.0	0.52	-13.8%	3.2	-	-	-	7.8	0.0	0.00	0.0%	7.8	-
Spar, Cardiff Road	0.6	0.0	0.00	0.0%	0.6	0.0	0.00	0.0%	0.6	0.0	0.00	0.0%	0.6	0.0%
Tesco Extra, Harlech Retail Park, Cardiff Road	20.9	45.0	2.32	-11.1%	18.6	27.0	1.23	-6.6%	17.4	2.0	0.12	-0.7%	17.2	-17.6%
Iceland, East Retail Park	-	-	-	-	5.2	5.0	0.23	-4.4%	4.9	1.0	0.06	-1.2%	4.9	-5.6%
Other Zone 5	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0	0.00	0.0%	0.5	0.0%
Zone 5 Sub-total	76.0	73.5	3.79	-5.0%	77.4	54.0	2.47	-3.2%	79.5	11.0	0.67	-0.8%	78.8	3.7%
ZONE 6														
Out of Centre stores														
Marshfield Local Centre	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0%
Other Zone 6 stores	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Zone 6 Sub-total	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
ZONE 7														
Bassaleg Local Centre	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0	0.00	0.0%	0.2	0.0%
Spar, Bassaleg Road	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0	0.00	0.0%	0.4	0.0%
High Cross Local Centre	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0%
Out of Centre stores														
Rogerstone Village Centre	0.9	0.0	0.00	0.0%	0.9	0.0	0.00	0.0%	0.9	0.0	0.00	0.0%	0.9	0.0%
Morrisons, Azalea Road, Rogerstone	12.9	0.0	0.00	0.0%	12.9	4.0	0.18	-1.4%	12.7	0.0	0.00	0.0%	12.7	-1.4%
Tesco Express, Cefn Road, Rogerstone	1.2	0.0	0.00	0.0%	1.2	0.0	0.00	0.0%	1.2	0.0	0.00	0.0%	1.2	0.0%
Co-op, High Cross Road, Rogerstone	3.0	0.0	0.00	0.0%	3.0	0.0	0.00	0.0%	3.0	0.0	0.00	0.0%	3.0	0.0%
Other Zone 7 stores	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0	0.00	0.0%	0.3	0.0%
Zone 7 Sub-total	19.1	0.0	0.00	0.0%	19.1	4.0	0.18	-1.0%	19.0	0.0	0.00	0.0%	19.0	-1.0%
Newport Sub-total	258.3	99.0	5.10	-2.0%	258.3	95.0	4.34	-1.7%	258.5	91.0	5.52	-2.1%	259.1	0.3%
Stores Outside Newport	49.5	1.0	0.05	-0.1%	49.4	5.0	0.23	-0.5%	49.2	9.0	0.55	-1.1%	48.6	-1.7%
Total	307.7	100.0	5.15		307.7	100.0	4.57		307.7	100.0	6.06		307.7	0.0%

Notes

(1) 2025 Turnover of existing destinations derived on a constant market share

(2) Retail commitments' trade diversion from existing destinations is based on relevant application supporting material

(3) Aldi Barrack Hill is to be replaced by Aldi Albany Street by 2025.

(4) Lidl West Retail Park is to be replaced by Lidl Cardiff Road by 2025.

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Table 11. Trade Draw Impact of Proposal 2025

	2025	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Total Trade Draw		Adjusted Trade Diversion
	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%
Aldi Turnover 2025	£12.96	7.0%	£0.91	3.00%	£0.39	22.00%	£2.85	1.00%	£0.13	55.00%	£7.13	10.00%	£1.30	2.00%	£0.26	100.00%	£12.96	-
ZONE 1																		
Newport City Centre	£3.05	0.8%	£0.01	0.0%	£0.00	1.14%	£0.03	0.6%	£0.00	2.44%	£0.17	0.0%	£0.00	1.0%	£0.00	1.7%	£0.22	1.5%
Iceland, Commercial Street	£7.41	4.2%	£0.04	0.3%	£0.00	3.25%	£0.09	0.0%	£0.00	4.13%	£0.29	0.0%	£0.00	1.0%	£0.00	3.3%	£0.43	3.0%
M&S Foodhall, Friars Walk Shopping Centre	£2.05	1.7%	£0.02	0.6%	£0.00	0.00%	£0.00	0.0%	£0.00	1.26%	£0.09	0.0%	£0.00	0.7%	£0.00	0.8%	£0.11	0.0%
Sainsbury's Local, Sovereign Arcade/John Frost Square	£1.27	0.5%	£0.00	0.0%	£0.00	1.09%	£0.03	0.3%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.3%	£0.04	0.0%
Tesco Express, Cambrian Road	£0.16	0.3%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Bettws Local Centre	£0.38	0.5%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Mega Food, Commercial Road	£0.14	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.36%	£0.03	0.0%	£0.00	0.0%	£0.00	0.2%	£0.03	0.0%
Spar, Bettws Shopping Centre	£0.38	0.5%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Out of Centre stores																		
Lidl, Usk Way	£0.96	0.0%	£0.00	2.2%	£0.01	0.84%	£0.02	0.0%	£0.00	1.35%	£0.10	0.0%	£0.00	0.0%	£0.00	1.0%	£0.13	2.0%
Sainsbury's, Albany Street	£32.17	20.9%	£0.19	30.3%	£0.12	8.88%	£0.25	9.3%	£0.01	2.66%	£0.19	4.3%	£0.06	5.3%	£0.01	6.4%	£0.83	7.0%
Aldi, Albany Street	£23.22	13.9%	£0.13	7.7%	£0.03	6.45%	£0.18	1.3%	£0.00	0.49%	£0.03	1.0%	£0.01	0.5%	£0.00	3.0%	£0.39	3.0%
Tesco Express, Clytha Park Road	£1.28	1.8%	£0.02	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.02	0.0%
Spar, Stow Hill Service Station	£0.12	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.30%	£0.02	0.0%	£0.00	0.0%	£0.00	0.2%	£0.02	0.0%
Tesco Express, Malpas Road	£1.64	2.1%	£0.02	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.49%	£0.03	0.0%	£0.00	0.0%	£0.00	0.4%	£0.05	0.0%
M&S (BP), Malpas Road	£0.40	0.6%	£0.01	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.01	0.0%
Zone 1 Sub-total	£74.62	47.9%	£0.43	41.1%	£0.16	21.65%	£0.62	11.5%	£0.01	13.48%	£0.96	5.3%	£0.07	8.5%	£0.02	17.6%	£2.28	16.5%
ZONE 2																		
Caerleon District Centre	£1.05	0.0%	£0.00	5.0%	£0.02	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.2%	£0.02	0.0%
Sainsbury's Local, Goldcroft Common, Caerleon	£3.59	0.0%	£0.00	13.9%	£0.05	0.33%	£0.01	0.0%	£0.00	1.26%	£0.09	0.0%	£0.00	0.0%	£0.00	1.2%	£0.15	0.0%
Spar, Station Road, Caerleon	£0.42	0.0%	£0.00	2.0%	£0.01	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.01	0.0%
	£0.00	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Out of Centre stores	£0.00	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Premier, Roman Way, Caerleon	£0.23	0.0%	£0.00	1.1%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Spar, Boxer Service Station	£0.20	0.0%	£0.00	1.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Zone 2 Sub-total	£5.49	0.0%	£0.00	22.9%	£0.09	0.33%	£0.01	0.0%	£0.00	1.26%	£0.09	0.0%	£0.00	0.0%	£0.00	1.5%	£0.19	0.0%
ZONE 3																		
Spar, Caerleon Road	£1.30	0.0%	£0.00	0.7%	£0.00	1.50%	£0.04	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.4%	£0.05	0.0%
Spar, Chepstow Road	£0.14	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.3%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Supermarket ABC, Chepstow Road	£0.21	0.0%	£0.00	0.0%	£0.00	0.27%	£0.01	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.01	0.0%
Iceland, Clarence Place	£0.84	1.0%	£0.01	0.0%	£0.00	0.27%	£0.01	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.02	0.0%
Costcutter, Ringland Shopping Centre	£0.21	0.0%	£0.00	0.0%	£0.00	0.27%	£0.01	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.01	0.0%
Out of Centre stores																		
Tesco Express, Caerleon Road	£2.85	1.1%	£0.01	0.0%	£0.00	2.55%	£0.07	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.2%	£0.00	0.6%	£0.08	0.0%
One Stop, Chepstow Road	£0.25	0.0%	£0.00	0.0%	£0.00	0.33%	£0.01	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.01	0.0%
One Stop, Caerleon Road	£0.51	0.0%	£0.00	0.0%	£0.00	0.66%	£0.02	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.1%	£0.02	0.0%
Tesco Express (Esso), Caerleon Road	£3.18	0.0%	£0.00	0.3%	£0.00	3.38%	£0.10	1.1%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.8%	£0.10	0.0%
Other Zone 3 stores	£3.36	0.0%	£0.00	0.0%	£0.00	2.40%	£0.07	2.5%	£0.00	0.00%	£0.00	0.0%	£0.00	0.8%	£0.00	0.6%	£0.07	0.0%
Zone 3 Sub-total	£12.86	2.1%	£0.02	1.0%	£0.00	11.63%	£0.33	3.9%	£0.01	0.00%	£0.00	0.0%	£0.00	1.1%	£0.00	2.8%	£0.36	0.0%
ZONE 4																		
Iceland, Newport Retail Park	£2.20	0.9%	£0.01	0.0%	£0.00	1.62%	£0.05	0.8%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.4%	£0.06	1.0%
M&S, Newport Retail Park	£2.83	1.7%	£0.02	0.6%	£0.00	0.00%	£0.00	2.1%	£0.00	0.30%	£0.02	0.0%	£0.00	1.3%	£0.00	0.3%	£0.04	0.0%
Tesco Extra, Spytty Road	£32.88	2.4%	£0.02	7.9%	£0.03	22.94%	£0.65	25.7%	£0.03	0.98%	£0.07	0.0%	£0.00	0.4%	£0.00	6.3%	£0.81	7.5%
Out of Centre stores																		
Aldi, Spytty Road	£11.90	3.6%	£0.03	0.0%	£0.00	6.59%	£0.19	10.0%	£0.01	1.05%	£0.07	0.0%	£0.00	0.4%	£0.00	2.4%	£0.31	4.0%
Co-op, Cromwell Road, Somerton	£2.18	0.0%	£0.00	0.0%	£0.00	1.59%	£0.05	2.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.4%	£0.05	0.0%
Langstone Village Centre	£0.74	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	1.6%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Morrisons, Orb Drive	£13.68	0.6%	£0.01	1.2%	£0.00	5.08%	£0.14	17.9%	£0.02	0.49%	£0.03	0.6%	£0.01	3.0%	£0.01	1.8%	£0.23	2.5%
Spar, Hillcroft Garage, Chepstow Road, Langstone	£0.55	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	1.2%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Other Zone 4 stores	£0.91	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	1.9%	£0.00	0.00%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%
Zone 4 Sub-total	£67.88	9.1%	£0.08	9.6%	£0.04	37.82%	£1.08	63.0%	£0.08	2.82%	£0.20	0.6%	£0.01	5.1%	£0.01	11.6%	£1.50	15.0%
ZONE 5																		
Asda, Lower Dock Street, Pillgwenlly	£22.43	9.7%	£0.09	3.0%	£0.01	10.92%	£0.31	4.1%	£0.01	11.79%	£0.84	1.5%	£0.02	2.5%	£0.01	9.9%	£1.28	10.0%
Out of Centre stores																		
Asda, Pencarn Way, Duffryn	£25.33	4.7%	£0.04	4.3%	£0.02	7.70%	£0.22	0.0%	£0.00	25.01%	£1.78	32.4%	£0.42	4.4%	£0.01	19.2%	£2.49	15.0%
Duffryn Local Centre	£0.14	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.36%	£0.03	0.0%	£0.00	0.0%	£0.00	0.2%	£0.03	0.0%
Lidl, Cardiff Road	£7.77	0.0%	£0.00	0.6%	£0.00	1.17%	£0.03	0.4%	£0.00	5.57%	£0.40	2.0%	£0.03	0.0%	£0.00	3.5%	£0.46	12.5%
Spar, Cardiff Road	£0.62	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	1.56%	£0.11	0.0%	£0.00	0.0%	£0.00	0.9%	£0.11	0.0%
Tesco Extra, Harlech Retail Park, Cardiff Road	£17.23	9.3%	£0.08	0.0%	£0.00	1.66%	£0.05	0.0%	£0.00	28.51%	£2.03	6.3%	£0.08	2.5%	£0.01	17.4%	£2.25	17.5%
Iceland, East Retail Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5.0%
Other Zone 5	£0.45	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	1.15%	£0.08	0.0%	£0.00	0.0%	£0.00	0.6%	£0.08	0.0%
Zone 5 Sub-total	£73.98	23.6%	£0.21	7.9%	£0.03	21.45%	£0.61	4.6%	£0.01	73.95%	£5.27	42.2%	£0.55	9.4%	£0.02	51.7%	£6.71	60.0%
ZONE 6																		
Out of Centre stores																		
Marshfield Local Centre	£0.26	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	1.7%	£0.02	0.0%	£0.00	0.2%	£0.02	0.0%
Other Zone 6 stores	£0.18	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	1.2%	£0.02	0.0%	£0.00	0.1%	£0.02	0.0%
Zone 6 Sub-total	£0.44	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	2.9%	£0.04	0.0%	£0.00	0.3%	£0.04	0.0%
ZONE 7																		
Bassaleg Local Centre	£0.18	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.5%	£0.00	0.0%	£0.00	0.0%
Spar, Bassaleg Road	£0.36	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.90%	£0.06	0.0%	£0.00	0.0%	£0.00	0.5%	£0.06	0.0%
High Cross Local Centre	£0.28	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.8%	£0.00	0.0%	£0.00	0.0%
Out of Centre stores																		
Rogerstone Village Centre	£0.94	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	1.35%	£0.10	0.0%	£0.00	1.1%	£0.00	0.8%	£0.10	0.0%
Morrisons, Azalea Road, Rogerstone	£12.71	2.5%	£0.02	0.0%	£0.00	0.00%	£0.00	1.5%	£0.00	0.00%	£0.00	1.3%	£0.02	27.3%	£0.07	0.9%	£0.11	2.0%
Tesco Express, Cefn Road, Rogerstone	£1.24	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	3.3%	£0.01	0.1%	£0.01	0.0%
Co-op, High Cross Road, Rogerstone	£2.98	2.0%	£0.02	0.0%	£0.00	0.69%	£0.02	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	2.8%	£0.01	0.3%	£0.04	0.0%
Other Zone 7 stores	£0.27	0.0%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.00%	£0.00	0.0%	£0.00	0.7%	£0.00	0.0%	£0.00	0.0%
Zone 7 Sub-total	£18.95	4.4%	£0.04	0.0%	£0.00	0.69%	£0.02	1.5%	£0.00	2.25%	£0.16	1.3%	£0.02	36.4%	£0.09	2.6%	£0.33	2.0%
Newport Sub-total	£259.09	87.2%	£0.79	82.6%	£0.32	93.6%	£2.67	84.5%	£0.11	93.8%	£6.68	52.3%	£0.68	60.4%	£0.16	88.0%	£11.41	93.5%
Stores Outside Newport	£48.65	12.8%	£0.12	17.4%	£0.07	6.4%	£0.18	15.5%	£0.02	6.2%	£0.44	47.7%	£0.62	39.6%	£0.10	12.0%	£1.55	6.5%
Total	**£307.74**	100.0%	£0.91	100.0%	£0.39	100.0%	£2.85	100.0%	£0.13	100.0%	£7.13	100.0%	£1.30	100.0%	£0.26	100.0%	£12.96	100.0%

Notes.
Trade draw and diversion estimates based on current market share, adjusted to reflect commitments and application proposal.

Aldi, Abberley Hall Road, Mon Bank, Newport

Table 12. Sumary Convenience Goods Impact (2025)

	Turnover 2025 (£m)	Trade Diversion (%)	Trade Diversion (£m)	Resultant Turnover (£m)	Impact %
ZONE 1					
Newport City Centre	£3.05	1.5%	£0.19	£2.85	-6.4%
Iceland, Commercial Street	£7.41	3.0%	£0.39	£7.02	-5.2%
M&S Foodhall, Friars Walk Shopping Centre	£2.05	0.0%	£0.00	£2.05	0.0%
Sainsbury's Local, Sovereign Arcade/John Frost Square	£1.27	0.0%	£0.00	£1.27	0.0%
Tesco Express, Cambrian Road	£0.16	0.0%	£0.00	£0.16	0.0%
Bettws Local Centre	£0.38	0.0%	£0.00	£0.38	0.0%
Mega Food, Commercial Road	£0.14	0.0%	£0.00	£0.14	0.0%
Spar, Bettws Shopping Centre	£0.38	0.0%	£0.00	£0.38	0.0%
Out of Centre stores					
Lidl, Usk Way	£0.96	2.0%	£0.26	£0.70	-26.9%
Sainsbury's, Albany Street	£32.17	7.0%	£0.91	£31.26	-2.8%
Aldi, Albany Street	£23.22	3.0%	£0.39	£22.83	-1.7%
Tesco Express, Clytha Park Road	£1.28	0.0%	£0.00	£1.28	0.0%
Spar, Stow Hill Service Station	£0.12	0.0%	£0.00	£0.12	0.0%
Tesco Express, Malpas Road	£1.64	0.0%	£0.00	£1.64	0.0%
M&S (BP), Malpas Road	£0.40	0.0%	£0.00	£0.40	0.0%
Zone 1 Sub-total	£74.62	16.5%	£2.14	£72.48	-2.9%
ZONE 2					
Caerleon District Centre	£1.05	0.0%	£0.00	£1.05	0.0%
Sainsbury's Local, Goldcroft Common, Caerleon	£3.59	0.0%	£0.00	£3.59	0.0%
Spar, Station Road, Caerleon	£0.42	0.0%	£0.00	£0.42	0.0%
Out of Centre stores					
Premier, Roman Way, Caerleon	£0.23	0.0%	£0.00	£0.23	0.0%
Spar, Boxer Service Station	£0.20	0.0%	£0.00	£0.20	0.0%
Zone 2 Sub-total	£5.49	0.0%	£0.00	£5.49	0.0%
ZONE 3					
Spar, Caerleon Road	£1.30	0.0%	£0.00	£1.30	0.0%
Spar, Chepstow Road	£0.14	0.0%	£0.00	£0.14	0.0%
Supermarket ABC, Chepstow Road	£0.21	0.0%	£0.00	£0.21	0.0%
Iceland, Clarence Place	£0.84	0.0%	£0.00	£0.84	0.0%
Costcutter, Ringland Shopping Centre	£0.21	0.0%	£0.00	£0.21	0.0%
Out of Centre stores					
Tesco Express, Caerleon Road	£2.85	0.0%	£0.00	£2.85	0.0%
One Stop, Chepstow Road	£0.25	0.0%	£0.00	£0.25	0.0%
One Stop, Caerleon Road	£0.51	0.0%	£0.00	£0.51	0.0%
Tesco Express (Esso), Caerleon Road	£3.18	0.0%	£0.00	£3.18	0.0%
Other Zone 3 stores	£3.36	0.0%	£0.00	£3.36	0.0%
Zone 3 Sub-total	£12.86	0.0%	£0.00	£12.86	0.0%
ZONE 4					
Iceland, Newport Retail Park	£2.20	1.0%	£0.13	£2.07	-5.9%
M&S, Newport Retail Park	£2.83	0.0%	£0.00	£2.83	0.0%
Tesco Extra, Spytty Road	£32.88	7.5%	£0.97	£31.90	-3.0%
Out of Centre stores					
Aldi, Spytty Road	£11.90	4.0%	£0.52	£11.38	-4.4%
Co-op, Cromwell Road, Somerton	£2.18	0.0%	£0.00	£2.18	0.0%
Langstone Village Centre	£0.74	0.0%	£0.00	£0.74	0.0%
Morrisons, Orb Drive	£13.68	2.5%	£0.32	£13.36	-2.4%
Spar, Hillcroft Garage, Chepstow Road, Langstone	£0.55	0.0%	£0.00	£0.55	0.0%
Other Zone 4 stores	£0.91	0.0%	£0.00	£0.91	0.0%
Zone 4 Sub-total	£67.88	15.0%	£1.94	£65.94	-2.9%
ZONE 5					
Asda, Lower Dock Street, Pillgwenlly	£22.43	10.0%	£1.30	£21.13	-5.8%
Out of Centre stores					
Asda, Pencarn Way, Duffryn	£25.33	15.0%	£1.94	£23.39	-7.7%
Duffryn Local Centre	£0.14	0.0%	£0.00	£0.14	0.0%
Lidl, Cardiff Road	£7.77	12.5%	£1.62	£6.15	-20.8%
Spar, Cardiff Road	£0.62	0.0%	£0.00	£0.62	0.0%
Tesco Extra, Harlech Retail Park, Cardiff Road	£17.23	17.5%	£2.27	£14.96	-13.2%
Iceland, East Retail Park	£4.86	5.0%	£0.65	£4.21	-13.3%
Other Zone 5	£0.45	0.0%	£0.00	£0.45	0.0%
Zone 5 Sub-total	£73.98	60.0%	£7.78	£66.21	-10.5%
ZONE 6					
Out of Centre stores					
Marshfield Local Centre	£0.26	0.0%	£0.00	£0.26	0.0%
Other Zone 6 stores	£0.18	0.0%	£0.00	£0.18	0.0%
Zone 6 Sub-total	£0.44	0.0%	£0.00	£0.44	0.0%
ZONE 7					
Bassaleg Local Centre	£0.18	0.0%	£0.00	£0.18	0.0%
Spar, Bassaleg Road	£0.36	0.0%	£0.00	£0.36	0.0%
High Cross Local Centre	£0.28	0.0%	£0.00	£0.28	0.0%
Out of Centre stores					
Rogerstone Village Centre	£0.94	0.0%	£0.00	£0.94	0.0%
Morrisons, Azalea Road, Rogerstone	£12.71	2.0%	£0.26	£12.45	-2.0%
Tesco Express, Cefn Road, Rogerstone	£1.24	0.0%	£0.00	£1.24	0.0%
Co-op, High Cross Road, Rogerstone	£2.98	0.0%	£0.00	£2.98	0.0%
Other Zone 7 stores	£0.27	0.0%	£0.00	£0.27	0.0%
Zone 7 Sub-total	£18.95	2.0%	£0.26	£18.69	-1.4%
Newport Sub-total	£259.09	93.5%	£12.12	£246.97	-4.7%
Stores Outside Newport	£48.65	6.5%	£0.84	£47.81	-1.7%
Total	£307.74	100.0%	£12.96	£294.78	-4.2%

Notes.
Trade diversion rates derived from Table 11.

Appendix Two – Site Marketing Information

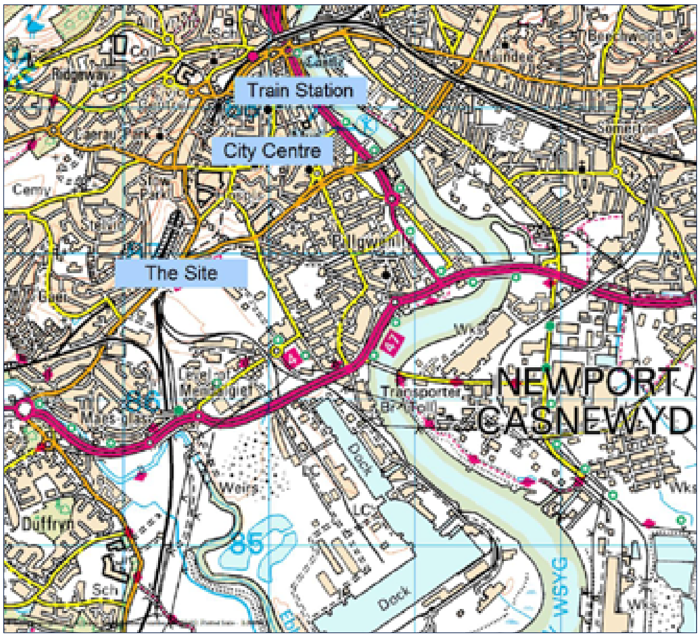
For Sale
Employment Development Land Mon Bank
Cardiff Road, Newport, NP20 2PY

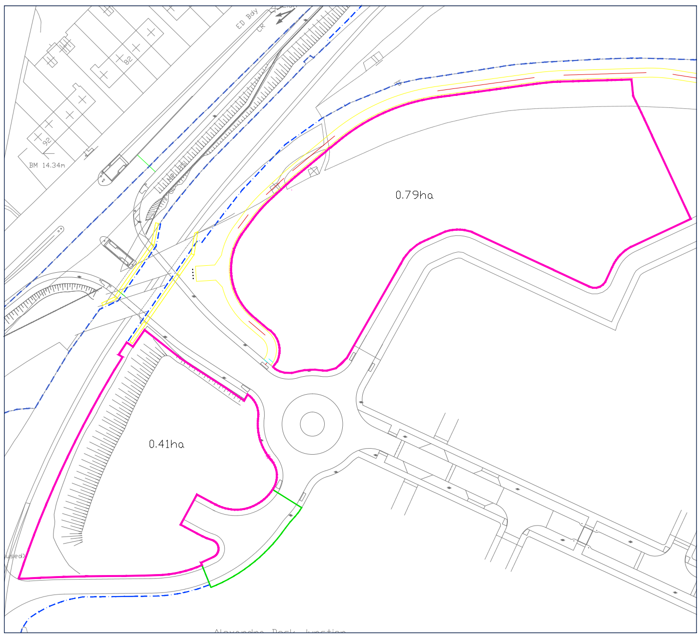
- 1.2 hectares (2.96 acres) of land suitable for B1 Employment Uses
- M4 Junction 28 – 1.4 miles / Newport Town Centre – 1 mile
- Self contained part of a larger mixed use development
- Available as a whole or in two lots of 0.41 hectares (1.01 acres) and 0.79 hectares (1.95 acres)
- Remediated and serviced including high speed fibre optic connectivity

Savills Cardiff
12 Windsor Place
Cardiff CF10 3BY

+44 (0) 2920 368 900

savills.co.uk





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Location

Mon Bank is located just outside Newport City Centre off Cardiff Road, a main arterial road which provides easy access between the city centre 1 mile to the east, and junction 28 of the M4 which is only 1.4 miles to the west.

The site is accessed via a new bridge which has been constructed over the railway line which runs adjacent to the property and sits at the head of the new residential community being created at Mon Bank, and adjoining Harlech Retail Park, home to Tesco Extra, Homebase, Currys PC World and McDonalds.

Newport is the third largest city in Wales with a population of 145,736. It is the cultural capital of the traditional county of Monmouthshire, although an administrative county in its own right which was granted city status in 2002 to mark the Golden Jubilee. The town centre has seen considerable regeneration which continues in the construction of Friars Walk, the new town centre retail and leisure scheme with many household names including Debenhams, Cineworld, Next, Prezzo and Nando's committed to the project.

Communications

Newport has excellent road and rail links making it a popular commuter town. The nearest railway station is in Newport city centre itself, approximately 1 mile from the site.

By Car	
M4 J28	1.4 miles
Town Centre	1 mile
Cardiff	14 miles
Bristol	32 miles
Bridgend	29 miles

By Rail	
Cwmbran	10 mins
Cardiff	15 mins
Bristol Parkway	20 mins
London Paddington	110 mins

Description

The property comprises two broadly level and remediated development plots situated either side of the access road into the Mon Bank development benefiting from good visibility from Cardiff Road.

Highway infrastructure has been provided to create separate access into each plot with utility services, including high speed fibre optic cabling provided to the site boundaries.

The eastern plot has a site area of 0.79 hectares (1.95 acres) and the westerly plot an area of 0.41 hectare (1.01 acres).

Planning

The adjoining residential development site currently under construction by Redrow Homes benefits from planning permission for 575 units. The subject property was omitted from that permission and as such does not benefit from any permission but is allocated for B1 use under policy EM2 in the emerging local development plan.

In accordance with the desire of Newport City Council, the unilateral undertaking relating to the residential development site requires the subject property to be put to a beneficial use falling within Use Class "B1" (Business).

Interested parties are requested to make their own enquiries of Newport City Council at Civic Centre, Godfrey Road, Newport, NP20 4UR.

E: planning@newport.gov.uk

Tel: 01633 656656.

Method of Sale

Offers are invited for the freehold interest in the property by private treaty either as a whole or for each lot on a conditional (subject to planning) basis.

In considering any offer made the seller will have regard to the compatibility of the proposed development and its uses to ensure that they can be carried out without detriment to the residents of the adjoining residential development, and the imposition of covenants and restrictions in order to protect the amenity of adjoining residents will need to be considered and discussed further with potential developers.

Further technical information can be made available to seriously interested parties on request.

Viewings & Further Information

The property can be viewed from the adjoining highway, but please contact Savills, the Sole Selling Agents to arrange an accompanied viewing or to obtain further information

Scott Caldwell
02920 368943
scaldwell@savills.com

Tom Larkin
02920 368962
tlarkin@savills.com

Designed and Produced by Savills Marketing: 020 7499 8644 | September 2014

savills

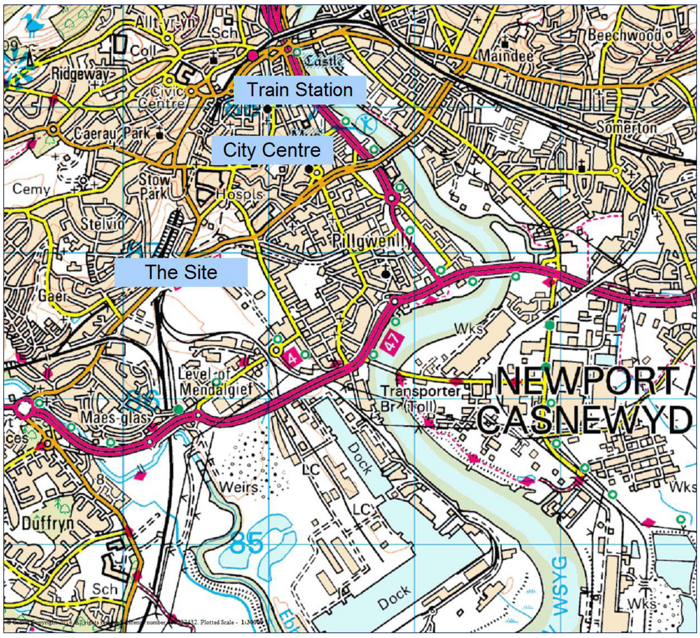
For Sale
Development Land
Mon Bank
Cardiff Road, Newport, NP20 3GD

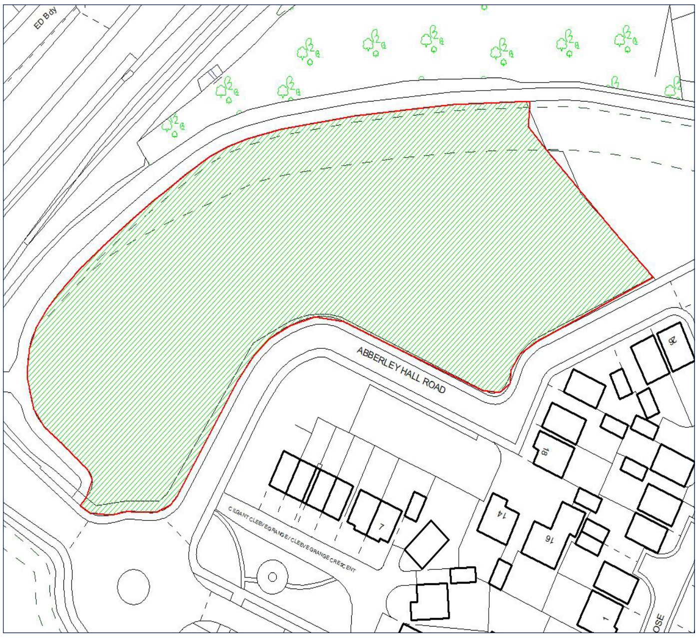
- M4 Junction 28 – 1.4 miles / Newport Town Centre – 1 mile
- Self contained part of a larger residential development
- 0.79 ha (1.95 acre) site
- Remediated and serviced including high speed fibre optic connectivity
- Suitable for a variety of uses (S to P)

Savills Cardiff
12 Windsor Place
Cardiff CF10 3BY

+44 (0) 2920 368 900

savills.co.uk





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NOTE:- Published for the purposes of identification only and although believed to be correct accuracy is not guaranteed.

Location

Mon Bank is located just outside Newport City Centre off Cardiff Road, a main arterial road which provides easy access between the city centre 1 mile to the east, and junction 28 of the M4 which is only 1.4 miles to the west.

The site is accessed via a new bridge which has been constructed over the railway line which runs adjacent to the property and sits at the head of the new residential community being created at Mon Bank, and adjoining Harlech Retail Park, home to Tesco Extra, Homebase, Currys PC World and McDonalds.

Newport is the third largest city in Wales with a population of 145,736. It is the cultural capital of the traditional county of Monmouthshire, although an administrative county in its own right which was granted city status in 2002 to mark the Golden Jubilee. The town centre has seen considerable regeneration which continues in the recent opening of Friars Walk, the new town centre retail and leisure scheme which is home to many household names including Debenhams, Cineworld, Next, Prezzo and Nando's.

Communications

Newport has excellent road and rail links making it a popular commuter town. The nearest railway station is in Newport city centre itself, approximately 1 mile from the site.

By Car	
M4 J28	1.4 miles
Town Centre	1 mile
Cardiff	14 miles
Bristol	32 miles
Bridgend	29 miles

By Rail	
Cwmbran	10 mins
Cardiff	15 mins
Bristol Parkway	20 mins
London Paddington	110 mins

Description

The property comprises a level development site situated on the eastern side of the entrance of the new Mon Bank residential development. The site benefits from good visibility from Cardiff Road.

Highway access has been provided to create access into the plot and utility services, including high speed fibre optic cable is provided to the site boundary.

The plot has a site area of 0.79 ha (1.85 acres).

Planning

The site is considered as 'white land' and is suitable for a variety of uses including residential, retail, care and leisure, subject to receipt of planning permission.

Method of Sale

Offers are invited for the freehold interest in the property by informal tender. Offers on an un-conditional or subject to planning basis will be acceptable.

Offers are to be received by 12 noon on Thursday 12th January 2017. Offers will be accepted either by email to scaldwell@savills.com or post to 12 Windsor Place, Cardiff, CF10 3BY.

Viewings & Further Information

The property can be viewed from the adjoining highway, but please contact Savills, the Sole Selling Agents to arrange an accompanied viewing or to obtain further information.

Scott Caldwell
02920 368943
scaldwell@savills.com

Abbey Bennett
02920 368926
abbey.bennett@savills.com

Designed and Produced by Savills Marketing: 020 7499 8644 | November 2016

Newport Mon Bank (Employment Site)

Report on Marketing Process & Disposal Strategy

Contents

1. Background

The Property forms part of a larger development site that was sold by Network Rail (NR) in April 2012 for a residential led, mixed use development comprising approximately 575 dwellings which is in the process of being developed by Redrow Homes and Llanmoor.

The subject Property was not included within the planning application for proposed development and is classified as unallocated "white land" in the Local Development Plan, although the Unilateral Undertaking (UU) for the development requires the Property to be marketed for B1 development for a period of 2 years.

Savills were initially appointed by Redrow to undertake the marketing of the Property which commenced on 29 September 2014. Subsequently, Network Rail re-acquired the Property as part of (i) negotiations of an overage provision within the original sale contract and (ii) the temporary need for part of the Property to be utilised as a works compound in relation to electrification of the railway line.

On the re-acquisition of the Property, Network Rail appointed Savills as their sales agent and as such, marketing has continued un-interrupted since 29 September 2014.

The planning imposed marketing period has now expired and as such, we have set out below the scope of the marketing exercise undertaken and the level of interest received in order that a managed and focused strategy can be implemented in respect of its future development and disposal.

2. Property Description

The Property comprises two remediated and serviced development plots situated either side of the main (northern) entrance into the Mon Bank residential site and adjoins the railway line to the north west boundaries. The eastern site has a gross site area of approximately 0.79 hectares (1.95 acres) and the western plot 0.41 hectares (1.01 acres). Each plot has been re-graded with independent access to each from the internal development roads which will become adopted highways from where utility services are available.

The western plot (the smaller of the two) currently remains in temporary use by Network Rail as part of the Railway Electrification Project with vacant possession likely to be provided early 2017.

3. Town Planning

A legal agreement requires the Property to be used for B1 uses and a strategy has been agreed with the Local Planning Authority (the Council)) to market the Property for a period of 2 years (from 29 September 2014) to establish the level of interest in the Property for the proposed use.

The Planning Contributions Manager at the Council has confirmed that they will not consider any development proposal that is not straightforward B1 until the agreed marketing period expires at the end of September 2016. After that, if no sustained B1 demand has been identified additional uses will be considered including residential, pub or retail use, albeit a proposed retail use would only be considered acceptable if justified based upon sequential testing.

4. Marketing

The marketing strategy was agreed jointly with the Council and included the preparation of a set of marketing particulars which was initially widely distributed to over 700 contacts on our database of developers, agents and property investors via E-campaign. Details of the property were also uploaded onto Savills website and Estates Gazette Property Link and has been continuously listed on both to the current day.

A For Sale board was also erected in a prominent position on the site.

5. Interest Received

In total 22 enquiries were received, categorised as follows:-

PROPOSED USE	NO OF INTERESTED PARTIES
B1 Use	1
Speculative Interest or No Defined Use	9
Pub/Roadside Use	4
Retail Use	3
Residential Use	3
Day Nursery	2

The majority of the speculative interest was from other agents or developers seeking to acquire the Property un-conditionally with the view of obtaining an enhanced planning permission for a future use and will not therefore satisfy the disposal strategy or requirements under the UU.

During the marketing period, there has been a single interest from Mr. Miller, a locally based developer/investor (albeit who now currently resides abroad but continues to have property interests in Newport) interested in developing a speculative B1 scheme, and his interest is only in the small (western) plot of land. Whilst no formal offer has been made, he has indicated verbally a purchase price in the order of £60,000 to £70,000 for this plot on which he envisages developing a small courtyard office scheme of approximately 6,000 sq ft as identified on the sketch plan identified at **Appendix 1**. This price is below the £150,000 per acre (or part thereof) that was agreed as the minimum land vale threshold that should be considered as reasonable.

None of the other uses currently comply with the B1 use restriction as set out in the UU.

A number of the interested parties maintained a strong interest in the Property in the event that planning permission for an alternative use could be achieved on expiry of the 2 year marketing period and “headline” offers were received from the following parties on a subject to planning basis in addition to the interest expressed in the smaller parcel for B1 use referred to above:-

- **Aldi** – Proposal for an A1 food retail scheme on the larger of the two sites (1.95 acres) as per the indicative layout attached at **Appendix 2**.

- **Green King –** Proposal for pub/restaurant (A4 use) on the larger of the two sites (1.95 acres) as per the site feasibility attached at **Appendix 3**.

Subsequently, Green King have also suggested that they may also consider a scheme incorporating a “lodge” (small hotel) which would fall within a C1 use on the smaller parcel of land.

We have also subsequently received a proposal from Mr. Miller for a Live/Work scheme on the larger parcel of land as per the sketch layout at **Appendix 4**.

All offers are subject to further technical, planning and legal due diligence and full board approval.

6. Recommendation

During the Marketing Period, there was only one interested party who was considering a B1 scheme. That interest was only in the smaller parcel of land and was at a value below the threshold land value agreed at the marketing stage.

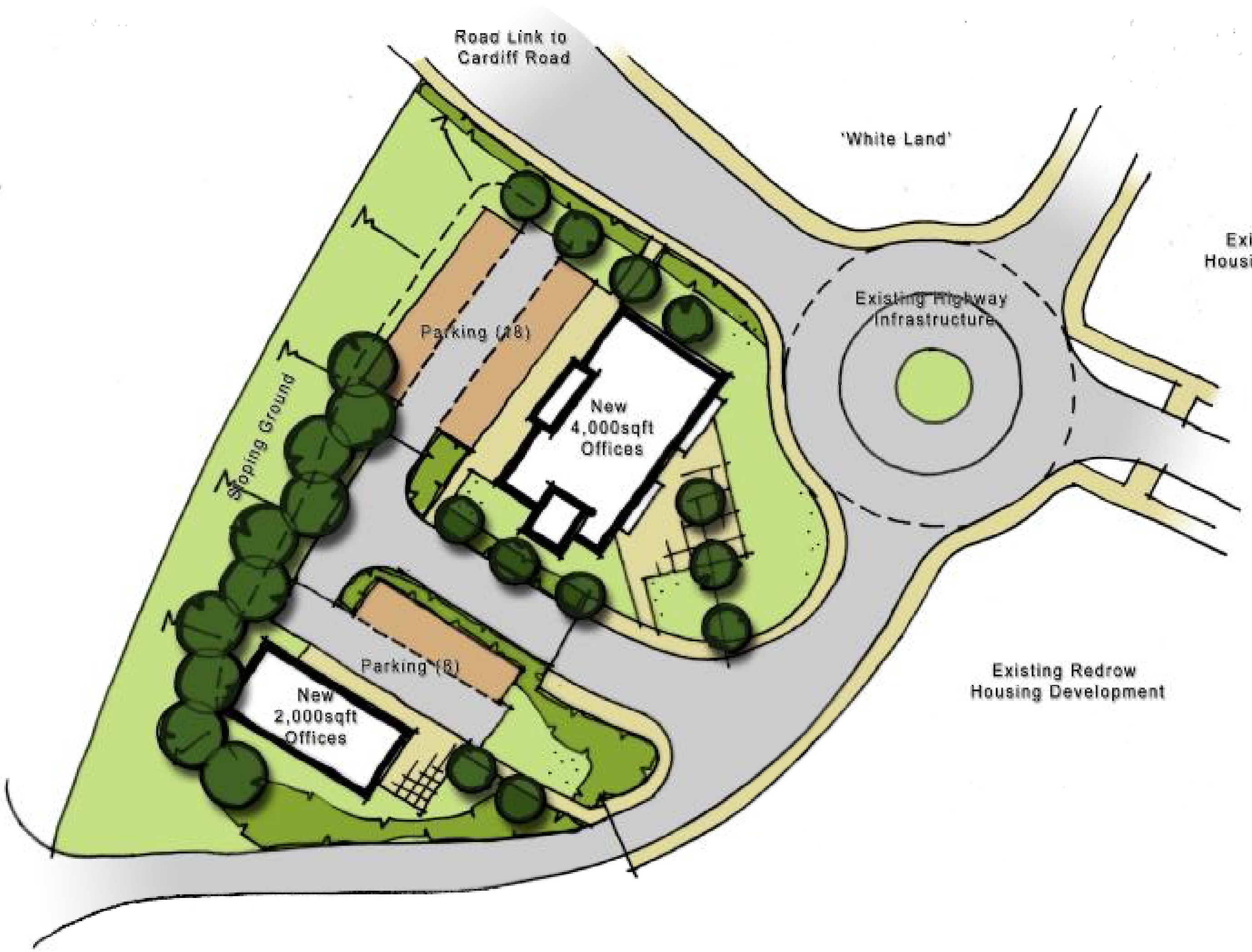
Interest in a range of other uses was received with the strongest interest from discount retailers and pub/restaurant users.

The marketing exercise has identified that there is no sustainable market for B1 uses at the site and as such, other uses should be explored.

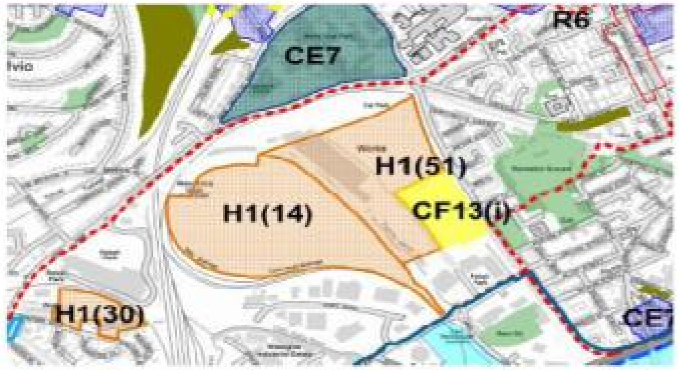
We therefore recommend that Network Rail approach the Council to consider a relaxation of the use restriction within the UU and to explore with them the acceptability of other uses that have come forward as part of the marketing exercise.

END

APPENDIX 1


Road Link to
Cardiff Road
'White Land'
Existing Redrow
Housing Development
Existing Highway
Infrastructure
Parking (18)
New
4,000sqft
Offices
Sloping Ground
Parking (8)
New
2,000sqft
Offices
Existing Redrow
Housing Development

APPENDIX 2

Site Location/ Context	 Site Feasibility Plan - Source: Kendall Kingscott - November (2015)	 Newport Local Development Plan (adopted January 2015) - Source: Newport City Council

APPENDIX 3

PROPOSED SITE FEASIBILITY 1:250 @ A1 - OPTION 1

REVISION

A: Area of "Unusable land" within GK Site Added to plan AP 05.02.16

Dimensions from GK boundary to railway line added

Manhole noted within GK site information from Network rail drawing
(further investigation required)

Land ownership boundary added - information taken from Network rail drawing

PembrookDesign

Summit House, Horsecroft Road, The Pinnacles, Harlow, Essex, CM19 5BN
Tel: 01279 433888. Fax: 01279 433889.
E-Mail: pembrook@pembrook.co.uk
Website: www.pembrook.co.uk

Client: Greene King

Project: MONBANK

Drawing Title: PROPOSED SITE FEASIBILITY OPTION 1

Drawing No: 2989.01
Scale: AS NOTED @ A1
Date: 04.01.16
Drawn By:

Revision: A

Drawing not to be scaled. Dimensions indicated must be checked on site before manufacture by contractor, any discrepancy should be reported immediately.

APPENDIX 4

MON BANK, NEWPORT - New Live/Work Development

Site Plan 1:500

Lloyd Collins

From: Scott Caldwell <SCaldwell@savills.com>
Sent: 30 June 2020 09:39
To: Scott Caldwell
Subject: FW: RE: Monbank Sidings White Land

From: Alun Lowe (Planning Contributions Manager) [mailto:Alun.Lowe@newport.gov.uk]
Sent: 28 November 2017 10:03 AM
To: SCaldwell@savills.com; Eilian.Jones@newport.gov.uk
Cc: Peter.GOODHART@networkrail.co.uk
Subject: RE: Monbank Sidings White Land

Scott

I can confirm that, as far as the Council is concerned, the marketing obligations (as set out in the UU) have been fully complied with

Thanks, Alun

Alun Lowe
Rheolwr Cyfraniadau Cynllunio / Planning Contributions Manager
Adfywio, Buddsoddi a Thai / Regeneration Investment & Housing
Cyngor Dinas Casnewydd / Newport City Council
01633 210087
Alun.Lowe@newport.gov.uk

From: Scott Caldwell [mailto:SCaldwell@savills.com]
Sent: 28 November 2017 08:18
To: Alun Lowe (Planning Contributions Manager); Eilian Jones (Principal Planning Officer)
Cc: Goodhart Peter
Subject: FW: Monbank Sidings White Land

Morning Alun,

It is sometime since we last met regarding the above site, in fact now over a year ago!

When we last met in October last year, we issued you with the attached marketing and disposal report and discussed potential alternative uses (subject of course to obtaining planning permission for any alternative use), given that the marketing period under the terms of Schedule Two of the UU had come to an end without us being able to identify or secure an operator for employment purposes.

We are making progressing with a number of potential parties/uses, and we (or they) will in due course be making contact with you to discuss their proposed uses prior to any formal application being made. However, in order for us to make substantive progress, it would be extremely useful if you were able to confirm in an email that as far as the Council is concerned, the marketing obligations as set out in the UU have been fully complied with?

I look forward to hearing from you and if you need to discuss further, please do not hesitate to call.

Kind regards

Scott

Scott Caldwell MRICS
Director
Development

Savills, 2 Kingsway , Cardiff CF10 3FD
Tel :+44 (0) 2920 368 943
Mobile :+44 (0) 7807 999 272
Email :scaldwell@savills.com
Website :www.savills.co.uk

From: Scott Caldwell
Sent: 06 October 2016 5:28 PM
To: 'Alun Lowe (Planning Contributions Manager)' <Alun.Lowe@newport.gov.uk>; Goodhart Peter (Peter.GOODHART@networkrail.co.uk) <Peter.GOODHART@networkrail.co.uk>
Cc: Eilian Jones <Eilian.Jones@newport.gov.uk>
Subject: RE: Monbank Sidings White Land

Alun

Thank you for the clarification.

I have also attached our report on the Marketing Process for your records.

Kind regards

Scott Caldwell MRICS
Director
Development
Savills, 12 Windsor Place , Cardiff CF10 3BY
Tel :+44 (0) 2920 368 943
Mobile :+44 (0) 7807 999 272
Email :scaldwell@savills.com
Website :www.savills.co.uk

From: Alun Lowe (Planning Contributions Manager) [mailto:Alun.Lowe@newport.gov.uk]
Sent: 06 October 2016 14:53
To: Goodhart Peter (Peter.GOODHART@networkrail.co.uk); Scott Caldwell
Cc: Eilian Jones
Subject: Monbank Sidings White Land

Hi Both

Further to today's meeting, please note that the potential CIL charge (dependent upon adoption by the Council in April 2017) requires 30% affordable housing provision and a charge level of £20 per sqm

Thanks, Alun

Alun Lowe
Rheolwr Cyfraniadau Cynllunio / Planning Contributions Manager
Adfywio, Buddsoddi a Thai / Regeneration Investment & Housing
Cyngor Dinas Casnewydd / Newport City Council
01633 210087
Alun.Lowe@newport.gov.uk

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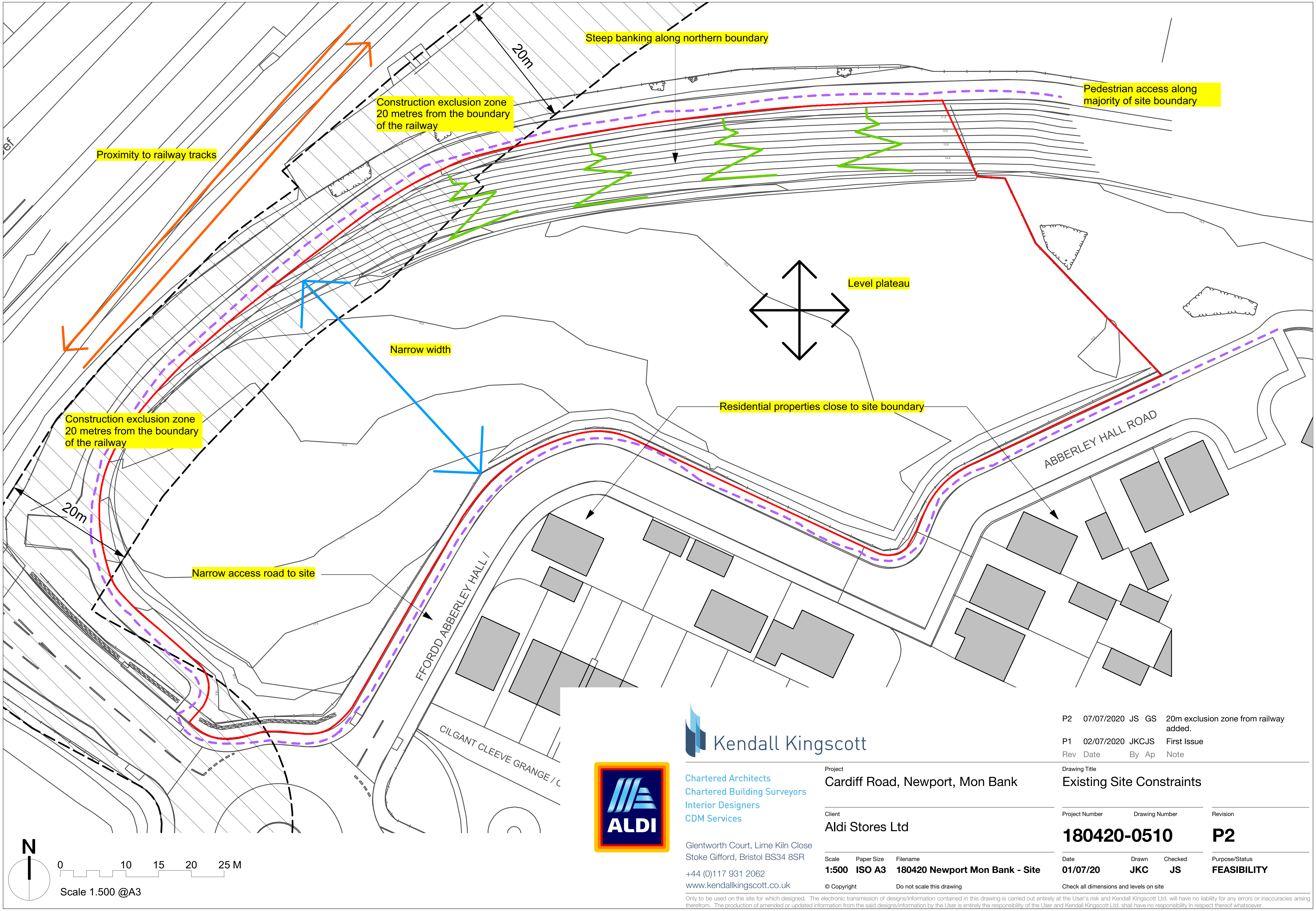
Appendix Three – Site Constraints Plan



Rev	Date	By	Ap	Note
P2	07/07/2020	JS	GS	20m exclusion zone from railway added.
P1	02/07/2020	JKC	JS	First Issue

Kendall Kingscott

Chartered Architects
Chartered Building Surveyors
Interior Designers
CDM Services

Glentworth Court, Lime Kiln Close
Stoke Gifford, Bristol BS34 8SR

+44 (0)117 931 2062
www.kendallkingscott.co.uk

ALDI

Project
Cardiff Road, Newport, Mon Bank

Drawing Title
Existing Site Constraints

Client
Aldi Stores Ltd

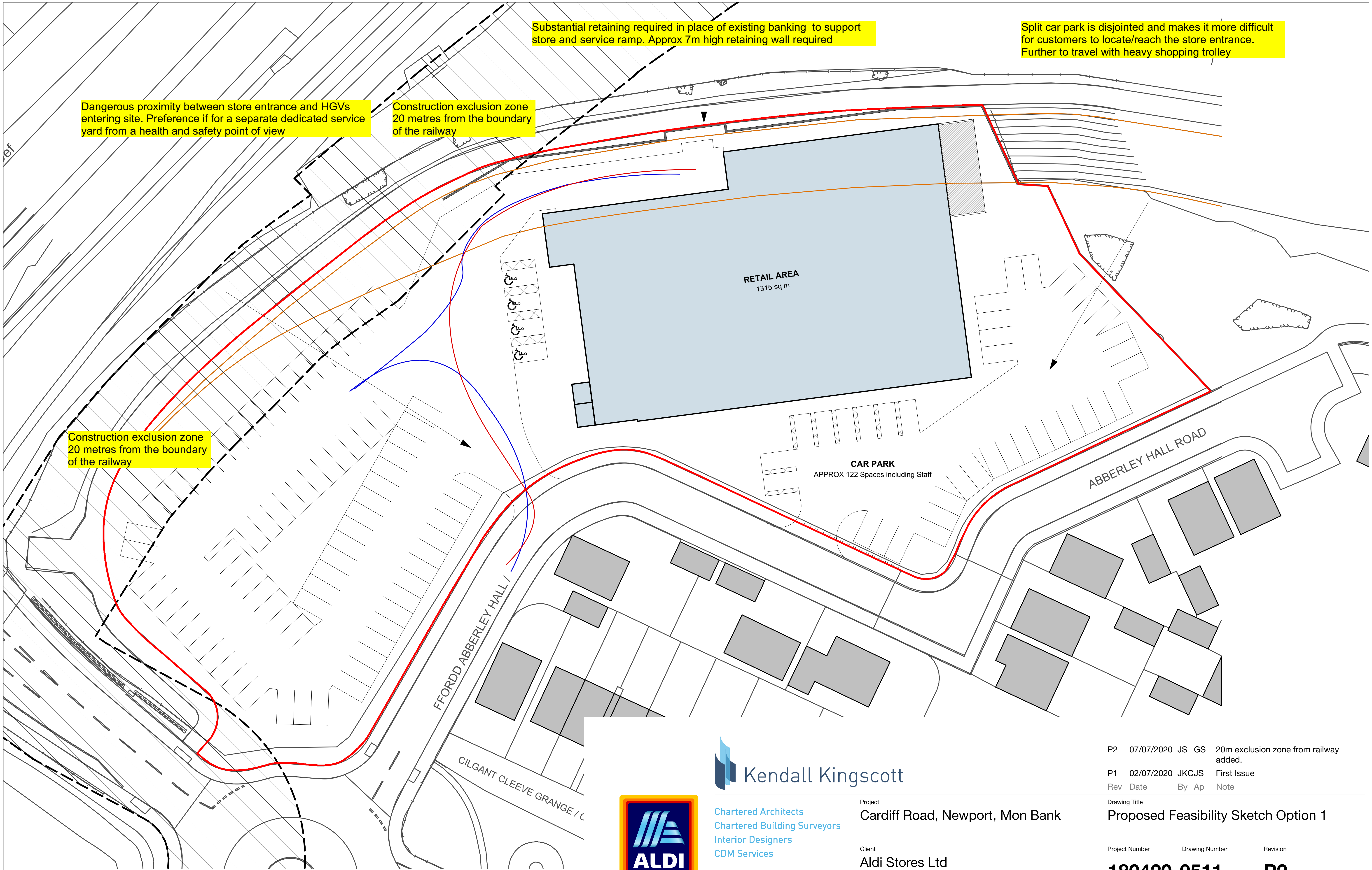
Project Number: 180420-0510
Drawing Number
Revision: P2

Scale: 1:500
Paper Size: ISO A3
Filename: 180420 Newport Mon Bank - Site
Date: 01/07/20
Drawn: JKC
Checked: JS
Purpose/Status: FEASIBILITY

Do not scale this drawing

Check all dimensions and levels on site

Appendix Four – Alternative Layouts



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ALDI

Rev	Date	By	Ap	Note
P2	07/07/2020	JS	GS	20m exclusion zone from railway added.
P1	02/07/2020	JKC	JS	First Issue

Project: Cardiff Road, Newport, Mon Bank

Drawing Title: Proposed Feasibility Sketch Option 1

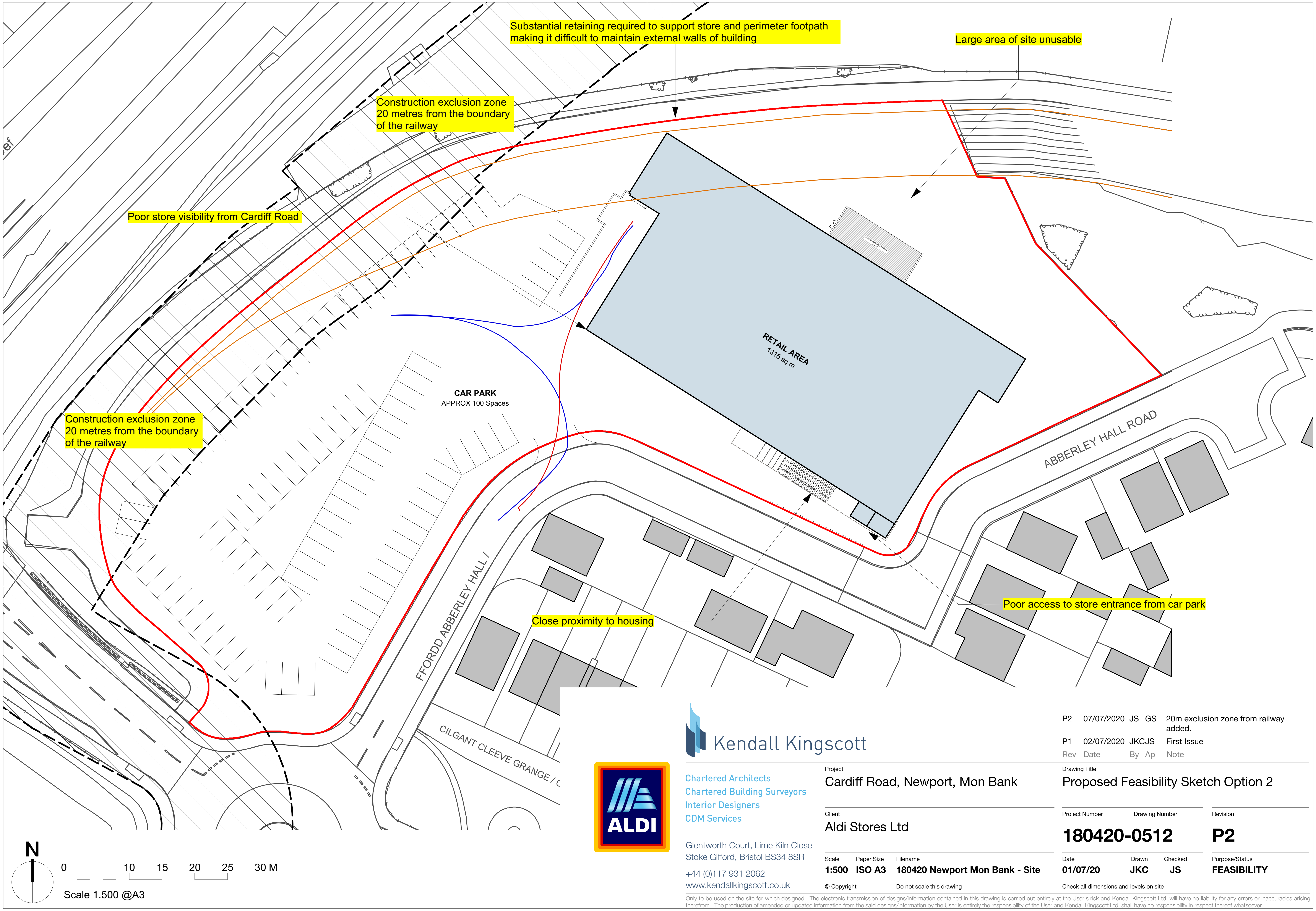
Client: Aldi Stores Ltd

Project Number	Drawing Number	Revision
180420-0511		P2

Scale	Paper Size	Filename	Date	Drawn	Checked	Purpose/Status
1:500	ISO A3	180420 Newport Mon Bank - Site	01/07/20	JKC	JS	FEASIBILITY

Do not scale this drawing

Check all dimensions and levels on site



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Stoke Gifford, Bristol BS34 8SR

+44 (0)117 931 2062
www.kendallkingscott.co.uk

Rev	Date	By	Ap	Note
P2	07/07/2020	JS	GS	20m exclusion zone from railway added.
P1	02/07/2020	JKC	JS	First Issue

Project
Cardiff Road, Newport, Mon Bank

Drawing Title
Proposed Feasibility Sketch Option 2

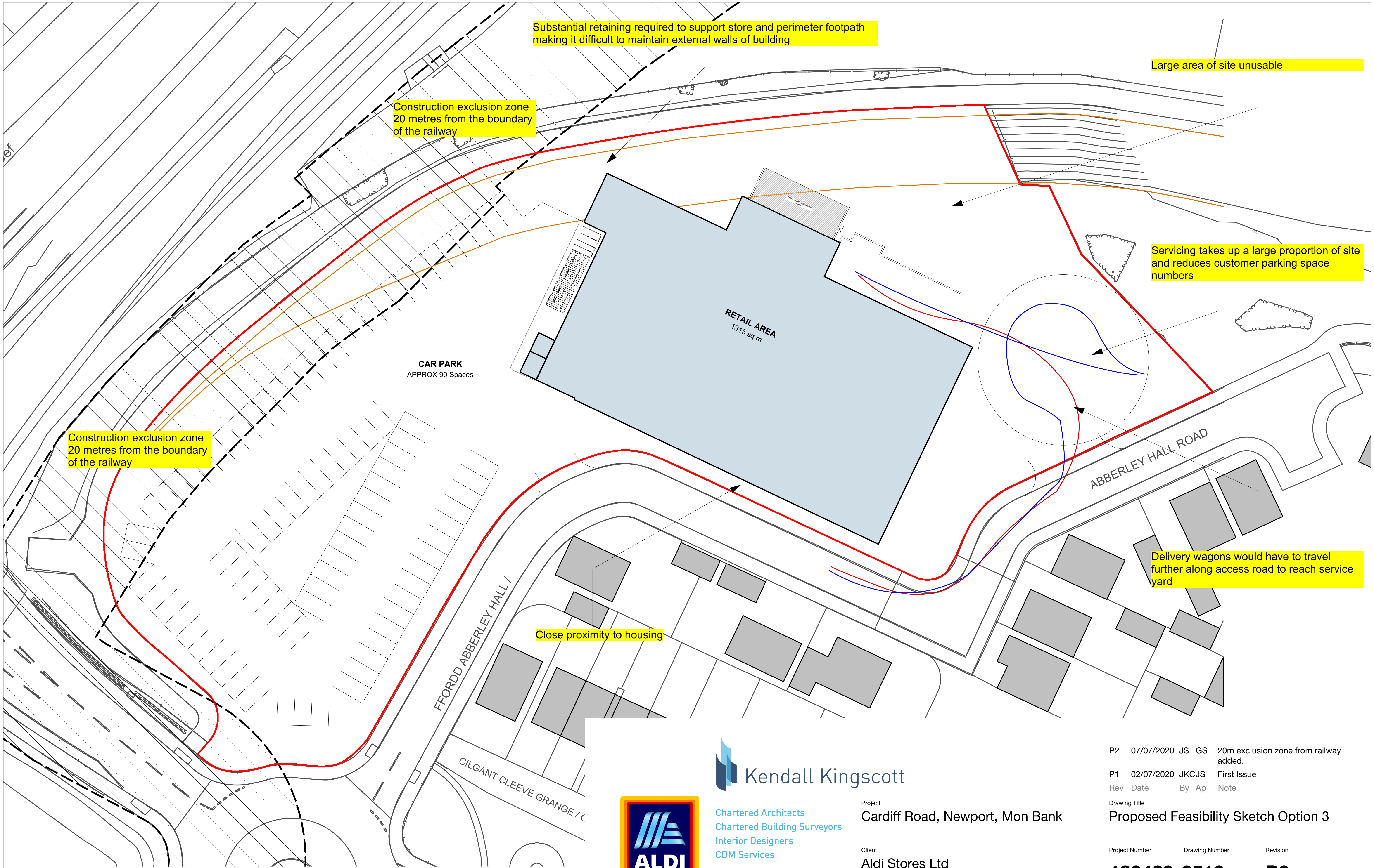
Client
Aldi Stores Ltd

Project Number: **180420-0512**
Drawing Number
Revision: **P2**

Scale	Paper Size	Filename	Date	Drawn	Checked	Purpose/Status
1:500	**ISO A3**	**180420 Newport Mon Bank - Site**	**01/07/20**	**JKC**	**JS**	**FEASIBILITY**

Do not scale this drawing

Check all dimensions and levels on site



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CDM Services

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www.kendallkingscott.co.uk

Rev	Date	By	Ap	Note
P2	07/07/2020	JS	GS	20m exclusion zone from railway added.
P1	02/07/2020	JKC	JS	First Issue

Project: Cardiff Road, Newport, Mon Bank

Drawing Title: Proposed Feasibility Sketch Option 3

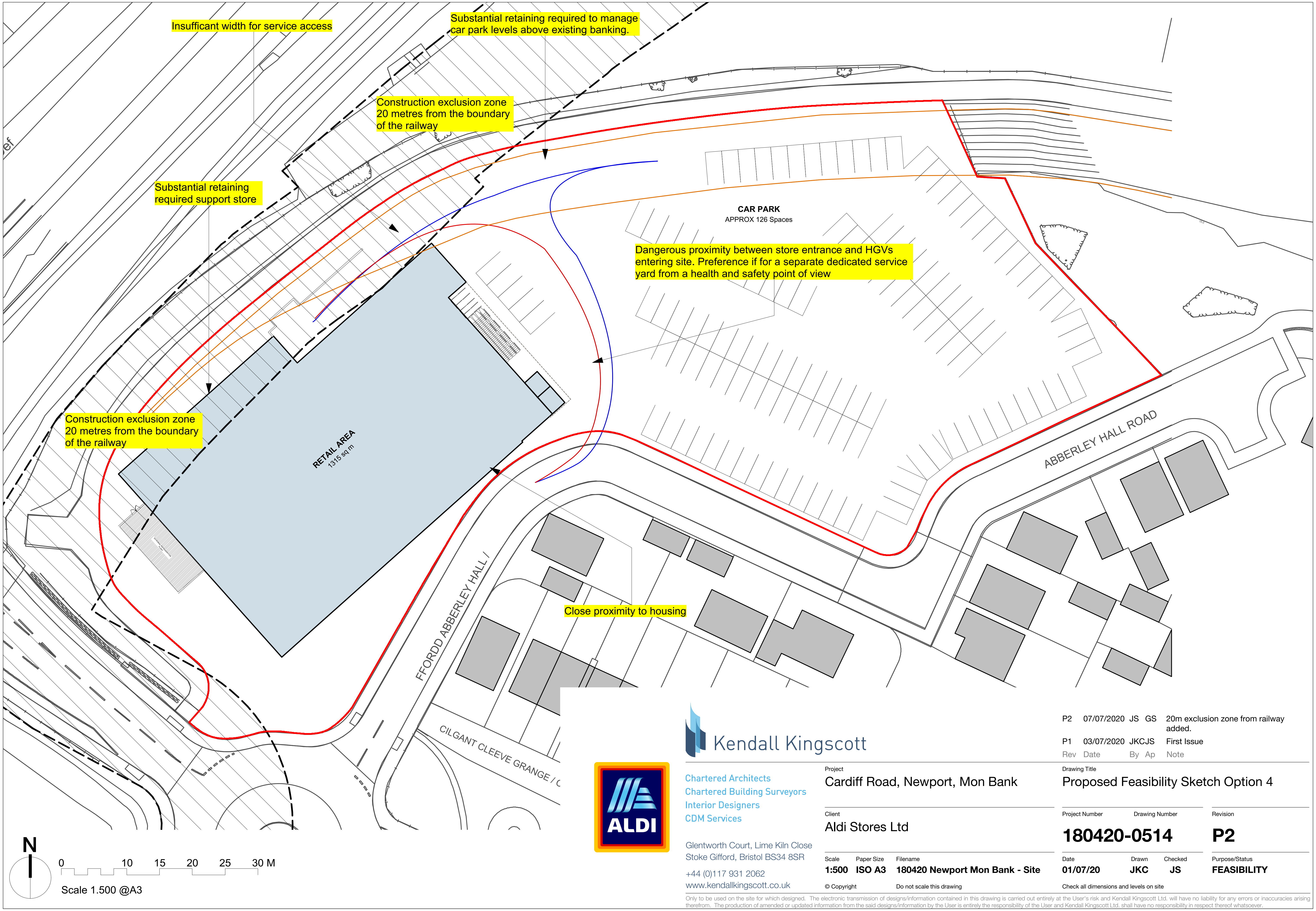
Client: Aldi Stores Ltd

Project Number	Drawing Number	Revision
180420-0513		P2

Scale	Paper Size	Filename	Date	Drawn	Checked	Purpose/Status
1:500	ISO A3	180420 Newport Mon Bank - Site	01/07/20	JKC	JS	FEASIBILITY

Do not scale this drawing

Check all dimensions and levels on site



Rev	Date	By	Ap	Note
P2	07/07/2020	JS	GS	20m exclusion zone from railway added.
P1	03/07/2020	JKC	JS	First Issue

Kendall Kingscott

Chartered Architects
Chartered Building Surveyors
Interior Designers
CDM Services

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Stoke Gifford, Bristol BS34 8SR

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www.kendallkingscott.co.uk

Project: Cardiff Road, Newport, Mon Bank

Drawing Title: Proposed Feasibility Sketch Option 4

Client: Aldi Stores Ltd

Project Number: 180420-0514

Drawing Number:

Revision: P2

Scale: 1:500

Paper Size: ISO A3

Filename: 180420 Newport Mon Bank - Site

Date: 01/07/20

Drawn: JKC

Checked: JS

Purpose/Status: FEASIBILITY