

BLACK COUNTRY CENTRES STUDY

2024 REFRESH: Volume 2

Prepared for:

The Black Country Authorities Comprising: City of Wolverhampton Council Dudley
Metropolitan Borough Council Sandwell Metropolitan Borough Council Walsall Council

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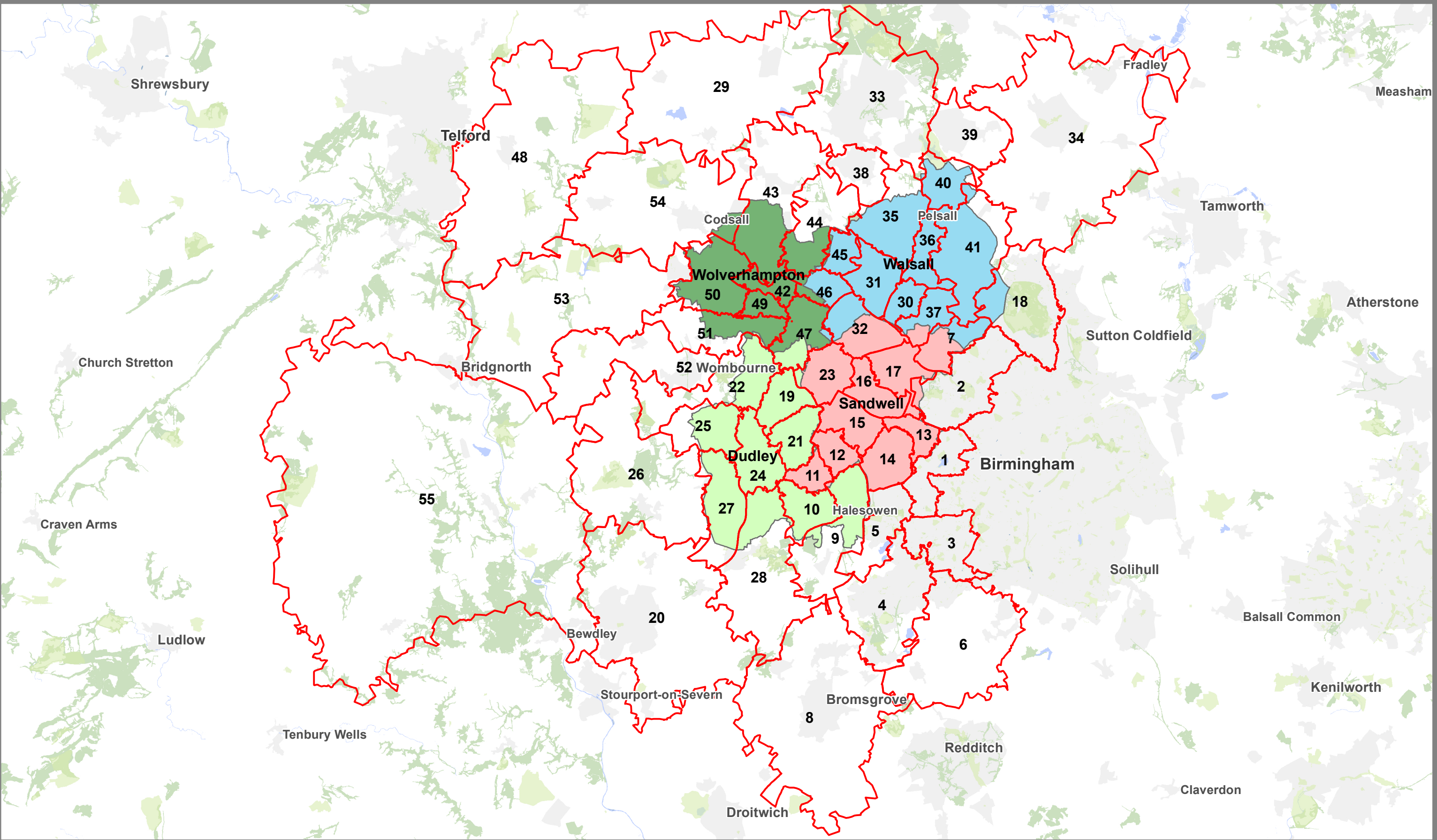


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Appendix 1: Defined Catchment Area & Zones

Black Country Zone Map



**Appendix 2: Population and Expenditure:
Convenience Goods**

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2024) POPULATION & PROJECTIONS (to 2042) GROWTH 2024 to 2042 (%)

ZONE:	2024	2026	2031	2036	2041	2042	2024-2031	2024-2036	2024-2042
Zone 1	74,761	75,340	76,816	78,638	80,464	80,817	2.7%	5.2%	8.1%
Zone 2	130,573	131,466	133,987	136,397	138,639	139,103	2.6%	4.5%	6.5%
Zone 3	76,316	76,756	78,048	79,023	79,872	80,003	2.3%	3.5%	4.8%
Zone 4	92,169	92,725	94,205	95,747	97,141	97,368	2.2%	3.9%	5.6%
Zone 5	40,272	40,542	41,135	41,703	42,168	42,266	2.1%	3.6%	5.0%
Zone 6	38,731	39,064	39,992	40,646	41,231	41,341	3.3%	4.9%	6.7%
Zone 7	30,612	30,838	31,235	31,600	31,980	32,037	2.0%	3.2%	4.7%
Zone 8	55,810	56,739	58,918	60,859	62,914	63,324	5.6%	9.0%	13.5%
Zone 9	25,798	25,982	26,473	26,907	27,323	27,403	2.6%	4.3%	6.2%
Zone 10	37,641	37,927	38,532	39,210	39,958	40,117	2.4%	4.2%	6.6%
Zone 11	19,344	19,479	19,872	20,202	20,619	20,704	2.7%	4.4%	7.0%
Zone 12	25,319	25,478	25,815	26,127	26,502	26,584	2.0%	3.2%	5.0%
Zone 13	26,748	27,137	28,065	29,044	30,191	30,435	4.9%	8.6%	13.8%
Zone 14	66,202	66,816	68,049	69,417	70,653	70,930	2.8%	4.9%	7.1%
Zone 15	32,211	32,517	33,328	34,143	35,052	35,219	3.5%	6.0%	9.3%
Zone 16	34,526	34,836	35,700	36,682	37,768	37,980	3.4%	6.2%	10.0%
Zone 17	34,025	34,280	34,895	35,631	36,474	36,640	2.6%	4.7%	7.7%
Zone 18	56,578	56,625	56,893	57,159	57,129	57,072	0.6%	1.0%	0.9%
Zone 19	35,789	36,131	37,095	38,199	39,537	39,856	3.6%	6.7%	11.4%
Zone 20	71,259	72,029	73,906	75,615	77,559	77,980	3.7%	6.1%	9.4%
Zone 21	37,291	37,748	38,858	40,124	41,590	41,931	4.2%	7.6%	12.4%
Zone 22	35,609	35,770	36,240	36,706	37,208	37,268	1.8%	3.1%	4.7%
Zone 23	48,101	48,505	49,607	50,771	52,150	52,432	3.1%	5.6%	9.0%
Zone 24	43,889	44,282	45,211	46,298	47,582	47,862	3.0%	5.5%	9.1%
Zone 25	29,305	29,434	29,691	29,878	30,097	30,092	1.3%	2.0%	2.7%
Zone 26	8,071	8,082	8,069	8,109	8,134	8,133	0.0%	0.5%	0.8%
Zone 27	52,424	52,786	53,551	54,267	55,007	55,149	2.1%	3.5%	5.2%
Zone 28	32,264	32,559	33,199	33,872	34,698	34,850	2.9%	5.0%	8.0%
Zone 29	16,128	16,226	16,474	16,688	16,946	17,006	2.1%	3.5%	5.4%
Zone 30	28,899	29,310	30,460	31,845	33,317	33,641	5.4%	10.2%	16.4%
Zone 31	43,142	43,769	45,441	47,141	49,014	49,411	5.3%	9.3%	14.5%
Zone 32	51,627	52,199	53,664	55,225	56,923	57,239	3.9%	7.0%	10.9%
Zone 33	83,417	84,417	86,669	89,012	91,541	92,062	3.9%	6.7%	10.4%
Zone 34	48,626	48,945	49,772	50,730	51,829	52,082	2.4%	4.3%	7.1%
Zone 35	55,045	55,636	56,963	58,212	59,576	59,825	3.5%	5.8%	8.7%
Zone 36	18,126	18,338	18,672	19,000	19,371	19,431	3.0%	4.8%	7.2%
Zone 37	22,389	22,569	23,136	23,707	24,269	24,386	3.3%	5.9%	8.9%
Zone 38	17,335	17,478	17,748	18,018	18,328	18,398	2.4%	3.9%	6.1%
Zone 39	30,203	30,347	30,737	31,089	31,557	31,638	1.8%	2.9%	4.8%
Zone 40	16,891	17,082	17,454	17,788	18,196	18,264	3.3%	5.3%	8.1%
Zone 41	27,055	27,177	27,477	27,683	27,820	27,834	1.6%	2.3%	2.9%
Zone 42	17,482	17,683	18,113	18,611	19,142	19,234	3.6%	6.5%	10.0%
Zone 43	63,468	64,147	65,788	67,605	69,656	70,065	3.7%	6.5%	10.4%
Zone 44	36,628	36,863	37,446	37,862	38,289	38,361	2.2%	3.4%	4.7%
Zone 45	26,012	26,267	26,754	27,228	27,655	27,743	2.9%	4.7%	6.7%
Zone 46	22,823	23,101	23,784	24,427	25,152	25,296	4.2%	7.0%	10.8%
Zone 47	52,294	52,832	54,130	55,447	56,893	57,192	3.5%	6.0%	9.4%
Zone 48	13,273	13,533	14,114	14,679	15,220	15,311	6.3%	10.6%	15.4%
Zone 49	20,689	20,944	21,554	22,204	22,909	23,073	4.2%	7.3%	11.5%
Zone 50	64,116	64,616	65,937	67,210	68,360	68,590	2.8%	4.8%	7.0%
Zone 51	35,032	35,338	35,918	36,402	36,906	37,008	2.5%	3.9%	5.6%
Zone 52	15,754	15,841	16,005	16,171	16,388	16,433	1.6%	2.6%	4.3%
Zone 53	16,897	17,057	17,478	17,839	18,198	18,273	3.4%	5.6%	8.1%
Zone 54	30,566	30,790	31,419	31,913	32,441	32,536	2.8%	4.4%	6.4%
Zone 55	27,983	28,418	29,294	30,020	30,587	30,685	4.7%	7.3%	9.7%
Study Area	2,193,538	2,212,796	2,259,786	2,306,730	2,356,123	2,365,913	3.0%	5.2%	7.9%

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2024) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2024	2024	2026	2031	2036	2041	2042
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
EXPERIAN - SPECIAL FORMS OF TRADING (%):		5.2%	5.8%	6.6%	7.2%	7.4%	7.4%
REVISED SPECIAL FORMS OF TRADING (%):		2.4%	2.7%	3.0%	3.3%	3.4%	3.4%
Zone 1	£2,256	£2,201	£2,191	£2,185	£2,189	£2,198	£2,200
Zone 2	£2,048	£1,999	£1,989	£1,984	£1,988	£1,996	£1,998
Zone 3	£2,192	£2,139	£2,129	£2,123	£2,128	£2,136	£2,138
Zone 4	£2,365	£2,308	£2,297	£2,290	£2,295	£2,305	£2,307
Zone 5	£2,268	£2,214	£2,203	£2,197	£2,202	£2,210	£2,213
Zone 6	£2,516	£2,456	£2,444	£2,437	£2,442	£2,452	£2,455
Zone 7	£2,338	£2,282	£2,270	£2,264	£2,269	£2,278	£2,280
Zone 8	£2,677	£2,613	£2,600	£2,593	£2,599	£2,609	£2,612
Zone 9	£2,495	£2,435	£2,423	£2,417	£2,422	£2,431	£2,434
Zone 10	£2,444	£2,385	£2,374	£2,367	£2,372	£2,382	£2,384
Zone 11	£2,220	£2,167	£2,156	£2,150	£2,155	£2,163	£2,166
Zone 12	£2,259	£2,205	£2,195	£2,188	£2,193	£2,202	£2,204
Zone 13	£1,853	£1,809	£1,800	£1,795	£1,799	£1,806	£1,808
Zone 14	£2,107	£2,056	£2,046	£2,041	£2,045	£2,053	£2,055
Zone 15	£2,117	£2,066	£2,056	£2,050	£2,054	£2,063	£2,065
Zone 16	£1,946	£1,899	£1,890	£1,885	£1,889	£1,896	£1,898
Zone 17	£2,112	£2,061	£2,051	£2,045	£2,050	£2,058	£2,060
Zone 18	£2,699	£2,634	£2,621	£2,614	£2,619	£2,630	£2,633
Zone 19	£2,244	£2,190	£2,180	£2,173	£2,178	£2,187	£2,189
Zone 20	£2,537	£2,476	£2,465	£2,458	£2,463	£2,473	£2,475
Zone 21	£2,124	£2,073	£2,063	£2,058	£2,062	£2,070	£2,072
Zone 22	£2,491	£2,431	£2,420	£2,413	£2,418	£2,428	£2,430
Zone 23	£2,063	£2,013	£2,003	£1,998	£2,002	£2,010	£2,012
Zone 24	£2,329	£2,273	£2,262	£2,256	£2,261	£2,270	£2,272
Zone 25	£2,580	£2,518	£2,506	£2,499	£2,504	£2,514	£2,517
Zone 26	£3,056	£2,982	£2,968	£2,960	£2,966	£2,978	£2,981
Zone 27	£2,597	£2,535	£2,523	£2,516	£2,521	£2,531	£2,534
Zone 28	£2,594	£2,532	£2,520	£2,513	£2,518	£2,528	£2,531
Zone 29	£2,752	£2,686	£2,673	£2,665	£2,671	£2,682	£2,684
Zone 30	£2,039	£1,990	£1,981	£1,975	£1,979	£1,988	£1,990
Zone 31	£2,002	£1,954	£1,944	£1,939	£1,943	£1,951	£1,953
Zone 32	£2,033	£1,984	£1,974	£1,969	£1,973	£1,981	£1,983
Zone 33	£2,489	£2,429	£2,418	£2,411	£2,416	£2,426	£2,428
Zone 34	£2,742	£2,676	£2,663	£2,656	£2,662	£2,672	£2,675
Zone 35	£2,193	£2,140	£2,130	£2,124	£2,128	£2,137	£2,139
Zone 36	£2,386	£2,329	£2,317	£2,311	£2,316	£2,325	£2,328
Zone 37	£2,248	£2,194	£2,183	£2,177	£2,182	£2,191	£2,193
Zone 38	£2,507	£2,447	£2,435	£2,429	£2,434	£2,444	£2,446
Zone 39	£2,530	£2,469	£2,457	£2,450	£2,455	£2,465	£2,468
Zone 40	£2,328	£2,272	£2,261	£2,255	£2,260	£2,269	£2,271
Zone 41	£2,587	£2,525	£2,512	£2,505	£2,511	£2,521	£2,523
Zone 42	£2,129	£2,078	£2,068	£2,062	£2,067	£2,075	£2,077
Zone 43	£2,166	£2,114	£2,104	£2,098	£2,102	£2,111	£2,113
Zone 44	£2,323	£2,267	£2,256	£2,250	£2,255	£2,264	£2,266
Zone 45	£2,281	£2,226	£2,215	£2,209	£2,214	£2,223	£2,225
Zone 46	£2,146	£2,095	£2,085	£2,079	£2,083	£2,092	£2,094
Zone 47	£2,165	£2,113	£2,103	£2,097	£2,101	£2,110	£2,112
Zone 48	£2,730	£2,665	£2,652	£2,645	£2,650	£2,661	£2,664
Zone 49	£1,959	£1,912	£1,903	£1,898	£1,902	£1,909	£1,911
Zone 50	£2,379	£2,322	£2,311	£2,304	£2,309	£2,319	£2,321
Zone 51	£2,312	£2,256	£2,245	£2,239	£2,244	£2,253	£2,255
Zone 52	£2,737	£2,671	£2,659	£2,651	£2,657	£2,668	£2,670
Zone 53	£2,763	£2,697	£2,684	£2,676	£2,682	£2,693	£2,696
Zone 54	£2,607	£2,544	£2,532	£2,525	£2,530	£2,541	£2,543
Zone 55	£2,769	£2,703	£2,690	£2,682	£2,688	£2,699	£2,701
STUDY AREA AVERAGE:	£2,360	£2,304	£2,293	£2,286	£2,291	£2,300	£2,303

Source: Average spend per capita estimates (2022 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 21 published by Experian Business Strategies (February 2024).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 21 (February 2024).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2024) TO 2042 (£m) GROWTH 2024 to 2042 (%)

	2024	2024	2026	2031	2036	2041	2042	2024-2031	2024-2036	2024-2042
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING								
Zone 1	168.6	164.6	165.1	167.8	172.2	176.9	177.8	2.0%	4.6%	8.1%
Zone 2	267.4	261.0	261.5	265.8	271.1	276.7	277.9	1.8%	3.9%	6.5%
Zone 3	167.3	163.3	163.4	165.7	168.1	170.6	171.1	1.5%	3.0%	4.8%
Zone 4	217.9	212.7	213.0	215.8	219.8	223.9	224.6	1.4%	3.3%	5.6%
Zone 5	91.3	89.1	89.3	90.4	91.8	93.2	93.5	1.4%	3.0%	4.9%
Zone 6	97.5	95.1	95.5	97.5	99.3	101.1	101.5	2.5%	4.4%	6.7%
Zone 7	71.6	69.8	70.0	70.7	71.7	72.9	73.1	1.3%	2.7%	4.6%
Zone 8	149.4	145.8	147.5	152.8	158.2	164.2	165.4	4.8%	8.4%	13.4%
Zone 9	64.4	62.8	63.0	64.0	65.2	66.4	66.7	1.8%	3.7%	6.2%
Zone 10	92.0	89.8	90.0	91.2	93.0	95.2	95.6	1.6%	3.6%	6.5%
Zone 11	42.9	41.9	42.0	42.7	43.5	44.6	44.8	1.9%	3.9%	7.0%
Zone 12	57.2	55.8	55.9	56.5	57.3	58.4	58.6	1.2%	2.6%	4.9%
Zone 13	49.6	48.4	48.8	50.4	52.2	54.5	55.0	4.1%	8.0%	13.7%
Zone 14	139.5	136.1	136.7	138.9	142.0	145.1	145.8	2.0%	4.3%	7.1%
Zone 15	68.2	66.5	66.8	68.3	70.1	72.3	72.7	2.7%	5.4%	9.3%
Zone 16	67.2	65.6	65.8	67.3	69.3	71.6	72.1	2.6%	5.7%	10.0%
Zone 17	71.9	70.1	70.3	71.4	73.0	75.1	75.5	1.8%	4.1%	7.6%
Zone 18	152.7	149.0	148.4	148.7	149.7	150.2	150.2	-0.2%	0.5%	0.8%
Zone 19	80.3	78.4	78.7	80.6	83.2	86.5	87.2	2.9%	6.1%	11.3%
Zone 20	180.8	176.5	177.5	181.6	186.2	191.8	193.0	2.9%	5.5%	9.4%
Zone 21	79.2	77.3	77.9	80.0	82.7	86.1	86.9	3.4%	7.0%	12.4%
Zone 22	88.7	86.6	86.5	87.4	88.8	90.3	90.6	1.0%	2.5%	4.6%
Zone 23	99.2	96.8	97.2	99.1	101.6	104.8	105.5	2.3%	5.0%	9.0%
Zone 24	102.2	99.8	100.2	102.0	104.7	108.0	108.7	2.2%	4.9%	9.0%
Zone 25	75.6	73.8	73.8	74.2	74.8	75.7	75.7	0.5%	1.4%	2.6%
Zone 26	24.7	24.1	24.0	23.9	24.1	24.2	24.2	-0.8%	-0.1%	0.7%
Zone 27	136.2	132.9	133.2	134.7	136.8	139.2	139.7	1.4%	2.9%	5.1%
Zone 28	83.7	81.7	82.0	83.4	85.3	87.7	88.2	2.1%	4.4%	8.0%
Zone 29	44.4	43.3	43.4	43.9	44.6	45.4	45.7	1.4%	2.9%	5.4%
Zone 30	58.9	57.5	58.1	60.2	63.0	66.2	66.9	4.6%	9.6%	16.4%
Zone 31	86.4	84.3	85.1	88.1	91.6	95.6	96.5	4.5%	8.7%	14.5%
Zone 32	104.9	102.4	103.1	105.6	109.0	112.8	113.5	3.2%	6.4%	10.8%
Zone 33	207.6	202.7	204.1	209.0	215.1	222.1	223.6	3.1%	6.1%	10.3%
Zone 34	133.3	130.1	130.4	132.2	135.0	138.5	139.3	1.6%	3.8%	7.1%
Zone 35	120.7	117.8	118.5	121.0	123.9	127.3	128.0	2.7%	5.2%	8.6%
Zone 36	43.2	42.2	42.5	43.1	44.0	45.0	45.2	2.2%	4.2%	7.1%
Zone 37	50.3	49.1	49.3	50.4	51.7	53.2	53.5	2.5%	5.3%	8.9%
Zone 38	43.5	42.4	42.6	43.1	43.9	44.8	45.0	1.6%	3.4%	6.1%
Zone 39	76.4	74.6	74.6	75.3	76.3	77.8	78.1	1.0%	2.4%	4.7%
Zone 40	39.3	38.4	38.6	39.4	40.2	41.3	41.5	2.5%	4.7%	8.1%
Zone 41	70.0	68.3	68.3	68.8	69.5	70.1	70.2	0.8%	1.8%	2.8%
Zone 42	37.2	36.3	36.6	37.4	38.5	39.7	40.0	2.8%	5.9%	10.0%
Zone 43	137.5	134.2	134.9	138.0	142.1	147.0	148.0	2.9%	5.9%	10.3%
Zone 44	85.1	83.0	83.2	84.3	85.4	86.7	86.9	1.5%	2.8%	4.7%
Zone 45	59.3	57.9	58.2	59.1	60.3	61.5	61.7	2.1%	4.1%	6.6%
Zone 46	49.0	47.8	48.2	49.4	50.9	52.6	53.0	3.4%	6.4%	10.8%
Zone 47	113.2	110.5	111.1	113.5	116.5	120.0	120.8	2.7%	5.4%	9.3%
Zone 48	36.2	35.4	35.9	37.3	38.9	40.5	40.8	5.5%	10.0%	15.3%
Zone 49	40.5	39.6	39.9	40.9	42.2	43.7	44.1	3.4%	6.7%	11.5%
Zone 50	152.5	148.9	149.3	151.9	155.2	158.5	159.2	2.1%	4.3%	6.9%
Zone 51	81.0	79.0	79.3	80.4	81.7	83.1	83.5	1.7%	3.3%	5.6%
Zone 52	43.1	42.1	42.1	42.4	43.0	43.7	43.9	0.8%	2.1%	4.3%
Zone 53	46.7	45.6	45.8	46.8	47.8	49.0	49.3	2.7%	5.0%	8.1%
Zone 54	79.7	77.8	78.0	79.3	80.8	82.4	82.7	2.0%	3.8%	6.4%
Zone 55	77.5	75.6	76.4	78.6	80.7	82.5	82.9	3.9%	6.7%	9.6%
STUDY AREA:	5,104.6	4,982.2	5,001.3	5,092.1	5,207.3	5,338.4	5,365.5	2.2%	4.5%	7.7%

**Appendix 3: Convenience Goods Market Shares
(including SFT)**

TABLE 3: OTHER /SECONDARY/ MAIN FOOD PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading
Based on 2024 Household Surveys

Table with columns for LOCAL PLANNING AUTHORITY, CENTRE TYPE, and 52 CORE ZONES (Zone 1 to Zone 52). Rows include various shopping centres like Wolverhampton, Dudley, Sandwell, and Walsall, with subtotals for each. The table contains market share percentages for numerous retailers across all zones, plus a 'GRAND TOTAL' row at the bottom.

TABLE 6: OTHER TOP UP FUP PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading
Based on 2024 Household Survey

Table with columns for Local Planning Authority, Centre Type, Centre Name, and 50+ Market Share percentages. Includes sub-sections for Wolverhampton, Dudley, Sandwell, and Walsall, with a 'GRAND TOTAL' row at the bottom.

**Appendix 4: Convenience Goods Turnover
(excluding SFT)**

**Appendix 5A: Convenience Goods Capacity: City of
Wolverhampton**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Wolverhampton									
	Strategic Centre	Wolverhampton	0%	£161.5	£162.1	£165.1	£168.8	£173.0	£173.9
	Town Centre	Bilston Wednesfield	0%	£84.2	£84.5	£86.1	£88.0	£90.2	£90.7
	District & Local Centres		0%	£5.1	£5.1	£5.2	£5.4	£5.5	£5.5
	Out-of-Centre		0%	£144.4	£144.9	£147.5	£150.9	£154.7	£155.5
			0%	£267.5	£268.5	£273.4	£279.6	£286.6	£288.1
City of Wolverhampton Council Area				£662.6	£665.2	£677.3	£692.6	£710.0	£713.6

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] Wolverhampton - Edge-of-City Centre	16/00598/PAOTH	Interchange: Railway Station - Wolverhampton Railway Station Railway Drive City Centre Wolverhampton West Midlands WV1 1LE	825	356	10,000	£3.6	£3.6	£3.6	£3.7	£3.7	£3.7
[2] Wolverhampton - Out-of-Centre	13/00871/FUL	Pountney Street, unit shops - Change of use of the existing basement area to create a mixed use development comprising retail units, bar, restaurant, creche and indoor parking Basement Of Former J W Braithwaite Pountney Street Wolverhampton West Midlands WV2 4HX	1,098	384	5,500	£2.1	£2.1	£2.1	£2.2	£2.2	£2.2
[3] Wolverhampton - Out-of-Centre	16/00678/FUL	Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. New Food Retail Store.	1,505	1,064	11,000	£11.7	£11.7	£11.8	£12.0	£12.2	£12.2
[4] Parkfield Local Centre	19/01048/FUL	Aldi, Parkfield	421	320	11,000	£3.5	£3.5	£3.6	£3.6	£3.7	£3.7
[5] Bilston - 72-84 High St, Bilston.	21/01456/FUL	Lidl, Bilston	2,486	327	11,000	£3.6	£3.6	£3.6	£3.7	£3.7	£3.8
[6] Wolverhampton (Out-of-Centre)	21/00402/FUL	Lidl - Former Quality Hotel Site, 126 Penn Road	1,926	943	11,000	£10.4	£10.4	£10.5	£10.6	£10.8	£10.8
[7] Wolverhampton (Out-of-Centre)	23/00380/FUL	Former Talisman PH Wildtree Avenue	308	273	11,000	£3.0	£3.0	£3.0	£3.1	£3.1	£3.1
[8] Wolverhampton (Out-of-Centre)	22/01168/RC & 23/01227/RC	Home Bargains Unit C4 Bentley Bridge Retail Park Bentleybridge Way Wolverhampton	2,603	500	11,000	£5.5	£5.5	£5.6	£5.6	£5.7	£5.7
[9] Whitmore Reans (Avion Centre)	23/01219/FUL	Former Bagot Arms PH Newhampton Road West WV6 0RX	607	136	5,500	£0.7	£0.7	£0.8	£0.8	£0.8	£0.8
[10] Blakenhall (Dudley Road)	24/00092/FUL	Shri Guru Ravidass Community Centre, 372 - 379 Dudley Road - creation of four retail units	430	58	5,500	£0.3	£0.3	£0.3	£0.3	£0.3	£0.3
TOTAL			11,779	4,303		£44.4	£44.4	£44.9	£45.6	£46.3	£46.4

Notes:

- [1] Built-out, Council states two convenience units with a floorpace of 356sqm net.
- [2] One 120sqm unit built out, previously occupied by a comparison operator and now vacant. Assumed that of the total permitted floorpace of 1,098 sqm the convenience /comparison split will be 50% / 50% and netted down using a gross to net factor of 70%.
- [3] Built-out, occupied. Of the 1,254sqmnet sales area 190sqm net is for comparison goods and the remaining 1,064sqm net is convenience goods.
- [4] Built-out, Aldi Goldthorn Hill Wolverhampton, WV2 3HR. Extension of existing food retail store (Class A1) with associated alterations to existing car parking, access, servicing & landscaping. Net increase of 320 sqm is for convenience goods.
- [5] Lidl Bilston - Land And Buildings At 72-84 High St WV14 0EZ. Demolition of existing buildings and erection of a retail foodstore (Class E) and two commercial units (Class E) with access, car parking, landscaping and associated engineering works. Planning permission granted and conditions discharged. The Council details that the replacement Lidl store would create an additional 327sqm convenience goods net sales area.
- [6] Lidl - Former Quality Hotel Site, 126 Penn Road (including 42 Oaklands Road And Business Centre) Wolverhampton WV3 0ER Demolition of existing buildings and erection of a Class E limited assortment foodstore with associated car parking, access, landscaping and engineering works. Council has detailed planning permission granted and s108 signed. Condition restricts convenience sales area to 943sqm net and comparison goods to 236 sqm net.
- [7] Former Talisman PH, Wildtree Avenue, Wolverhampton - erection of retail convenience store unit (Ea) and 14No., 1 & 2 bedroom apartments (C3) with associated parking areas, landscaping, amenity space and ancillary development. Council has provided a gross retail area of 308 sqm and a net retail floorpace area of some 273 sqm.
- [8] Minor Material Amendment to vary condition 6 of planning permission 22/00448/RC to allow 550 square metres of food retailing use within Unit A1/A2 (a proposed uplift in retail food use within Unit A1/A2 of 272 sqm); and Minor Material Amendment to vary condition 6 of planning permission 22/01168/RC to allow an additional 228 square metres of food retail space within Unit C4. Council has provided a gross retail area of 2,603 sqm and a net retail floorpace area of some 500 sqm all for convenience goods.
- [9] Former Bagot Arms PH Newhampton Road West WV6 0RX - alterations and extensions to form eight retail units (Use Class E) at ground floor level and three one bedroom apartments at first floor level. Planning permission granted. Council has provided a gross retail area of 607 sqm and a net floorpace area of some 272 sqm net. Of this net floorpace it is assumed that it is split evenly between convenience (136sqm net) and comparison goods (136sqm net).
- [10] Shri Guru Ravidass Community Centre, 372 - 379 Dudley Road - creation of four retail units. Planning permission granted. Council has provided a gross retail area of 430sqm and a net floorpace area of some 116 sqm net. Of this net floorpace it is assumed that it is split evenly between convenience (58sqm net) and comparison goods (58sqm net).

TABLE 3: CITY OF WOLVERHAMPTON COUNCIL AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£662.6	£665.2	£677.3	£692.6	£710.0	£713.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£662.6	£662.6	£670.0	£680.1	£690.3	£692.4
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£2.5	£7.3	£12.5	£19.7	£21.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£44.4	£44.9	£45.6	£46.3	£46.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£41.9	-£37.6	-£33.1	-£26.6	-£25.2
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorpace Capacity (sq m):	-	-3,351	-2,977	-2,579	-2,043	-1,930
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-4,787	-4,253	-3,684	-2,918	-2,757
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorpace Capacity (sq m):	-	-5,954	-5,317	-4,665	-3,648	-3,446
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	170%
(iv) Gross Floorpace Capacity (sq m):		-8,549	-7,595	-6,579	-5,211	-2,027

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgets, etc.).

TABLE 4: CITY OF WOLVERHAMPTON COUNCIL: STRATEGIC CENTRE: WOLVERHAMPTON - CONVENIENCE GOODS CAPACITY ASSESSMENT
 Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£161.5	£162.1	£165.1	£168.8	£173.0	£173.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£161.5	£161.5	£163.3	£165.7	£168.2	£168.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.6	£1.8	£3.1	£4.8	£5.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£3.6	£3.6	£3.7	£3.7	£3.7
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£2.9	-£1.8	-£0.6	£1.1	£1.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorpace Capacity (sq m):		-235	-144	-47	84	111
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-336	-206	-67	120	159
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorpace Capacity (sq m):		-420	-257	-84	150	199
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-600	-367	-120	214	284

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 5: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: BILSTON - CONVENIENCE GOODS CAPACITY ASSESSMENT
 Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£84.2	£84.5	£86.1	£88.0	£90.2	£90.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£84.2	£84.2	£85.1	£86.4	£87.7	£88.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.9	£1.6	£2.5	£2.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£3.6	£3.6	£3.7	£3.7	£3.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£3.3	-£2.7	-£2.1	-£1.2	-£1.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorpace Capacity (sq m):		-262	-214	-164	-96	-81
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-374	-306	-234	-137	-116
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorpace Capacity (sq m):		-468	-383	-292	-171	-145
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-668	-547	-418	-244	-207

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 6: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: WEDNESFIELD - CONVENIENCE GOODS CAPACITY ASSESSMENT
 Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£5.1	£5.1	£5.2	£5.4	£5.5	£5.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£5.1	£5.1	£5.2	£5.3	£5.3	£5.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.1	£0.2	£0.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.1	£0.2	£0.2
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorpace Capacity (sq m):		2	4	8	12	13
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		2	6	11	17	18
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorpace Capacity (sq m):		3	8	13	21	22
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		4	11	19	30	32

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 7: CITY OF WOLVERHAMPTON COUNCIL: DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£144.4	£144.9	£147.5	£150.9	£154.7	£155.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£144.4	£144.4	£146.0	£148.2	£150.4	£150.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.6	£1.6	£2.7	£4.3	£4.6
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£4.6	£4.6	£4.7	£4.8	£4.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£4.0	-£3.0	-£2.0	-£0.5	-£0.2
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-323	-241	-154	-37	-13
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-461	-344	-220	-54	-19
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-576	-431	-276	-67	-23
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-823	-615	-394	-96	-33

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 8: CITY OF WOLVERHAMPTON COUNCIL: OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£267.5	£268.5	£273.4	£279.6	£286.6	£288.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£267.5	£267.5	£270.4	£274.5	£278.7	£279.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.0	£2.9	£5.1	£7.9	£8.6
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£32.7	£33.1	£33.6	£34.1	£34.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£31.7	-£30.1	-£28.5	-£26.1	-£25.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-2,533	-2,382	-2,222	-2,005	-1,960
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-3,619	-3,403	-3,174	-2,864	-2,799
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-4,524	-4,254	-3,967	-3,580	-3,499
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-6,462	-6,077	-5,667	-5,115	-4,999

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 9: CITY OF WOLVERHAMPTON COUNCIL: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

CENTRE TYPE	STORE FORMAT									
	Foodstore Format (sqm net)					Local Supermarket / Deep Discounter Format (sqm net)				
	2026	2031	2036	2041	2042	2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)	-£41.9	-£37.6	-£33.1	-£26.6	-£25.2	-£41.9	-£37.6	-£33.1	-£26.6	####
Strategic Centre										
Wolverhampton	-235	-144	-47	84	111	-420	-257	-84	150	199
Town Centre										
Bilston	-262	-214	-164	-96	-81	-468	-383	-292	-171	-145
Wednesfield	2	4	8	12	13	3	8	13	21	22
District & Local Centres										
District & Local Centres	-323	-241	-154	-37	-13	-576	-431	-276	-67	-23
Out-of-Centre										
Out-of-Centre	-2,533	-2,382	-2,222	-2,005	-1,960	-4,524	-4,254	-3,967	-3,580	####
CITY OF WOLVERHAMPTON COUNCIL AREA	-3,351	-2,977	-2,579	-2,043	-1,930	-5,984	-5,317	-4,605	-3,648	####

Appendix 5B: Convenience Goods Capacity: Dudley

MBC

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Dudley	Strategic Centre	Brierley Hill- Traditional High Street	0%	£38.8	£39.0	£39.7	£40.6	£41.6	£41.8
		Brierley Hill- Merry Hill	0%	£45.7	£45.8	£46.7	£47.7	£48.9	£49.2
	Town Centre	Dudley	0%	£30.7	£30.8	£31.3	£32.1	£32.9	£33.0
		Stourbridge	0%	£117.0	£117.5	£119.6	£122.3	£125.4	£126.0
		Halesowen	0%	£62.7	£62.9	£64.1	£65.5	£67.2	£67.5
	District & Local Centres	0%	£166.2	£166.8	£169.8	£173.7	£178.1	£179.0	
	Out-of-Centre	0%	£326.2	£327.5	£333.4	£341.0	£349.5	£351.3	
	Dudley MBC Area			£787.3	£790.3	£804.7	£822.9	£843.6	£847.9

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] Dudley-Town Centre	P18/0590	Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1a); non-residential institution uses (D1); car showroom (sui generis) taxi rank; public space; highways, access and pedestrian connectivity works; car parking; landscaping; associated works (outline, all matters reserved)	2,322	1,625	8,000	£13.0	£13.0	£13.1	£13.3	£13.5	£13.6
[2] Lye-Out-of-Centre	P15/0845	Former Clarkson Place Unit, Thorns Road, Lye, DY5 2LD; Erection of retail store (A1) with associated car parking and landscaping.	1,738	1,003	11,000	£11.0	£11.0	£11.2	£11.3	£11.5	£11.5
[3] Dudley-Out-of-Centre	P20/1428	Unit 10 Castle Mill Works: change of use from B2/B8 to Members Retail Warehouse Club	1,977	1,143	5,500	£6.3	£6.3	£6.4	£6.5	£6.5	£6.6
[4] Kingswinford-Out-of-Centre	P19/0352	Former petrol filling station, Stream Rd, Kingswinford; Erection of a new convenience store and associated parking	345	233	10,000	£2.3	£2.3	£2.4	£2.4	£2.4	£2.4
[5] Gornal-Town Centre	P21/1233	Land at, Zoar Street, Lower Gornal, DY3 2PA. Demolition of 23 & 25 (Eggingtons Chemist) Abbey Road and 7, 8 & 9 Zoar Street	1,786	1,052	11,000	£11.6	£11.6	£11.7	£11.9	£12.1	£12.1
[6] Lye-Out-of-Centre	P21/1626	Top Bell Public House, Belmont Road, Lye, Stourbridge, DY9 8AS. Change of use and extension of public house (sui generis) to a convenience store	474	207	11,000	£2.3	£2.3	£2.3	£2.3	£2.4	£2.4
[7] Netherton-Out-of-Centre	P22/1614	The Crown (Proposed Redevelopment), Simms Lane, Netherton, Dudley, DY2 0PQ. Demolition of the vacant former public house and the redevelopment of the site for a Class E convenience foodstore and two Class E non-food retail units, together with associated access, parking, servicing arrangements and landscaping.	370	254	8,000	£2.0	£2.0	£2.1	£2.1	£2.1	£2.1
[8] Sedgley-Town Centre	P22/0650	Land South of, Bilston Street, Sedgley, Dudley. Demolition of existing buildings and structures and erection of a Food Retail St	1,839	1,003	11,000	£11.0	£11.0	£11.2	£11.3	£11.5	£11.5
TOTAL			10,851	6,520		£59.6	£59.6	£60.2	£61.1	£62.1	£62.2

- Notes:
- [1] A1 shops (food), maximum 2,322 sqm, netted down by 70%.
 - [2] Built-out, Council states 1,738 sq m of gross A1 retail floorspace and some 1,254 sq m net. The net floorspace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
 - [3] Built-out, Unit 10 Castle Mill Works: change of use from B2/B8 to Members Retail Warehouse Club. Dudley Council has provided a gross retail area of 1,977 sqm and net retail floorspace area of some 1,143 sqm.
 - [4] Under construction, Erection of a new convenience store and associated parking. Dudley Council has provided a gross retail area of 345 sqm and a net retail floorspace area of some 233 sqm.
 - [5] A1s application, as per planning and retail statement Gross Area of 1,786sqm with a net sales area of 1,315 sqm net of which 1,052 sqm net (80%) is for convenience goods and 263 sqm net (20%) is for comparison goods.
 - [6] Built-out, Council states 474 sq m of gross convenience goods retail floorspace netted down to 207 sq m net - Occupied Tesco Express store.
 - [7] One Stop application, as per planning and retail statement Gross Area of 370 with a net sales area of 254 sqm net (all assumed for convenience goods). Non-food units total 162 sqm gross netted down to 113sqm net (based a gross to net ratio of 70%).
 - [8] A1s application, as per planning and retail statement Gross Area of 1,839 sqm with a net sales area of 1,254 sqm net of which 1,003 sqm net (80%) is for convenience goods and 251 sqm net (20%) is for comparison goods.

TABLE 3: DUDLEY MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£787.3	£790.3	£804.7	£822.9	£843.6	£847.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£787.3	£787.3	£796.0	£808.0	£820.2	£822.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£3.0	£8.7	£14.9	£23.4	£25.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£59.6	£60.2	£61.1	£62.1	£62.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£56.5	-£51.6	-£46.3	-£38.7	-£37.0
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-4,523	-4,079	-3,606	-2,968	-2,835
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-6,462	-5,827	-5,151	-4,241	-4,049
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-8,077	-7,284	-6,439	-5,301	-5,062
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-	-11,539	-10,406	-9,198	-7,573	-7,231

- Notes:
- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 - STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 - STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 - STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 - STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 - STEP 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 4: DUDLEY MBC AREA STRATEGIC CENTRE: BRIERLEY HILL (Incorporating Traditional High St+ Merry Hill) - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£84.5	£84.8	£86.4	£88.3	£90.5	£91.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£84.5	£84.5	£85.4	£86.7	£88.0	£88.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.9	£1.6	£2.5	£2.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.3	£0.9	£1.6	£2.5	£2.7
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	26	74	124	193	207
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		37	105	178	276	296
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	46	132	222	344	370
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		66	188	318	492	529

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 5: DUDLEY MBC AREA : TOWN CENTRE: DUDLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£30.7	£30.8	£31.3	£32.1	£32.9	£33.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£30.7	£30.7	£31.0	£31.5	£31.9	£32.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.3	£0.6	£0.9	£1.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£13.0	£13.1	£13.3	£13.5	£13.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£12.9	-£12.8	-£12.8	-£12.6	-£12.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-1,031	-1,014	-995	-970	-965
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,473	-1,448	-1,422	-1,386	-1,379
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-1,841	-1,810	-1,777	-1,733	-1,723
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,630	-2,586	-2,538	-2,475	-2,462

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 6: DUDLEY MBC AREA : TOWN CENTRE: STOURBRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£117.0	£117.5	£119.6	£122.3	£125.4	£126.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£117.0	£117.0	£118.3	£120.1	£121.9	£122.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£1.3	£2.2	£3.5	£3.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.4	£1.3	£2.2	£3.5	£3.7
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	36	102	172	267	287
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		51	146	246	382	410
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	64	162	308	477	512
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		92	260	440	681	732

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 7: DUDLEY MBC AREA : TOWN CENTRE: HALESOWEN - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£62.7	£62.9	£64.1	£65.5	£67.2	£67.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£62.7	£62.7	£63.4	£64.4	£65.3	£65.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.7	£1.2	£1.9	£2.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.7	£1.2	£1.9	£2.0
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	19	55	92	143	154
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		28	78	132	204	220
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	34	98	165	256	275
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		49	139	236	365	392

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 8: DUDLEY MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£166.2	£166.8	£169.8	£173.7	£178.1	£179.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£166.2	£166.2	£168.0	£170.5	£173.1	£173.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.6	£1.8	£3.1	£4.9	£5.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£22.6	£22.9	£23.2	£23.5	£23.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£22.0	-£21.0	-£20.1	-£18.6	-£18.3
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-1,157	-1,664	-1,664	-1,429	-1,401
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,510	-2,376	-2,234	-2,042	-2,001
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-3,138	-2,971	-2,192	-2,552	-2,802
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-4,483	-4,244	-3,989	-3,646	-3,574

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 9: DUDLEY MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£326.2	£327.5	£333.4	£341.0	£349.5	£351.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£326.2	£326.2	£329.8	£334.8	£339.9	£340.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.3	£3.6	£6.2	£9.7	£10.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£24.0	£24.2	£24.6	£25.0	£25.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£22.7	-£20.6	-£18.4	-£15.3	-£14.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-1,816	-1,632	-1,436	-1,172	-1,117
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,595	-2,332	-2,052	-1,674	-1,595
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-3,243	-2,915	-2,565	-2,093	-1,994
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-4,634	-4,164	-3,664	-2,990	-2,849

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 10: DUDLEY MBC AREA: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

CENTRE TYPE		STORE FORMAT									
		Foodstore Format (sqm net)					Local Supermarket / Deep Discounter Format (sqm net)				
		2026	2031	2036	2041	2042	2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£56.5	-£51.6	-£46.3	-£38.7	-£37.0	-£56.5	-£51.6	-£46.3	-£38.7	-£37.0
Strategic Centre	Brierley Hill (Traditional High St +Merry Hill)	26	74	124	193	207	46	132	222	344	370
Town Centre	Dudley	-1,031	-1,014	-995	-970	-965	-1,841	-1,810	-1,777	-1,733	-1,723
	Stourbridge	36	102	172	267	287	64	182	308	477	512
	Halesowen	19	55	92	143	154	34	98	165	256	275
District & Local Centres		-1,757	-1,664	-1,564	-1,429	-1,401	-3,138	-2,971	-2,792	-2,552	-2,502
Out-of-Centre		-1,816	-1,632	-1,436	-1,172	-1,117	-3,243	-2,915	-2,565	-2,093	-1,994
DUDLEY MBC AREA		-4,523	-4,079	-3,606	-2,968	-2,835	-8,077	-7,284	-6,439	-5,301	-5,062

**Appendix 5C: Convenience Goods Capacity:
Sandwell MBC**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Sandwell	Strategic Centre	West Bromwich	0%	£95.4	£95.7	£97.5	£99.7	£102.2	£102.7
	Town Centre	Blackheath	0%	£56.0	£56.2	£57.2	£58.5	£60.0	£60.3
		Cradley Heath	0%	£67.1	£67.3	£68.5	£70.1	£71.9	£72.2
		Great Bridge	0%	£94.8	£95.2	£96.9	£99.1	£101.6	£102.1
		Oldbury	0%	£58.0	£58.2	£59.3	£60.6	£62.1	£62.5
		Wednesbury	0%	£37.5	£37.6	£38.3	£39.2	£40.2	£40.4
		Cape Hill	0%	£66.7	£67.0	£68.2	£69.7	£71.5	£71.8
		Bearwood	0%	£35.1	£35.2	£35.8	£36.6	£37.6	£37.8
	District & Local Centres		0%	£102.1	£102.5	£104.4	£106.8	£109.4	£110.0
	Out-of-Centre		0%	£210.3	£211.1	£214.9	£219.8	£225.3	£226.4
Sandwell MBC Area				£822.9	£826.0	£841.0	£860.1	£881.7	£886.2

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] West Bromwich-Town Centre	DC/13/56479	3 Bull Street West Bromwich Ringway West Bromwich B70 6EU. mixed use development including retail, restaurant and five apartments.	300	210	4,000	£0.8	£0.8	£0.8	£0.9	£0.9	£0.9
[2] West Bromwich-Town Centre	DC/16/59740	Proposed mixed use development consisting of 4 No. ground floor commercial units with 49 No. apartments above with undercroft car parking to rear and cycle and refuse storage Car Park Victoria Street West Bromwich	295	103	4,000	£0.4	£0.4	£0.4	£0.4	£0.4	£0.4
[3] West Bromwich-Edge of Town Centre	DC/18/62210	Staples Limited Tildasley Street West Bromwich B70 9SJ. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and landscaping) to remove loading bay extension and replace with rear access ramp and new ramp to customer service entrance.	1,973	1,052	11,000	£11.6	£11.6	£11.7	£11.9	£12.1	£12.1
[4] Great Bridge-Town Centre	DC/15/58596	87 Whitehall road and land adjacent to West Bromwich, Great Bridge. 2 No. retail units with 2 No. two bedroom flats above and two storey building comprising of 8 No. two bedroom flats with associated parking.	150	105	4,000	£0.4	£0.4	£0.4	£0.4	£0.4	£0.4
[5] Wednesbury - Out-of-Centre	DC/15/57967	Jahal Supersave 90 Oxford Street Wednesbury WS10 0PY - replacement shop with five apartments above	203	180	4,000	£0.7	£0.7	£0.7	£0.7	£0.8	£0.8
[6] Smethwick Local Centre-Town Centre	DC/15/58733	Site Of 2 To 4 Cape Hill Smethwick. Proposed three storey development comprising of 3 No. retail units at ground floor and 6 No. 2 bed apartments at first and second floor.	202	141	4,000	£0.6	£0.6	£0.6	£0.6	£0.6	£0.6
[7] Wednesbury Town Centre	DC/20/64006	41 Lower High Street, Wednesbury, WS10 7AJ. Proposed change of use of the former Barclays Bank into a shop (Class A1) at ground floor and self-contained flats (Class C3) on first and second floors with external alterations to windows and doors.	207	145	4,000	£0.6	£0.6	£0.6	£0.6	£0.6	£0.6
[8] Out-of-Centre: Gorse Farm Road	DC/19/63758	The Red Admiral, 52 Gorse Farm Road, Great Barr; B43 5LR. Proposed demolition of existing public house and erection of 1 No. single storey retail building (Class A1) with associated car parking and plant area.	366	256	4,000	£1.0	£1.0	£1.0	£1.1	£1.1	£1.1
[9] Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16, Unity Walk, Tipton; DY4 8QL. Proposed change of use to shops (Class A1).	430	151	4,000	£0.6	£0.6	£0.6	£0.6	£0.6	£0.6
[10] Oldbury Town Centre	DC/19/63208	Former Perrott Arms, 2 Birmingham Road, Oldbury, B69 4ED. Proposed change of use and two storey rear extension to create 3 No. shops at ground floor and 2 No. one bedroom flats above.	205	72	4,000	£0.3	£0.3	£0.3	£0.3	£0.3	£0.3
[11] West Bromwich-Town Centre	DC/21/65782	9B Astle Park West Bromwich B70 8NS. Proposed change of use to retail (Class E(a)).	555	389	10,000	£3.9	£3.9	£3.9	£4.0	£4.0	£4.1
[12] Tipton Local Centre-Out-of-Centre	DC/18/62117	The Sportsman, St Marks Road, Tipton. Proposed re-development and extension of existing Public House to provide new Class A1 local food store along with associated car parking and servicing.	404	280	10,000	£2.8	£2.8	£2.8	£2.9	£2.9	£2.9
[13] Tipton Local Centre-Out-of-Centre	DC/21/66194	The Jolly Collier 29 Leabrook Road Tipton DY4 0DX. Proposed change of use of the former Jolly Collier Public House to a convenience store (Use Class E(a)) to include external alterations, extensions to side, front and rear, new car park layout, new bin store, cycle store, landscaping and other associated works.	484	339	10,000	£3.4	£3.4	£3.4	£3.5	£3.5	£3.5
[14] West Bromwich-Town Centre	DC/21/65989	Kings Cinema Kings Square West Bromwich. Proposed demolition of existing Kings Cinema with ground floor retail and basement storage and construction of 15 storey building consisting of ground floor retail units with first floor storage and 77 apartments with basement residential parking and second floor open-air podium garden as residential amenity area	972	322	10,000	£3.2	£3.2	£3.3	£3.3	£3.3	£3.4
[15] Cradley Heath Town Centre-Edge of Centre	DC/22/66899	217 Halesowen Road Cradley Heath B64 6JQ. Proposed change of use from bank to 2 No. retail units at ground floor with single storey side and rear extension.	497	348	10,000	£3.5	£3.5	£3.5	£3.6	£3.6	£3.6
[16] Oldbury Town Centre-Edge of Centre	DC/23/67955	Units 4 and 5 Oldbury Green Retail Park, Oldbury Ringway, Oldbury B69 3DD. Proposed amalgamation of units 4 and 5 with single storey rear extension, external alterations to rear and new glazed shop frontages.	1,858	1,040	11,000	£11.4	£11.4	£11.6	£11.7	£11.9	£12.0
TOTAL			9,101	5,132		£45.2	£45.2	£45.7	£46.4	£47.1	£47.3

Notes:

- Built-out. Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Built-out. Assumed gross to net ratio of 70% and that 50% of the floorspace is for A1 convenience goods and that 50% is for A3 uses.
- Built-out. Aldi application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorspace is for convenience good and that remainder 20% is for comparison goods.
- Built-out. Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Built-out. Council states 202 sq m of gross convenience goods retail floorspace netted down to 180 sq m net.
- Built-out. Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Built-out. Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Built-out. Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- Built-out. Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- Built-out. Assumed that all the floorspace is for convenience goods.
- Built-out. Council states 484 sq m of gross convenience goods retail floorspace netted down to 339 sq m net assuming a gross net ratio of 70%.
- Design & Access Statement indicates GIA of 972 sqm net of which NIA is 643 sqm net. It is assumed that of this net floorspace it will be split equally between convenience and comparison goods.
- Council states 497 sq m of gross convenience goods retail floorspace netted down to 348 sq m net assuming a gross net ratio of 70%.
- Aldi application, as per planning and retail statement Gross Area of 1,858sqm with a net sales area of 1,300sqm net of which 1,040 sqm net (80%) is for convenience goods and 260 sqm net (20%) is for comparison goods.

TABLE 3: SANDWELL MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£822.9	£826.0	£841.0	£860.1	£881.7	£886.2
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£822.9	£822.9	£832.0	£844.5	£857.3	£859.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£3.2	£9.1	£15.5	£24.5	£26.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£45.2	£45.7	£46.4	£47.1	£47.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£42.1	-£36.7	-£30.9	-£22.7	-£20.9
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-3,365	-2,901	-2,406	-1,740	-1,600
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-4,808	-4,144	-3,438	-2,486	-2,286
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-6,010	-5,181	-4,297	-3,108	-2,858
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-8,585	-7,401	-6,139	-4,440	-4,083

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 4: SANDWELL MBC AREA STRATEGIC CENTRE: WEST BROMWICH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£95.4	£95.7	£97.5	£99.7	£102.2	£102.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£95.4	£95.4	£96.4	£97.9	£99.4	£99.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£1.1	£1.8	£2.8	£3.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£19.9	£20.1	£20.4	£20.8	£20.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£19.6	-£19.1	-£18.6	-£17.9	-£17.8
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-1,585	-1,611	-1,454	-1,376	-1,360
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,235	-2,158	-2,076	-1,966	-1,943
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-2,794	-2,688	-2,596	-2,458	-2,429
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-3,991	-3,854	-3,708	-3,511	-3,470

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 5: SANDWELL MBC AREA : TOWN CENTRE: BLACKHEATH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£56.0	£56.2	£57.2	£58.5	£60.0	£60.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£56.0	£56.0	£56.6	£57.4	£58.3	£58.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.6	£1.1	£1.7	£1.8
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.6	£1.1	£1.7	£1.8
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	17	49	82	128	137
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		25	70	118	182	196
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	31	87	147	228	245
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		44	124	210	326	350

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 6: SANDWELL MBC AREA : TOWN CENTRE: CRADLEY HEATH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£67.1	£67.3	£68.5	£70.1	£71.9	£72.2
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£67.1	£67.1	£67.8	£68.8	£69.9	£70.1
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.7	£1.3	£2.0	£2.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£3.5	£3.5	£3.6	£3.6	£3.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£3.2	-£2.8	-£2.3	-£1.6	-£1.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-258	-220	-180	-125	-114
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-368	-314	-257	-179	-163
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-460	-393	-321	-224	-203
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-657	-561	-458	-320	-290

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 7: SANDWELL MBC AREA : TOWN CENTRE: GREAT BRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£94.8	£95.2	£96.9	£99.1	£101.6	£102.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£94.8	£94.8	£95.9	£97.3	£98.8	£99.1
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£1.0	£1.8	£2.8	£3.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.4	£0.4	£0.4	£0.4	£0.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.1	£0.6	£1.4	£2.4	£2.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-4	49	106	163	199
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-6	70	152	261	284
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-8	88	189	326	356
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-11	125	271	468	508

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 8: SANDWELL MBC AREA : TOWN CENTRE: OLDBURY - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£58.0	£58.2	£59.3	£60.6	£62.1	£62.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£58.0	£58.0	£58.6	£59.5	£60.4	£60.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.6	£1.1	£1.7	£1.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£11.7	£11.9	£12.0	£12.2	£12.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£11.5	-£11.2	-£10.9	-£10.5	-£10.4
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-920	-888	-853	-806	-796
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,315	-1,268	-1,218	-1,151	-1,137
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-1,643	-1,885	-1,823	-1,439	-1,421
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,348	-2,264	-2,175	-2,056	-2,030

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 9: SANDWELL MBC AREA : TOWN CENTRE: WEDNESBURY - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£37.5	£37.6	£38.3	£39.2	£40.2	£40.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£37.5	£37.5	£37.9	£38.5	£39.1	£39.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.4	£0.7	£1.1	£1.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.6	£0.6	£0.6	£0.6	£0.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-£0.4	-£0.2	£0.1	£0.5	£0.6	£0.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-35	-14	9	39	46
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-50	-20	13	56	65
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-62	-24	16	70	81
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-89	-35	23	100	116

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 10: SANDWELL MBC AREA : TOWN CENTRE: CAPE HILL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£66.7	£67.0	£68.2	£69.7	£71.5	£71.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£66.7	£66.7	£67.4	£68.5	£69.5	£69.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.7	£1.3	£2.0	£2.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	£0.3	£0.7	£1.3	£2.0	£2.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	21	58	98	152	164
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		29	83	140	218	234
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	37	104	175	272	292
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		52	148	251	388	417

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 11: SANDWELL MBC AREA : TOWN CENTRE: BEARWOOD - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£35.1	£35.2	£35.8	£36.6	£37.6	£37.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£35.1	£35.1	£35.4	£36.0	£36.5	£36.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.4	£0.7	£1.0	£1.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	£0.1	£0.4	£0.7	£1.0	£1.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	11	31	52	80	86
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		15	44	74	114	123
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	19	55	92	143	154
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		28	78	132	204	219

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budegens, etc.).

TABLE 12: SANDWELL MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£102.1	£102.5	£104.4	£106.8	£109.4	£110.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£102.1	£102.1	£103.3	£104.8	£106.4	£106.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£1.1	£1.9	£3.0	£3.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.2	£1.2	£1.2	£1.2	£1.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.8	-£0.1	£0.7	£1.8	£2.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-62	-4	57	140	157
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-89	-6	81	200	224
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-111	-8	102	249	280
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-158	-11	145	356	401

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 13: SANDWELL MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£210.3	£211.1	£214.9	£219.8	£225.3	£226.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£210.3	£210.3	£212.6	£215.8	£219.0	£219.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.8	£2.3	£4.0	£6.2	£6.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£7.9	£8.0	£8.1	£8.3	£8.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£7.1	-£5.7	-£4.2	-£2.0	-£1.6
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-570	-451	-325	-155	-119
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-814	-645	-464	-221	-170
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-1,018	-806	-580	-276	-212
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,454	-1,151	-829	-395	-304

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 14: SANDWELL MBC AREA: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

CENTRE TYPE		STORE FORMAT									
		Foodstore Format (sqm net)					Local Supermarket / Deep Discounter Format (sqm net)				
		2026	2031	2036	2041	2042	2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£42.1	-£36.7	-£30.9	-£22.7	-£20.9	-£42.1	-£36.7	-£30.9	-£22.7	-£20.9
Strategic Centre	West Bromwich	-1,565	-1,511	-1,454	-1,376	-1,360	-2,794	-2,698	-2,596	-2,458	-2,429
	Town Centre										
	Blackheath	17	49	82	128	137	31	87	147	228	245
	Cradley Heath	-258	-220	-180	-125	-114	-460	-393	-321	-224	-203
	Great Bridge	-4	49	106	183	199	-8	88	189	326	355
	Oldbury	-920	-888	-853	-806	-796	-1,643	-1,585	-1,523	-1,439	-1,421
	Wednesbury	-35	-14	9	39	46	-62	-24	16	70	81
	Cape Hill	21	58	98	152	164	37	104	175	272	292
	Bearwood	11	31	52	80	86	19	55	92	143	154
District & Local Centres		-62	-4	57	140	157	-111	-8	102	249	280
Out-of-Centre		-570	-451	-325	-155	-119	-1,018	-806	-580	-276	-212
SANDWELL MBC AREA		-3,365	-2,901	-2,406	-1,740	-1,600	-6,010	-5,181	-4,297	-3,108	-2,858

**Appendix 5D: Convenience Goods Capacity: Walsall
Council**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Walsall	Strategic Centre	Walsall	0%	£108.5	£108.9	£110.8	£113.4	£116.2	£116.8
	Town Centre	Bloxwich	0%	£46.6	£46.7	£47.6	£48.7	£49.9	£50.1
		Brownhills	0%	£67.8	£68.0	£69.3	£70.8	£72.6	£73.0
		Aldridge	0%	£64.7	£64.9	£66.1	£67.6	£69.3	£69.6
		Willenhall	0%	£65.3	£65.5	£66.7	£68.2	£70.0	£70.3
		Darlaston	0%	£45.7	£45.8	£46.7	£47.7	£48.9	£49.2
	District & Local Centres	0%	£38.3	£38.4	£39.1	£40.0	£41.0	£41.2	
Out-of-Centre	0%	£121.3	£121.7	£123.9	£126.8	£129.9	£130.6		
Walsall MBC Area				£557.9	£560.1	£570.2	£583.1	£597.8	£600.8

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] Willenhall Town Centre-In-Centre	18/0438	Proposed demolition of existing class A1 retail (Budgens) store. Erection of new class A1 retail store (Aldi) with associated amendments to access, car	1,831	195	11,000	£2.1	£2.1	£2.2	£2.2	£2.2	£2.2
[2] Birchills Local Centre	18/0460	15 Old Birchills, Walsall, WS2 8QH. Change of Use from A4 to A1 (Costcutter) with external installation of plant and machinery to accommodate internal refrigeration.	292	204	11,000	£2.2	£2.2	£2.3	£2.3	£2.3	£2.3
[3] Brownhills Town Centre	17/1629	Land Between 75-85 High Street, Brownhills. New 2.5 storey development of 3 commercial units and 3 x 1 bed flats	171	60	11,000	£0.7	£0.7	£0.7	£0.7	£0.7	£0.7
[4] Darlaston (Out-of-Centre)	18/1494	Demolition of existing petrol station and construction of new shop and forecourt to include 3 x new pump islands, canopy including parking	230	121	11,000	£1.3	£1.3	£1.3	£1.4	£1.4	£1.4
[5] Walsall Wood (Out-of-Centre)	22/0548	Horse And Jockey, 146, Walsall Road, Walsall Wood, Walsall, WS9 9AJ. Erection of a new discount food store (Use Class E) with access, car parking, landscaping, biodiversity improvements and other associated works.	2,215	1,129	11,000	£12.4	£12.4	£12.6	£12.7	£12.9	£13.0
[6] Delves (Out-of-centre)	19/0622	Johal Supermarket, 19, West Bromwich Road, Walsall, WS1 3HS. Demolition of existing buildings and creation of 3 x retail (E (a)) units at ground floor and 5 x residential flats (G3) at first floor.	412	224	5,500	£1.2	£1.2	£1.2	£1.3	£1.3	£1.3
TOTAL			5,151	1,933		£20.0	£20.0	£20.2	£20.6	£20.9	£20.9

Notes:

- [1] Built-out, the net additional floorpace proposed is 278sqm gross (Existing: 1,553 sqm and proposed 1,831 sqm); the applied gross to net ratio of 70% and that all of this space is for convenience goods.
- [2] Built-out, assumed gross to net ratio of 70% and that all the floorpace is for convenience goods.
- [3] Assumed gross to net ratio of 70% and that 50% of the floorpace is for convenience goods and that 50% is for comparison goods.
- [4] Built-out, Council has stated that net new convenience goods space amounts to 121 sqm.
- [5] Lidl application, as per planning and retail statement gross floorpace of 2,215sqm. Of which the total net sales area is 1,411 sqm. Of this total, the convenience goods net sales area is 1,129sqm (80%) and comparison goods 282 sqm net (20%).
- [6] Council data states 412 sq m of gross new net additional retail floorpace. It is estimated that from this some 224 sqm net is for convenience goods and some 90sq m net for comparison goods.

TABLE 3: WALSALL MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£557.9	£560.1	£570.2	£583.1	£597.8	£600.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£557.9	£557.9	£564.1	£572.6	£581.2	£583.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£2.1	£6.1	£10.5	£16.6	£17.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£20.0	£20.2	£20.6	£20.9	£20.9
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£17.9	-£14.1	-£10.0	-£4.3	-£3.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorpace Capacity (sq m):	-	-1,431	-1,116	-780	-329	-234
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-2,044	-1,594	-1,115	-470	-334
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorpace Capacity (sq m):	-	-2,555	-1,993	-1,394	-587	-418
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-3,649	-2,846	-1,991	-839	-597

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 4: WALSALL MBC AREA STRATEGIC CENTRE: WALSALL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£108.5	£108.9	£110.8	£113.4	£116.2	£116.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£108.5	£108.5	£109.7	£111.3	£113.0	£113.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£1.2	£2.0	£3.2	£3.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.4	£1.2	£2.0	£3.2	£3.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	33	95	160	248	266
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		48	135	228	354	380
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	60	169	285	442	475
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		85	241	408	631	679

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 5: WALSALL MBC AREA : TOWN CENTRE: BLOXWICH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£46.6	£46.7	£47.6	£48.7	£49.9	£50.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£46.6	£46.6	£47.1	£47.8	£48.5	£48.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.5	£0.9	£1.4	£1.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.5	£0.9	£1.4	£1.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	14	41	69	106	114
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		20	58	98	152	163
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	26	72	122	190	204
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		37	104	175	271	291

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: BROWNHILLS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£67.8	£68.0	£69.3	£70.8	£72.6	£73.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£67.8	£67.8	£68.5	£69.6	£70.6	£70.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.7	£1.3	£2.0	£2.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.7	£0.7	£0.7	£0.7	£0.7
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.4	£0.1	£0.6	£1.3	£1.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-32	7	47	102	114
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-45	9	68	146	162
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-87	12	84	182	203
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-81	17	121	261	290

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: ALDRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£64.7	£64.9	£66.1	£67.6	£69.3	£69.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£64.7	£64.7	£65.4	£66.4	£67.4	£67.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.7	£1.2	£1.9	£2.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.7	£1.2	£1.9	£2.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	20	56	95	143	155
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		28	81	136	211	227
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	36	101	170	264	283
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		51	144	243	376	404

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 7: WALSALL MBC AREA : TOWN CENTRE: WILLENHALL- CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£65.3	£65.5	£66.7	£68.2	£70.0	£70.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£65.3	£65.3	£66.0	£67.0	£68.0	£68.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.3	£0.7	£1.2	£1.9	£2.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£2.1	£2.2	£2.2	£2.2	£2.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£1.9	-£1.4	-£1.0	-£0.3	-£0.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-161	-114	-75	-22	-11
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-216	-163	-107	-32	-16
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-270	-204	-134	-40	-20
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-386	-292	-192	-57	-28

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 8: WALSALL MBC AREA : TOWN CENTRE: DARLSTON CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£45.7	£45.8	£46.7	£47.7	£48.9	£49.2
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£45.7	£45.7	£46.2	£46.9	£47.6	£47.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.5	£0.9	£1.4	£1.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.5	£0.9	£1.4	£1.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	14	40	67	104	112
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		20	57	96	149	160
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	25	71	120	186	200
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		36	102	172	266	286

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 9: WALSALL MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£38.3	£38.4	£39.1	£40.0	£41.0	£41.2
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£38.3	£38.3	£38.7	£39.3	£39.8	£40.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.4	£0.7	£1.1	£1.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£2.2	£2.3	£2.3	£2.3	£2.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£2.1	-£1.9	-£1.6	-£1.2	-£1.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-168	-147	-124	-93	-86
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-240	-209	-176	-132	-123
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-300	-262	-221	-165	-154
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-429	-374	-315	-236	-220

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 10: WALSALL MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£121.3	£121.7	£123.9	£126.8	£129.9	£130.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£121.3	£121.3	£122.6	£124.5	£126.3	£126.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.5	£1.3	£2.3	£3.6	£3.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£15.0	£15.1	£15.4	£15.6	£15.7
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£14.5	-£13.8	-£13.1	-£12.0	-£11.8
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,500	£12,638	£12,829	£13,022	£13,061
(ii) Net Floorspace Capacity (sq m):	-	-1,161	-1,093	-1,020	-922	-901
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,659	-1,561	-1,457	-1,317	-1,287
STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£7,000	£7,077	£7,184	£7,293	£7,314
(ii) Net Floorspace Capacity (sq m):	-	-2,074	-1,951	-1,821	-1,646	-1,609
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,962	-2,788	-2,602	-2,351	-2,299

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 9: WALSALL MBC AREA : SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

CENTRE TYPE	STORE FORMAT	STORE FORMAT									
		Foodstore Format (sqm net)					Local Supermarket / Deep Discounter Format (sqm net)				
		2026	2031	2036	2041	2042	2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£17.9	-£14.1	-£10.0	-£4.3	-£3.1	-£17.9	-£14.1	-£10.0	-£4.3	-£3.1
Strategic Centre	Walsall	33	95	160	248	266	60	169	285	442	475
Town Centre	Bloxwich	14	41	69	106	114	26	72	122	190	204
	Brownhills	-32	7	47	102	114	-57	12	84	182	203
	Aldridge	20	56	95	148	159	36	101	170	264	283
	Willenhall	-151	-114	-75	-22	-11	-270	-204	-134	-40	-20
	Darlaston	14	40	67	104	112	25	71	120	186	200
District & Local Centres		-168	-147	-124	-93	-86	-300	-262	-221	-165	-154
Out-of-Centre		-1,161	-1,093	-1,020	-922	-901	-2,074	-1,951	-1,821	-1,646	-1,609
WALSALL MBC AREA		-1,431	-1,116	-780	-329	-234	-2,555	-1,993	-1,394	-587	-418

**Appendix 6: Population and Expenditure:
Comparison Goods**

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2024) POPULATION & PROJECTIONS (to 2042) GROWTH 2024 to 2042 (%)

ZONE:	2024	2026	2031	2036	2041	2042	2024-2031	2024-2036	2024-2042
Zone 1	74,761	75,340	76,816	78,638	80,464	80,817	2.7%	5.2%	8.1%
Zone 2	130,573	131,466	133,987	136,397	138,639	139,103	2.6%	4.5%	6.5%
Zone 3	76,316	76,756	78,048	79,023	79,872	80,003	2.3%	3.5%	4.8%
Zone 4	92,169	92,725	94,205	95,747	97,141	97,368	2.2%	3.9%	5.6%
Zone 5	40,272	40,542	41,135	41,703	42,168	42,266	2.1%	3.6%	5.0%
Zone 6	38,731	39,064	39,992	40,646	41,231	41,341	3.3%	4.9%	6.7%
Zone 7	30,612	30,838	31,235	31,600	31,980	32,037	2.0%	3.2%	4.7%
Zone 8	55,810	56,739	58,918	60,859	62,914	63,324	5.6%	9.0%	13.5%
Zone 9	25,798	25,982	26,473	26,907	27,323	27,403	2.6%	4.3%	6.2%
Zone 10	37,641	37,927	38,532	39,210	39,958	40,117	2.4%	4.2%	6.6%
Zone 11	19,344	19,479	19,872	20,202	20,619	20,704	2.7%	4.4%	7.0%
Zone 12	25,319	25,478	25,815	26,127	26,502	26,584	2.0%	3.2%	5.0%
Zone 13	26,748	27,137	28,065	29,044	30,191	30,435	4.9%	8.6%	13.8%
Zone 14	66,202	66,816	68,049	69,417	70,653	70,930	2.8%	4.9%	7.1%
Zone 15	32,211	32,517	33,328	34,143	35,052	35,219	3.5%	6.0%	9.3%
Zone 16	34,526	34,836	35,700	36,682	37,768	37,980	3.4%	6.2%	10.0%
Zone 17	34,025	34,280	34,895	35,631	36,474	36,640	2.6%	4.7%	7.7%
Zone 18	56,578	56,625	56,893	57,159	57,129	57,072	0.6%	1.0%	0.9%
Zone 19	35,789	36,131	37,095	38,199	39,537	39,856	3.6%	6.7%	11.4%
Zone 20	71,259	72,029	73,906	75,615	77,559	77,980	3.7%	6.1%	9.4%
Zone 21	37,291	37,748	38,858	40,124	41,590	41,931	4.2%	7.6%	12.4%
Zone 22	35,609	35,770	36,240	36,706	37,208	37,268	1.8%	3.1%	4.7%
Zone 23	48,101	48,505	49,607	50,771	52,150	52,432	3.1%	5.6%	9.0%
Zone 24	43,889	44,282	45,211	46,298	47,582	47,862	3.0%	5.5%	9.1%
Zone 25	29,305	29,434	29,691	29,878	30,097	30,092	1.3%	2.0%	2.7%
Zone 26	8,071	8,082	8,069	8,109	8,134	8,133	0.0%	0.5%	0.8%
Zone 27	52,424	52,786	53,551	54,267	55,007	55,149	2.1%	3.5%	5.2%
Zone 28	32,264	32,559	33,199	33,872	34,698	34,850	2.9%	5.0%	8.0%
Zone 29	16,128	16,226	16,474	16,688	16,946	17,006	2.1%	3.5%	5.4%
Zone 30	28,899	29,310	30,460	31,845	33,317	33,641	5.4%	10.2%	16.4%
Zone 31	43,142	43,769	45,441	47,141	49,014	49,411	5.3%	9.3%	14.5%
Zone 32	51,627	52,199	53,664	55,225	56,923	57,239	3.9%	7.0%	10.9%
Zone 33	83,417	84,417	86,669	89,012	91,541	92,062	3.9%	6.7%	10.4%
Zone 34	48,626	48,945	49,772	50,730	51,829	52,082	2.4%	4.3%	7.1%
Zone 35	55,045	55,636	56,963	58,212	59,576	59,825	3.5%	5.8%	8.7%
Zone 36	18,126	18,338	18,672	19,000	19,371	19,431	3.0%	4.8%	7.2%
Zone 37	22,389	22,569	23,136	23,707	24,269	24,386	3.3%	5.9%	8.9%
Zone 38	17,335	17,478	17,748	18,018	18,328	18,398	2.4%	3.9%	6.1%
Zone 39	30,203	30,347	30,737	31,089	31,557	31,638	1.8%	2.9%	4.8%
Zone 40	16,891	17,082	17,454	17,788	18,196	18,264	3.3%	5.3%	8.1%
Zone 41	27,055	27,177	27,477	27,683	27,820	27,834	1.6%	2.3%	2.9%
Zone 42	17,482	17,683	18,113	18,611	19,142	19,234	3.6%	6.5%	10.0%
Zone 43	63,468	64,147	65,788	67,605	69,656	70,065	3.7%	6.5%	10.4%
Zone 44	36,628	36,863	37,446	37,862	38,289	38,361	2.2%	3.4%	4.7%
Zone 45	26,012	26,267	26,754	27,228	27,655	27,743	2.9%	4.7%	6.7%
Zone 46	22,823	23,101	23,784	24,427	25,152	25,296	4.2%	7.0%	10.8%
Zone 47	52,294	52,832	54,130	55,447	56,893	57,192	3.5%	6.0%	9.4%
Zone 48	13,273	13,533	14,114	14,679	15,220	15,311	6.3%	10.6%	15.4%
Zone 49	20,689	20,944	21,554	22,204	22,909	23,073	4.2%	7.3%	11.5%
Zone 50	64,116	64,616	65,937	67,210	68,360	68,590	2.8%	4.8%	7.0%
Zone 51	35,032	35,338	35,918	36,402	36,906	37,008	2.5%	3.9%	5.6%
Zone 52	15,754	15,841	16,005	16,171	16,388	16,433	1.6%	2.6%	4.3%
Zone 53	16,897	17,057	17,478	17,839	18,198	18,273	3.4%	5.6%	8.1%
Zone 54	30,566	30,790	31,419	31,913	32,441	32,536	2.8%	4.4%	6.4%
Zone 55	27,983	28,418	29,294	30,020	30,587	30,685	4.7%	7.3%	9.7%
Study Area	2,193,538	2,212,796	2,259,786	2,306,730	2,356,123	2,365,913	3.0%	5.2%	7.9%

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2024) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2024	2026	2031	2036	2041	2042	
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
EXPERIAN - SPECIAL FORMS OF TRADING (%):	24.3%	26.0%	28.1%	29.3%	29.7%	29.7%	
REVISED SPECIAL FORMS OF TRADING (%):	25.1%	26.8%	29.0%	30.2%	30.6%	30.6%	
Zone 1	£3,715	£2,784	£2,879	£3,245	£3,660	£4,177	£4,294
Zone 2	£3,018	£2,262	£2,339	£2,636	£2,974	£3,394	£3,489
Zone 3	£3,352	£2,512	£2,597	£2,928	£3,302	£3,769	£3,875
Zone 4	£3,554	£2,664	£2,754	£3,104	£3,502	£3,997	£4,109
Zone 5	£3,293	£2,468	£2,552	£2,877	£3,245	£3,703	£3,807
Zone 6	£3,869	£2,900	£2,999	£3,380	£3,813	£4,351	£4,473
Zone 7	£3,574	£2,679	£2,770	£3,122	£3,522	£4,019	£4,132
Zone 8	£4,274	£3,203	£3,313	£3,734	£4,212	£4,807	£4,941
Zone 9	£3,815	£2,859	£2,956	£3,332	£3,759	£4,290	£4,410
Zone 10	£3,623	£2,715	£2,808	£3,165	£3,570	£4,074	£4,188
Zone 11	£3,152	£2,362	£2,443	£2,753	£3,106	£3,544	£3,644
Zone 12	£3,221	£2,414	£2,496	£2,813	£3,173	£3,622	£3,723
Zone 13	£2,729	£2,045	£2,115	£2,383	£2,689	£3,069	£3,154
Zone 14	£3,048	£2,284	£2,362	£2,662	£3,003	£3,427	£3,523
Zone 15	£3,060	£2,293	£2,371	£2,673	£3,015	£3,441	£3,538
Zone 16	£2,676	£2,006	£2,074	£2,338	£2,637	£3,009	£3,094
Zone 17	£2,968	£2,225	£2,300	£2,593	£2,925	£3,338	£3,432
Zone 18	£4,476	£3,354	£3,469	£3,910	£4,410	£5,034	£5,175
Zone 19	£3,313	£2,483	£2,568	£2,894	£3,265	£3,726	£3,830
Zone 20	£3,790	£2,840	£2,937	£3,311	£3,735	£4,262	£4,382
Zone 21	£3,029	£2,270	£2,347	£2,645	£2,984	£3,406	£3,501
Zone 22	£3,631	£2,722	£2,814	£3,172	£3,578	£4,084	£4,198
Zone 23	£2,933	£2,198	£2,273	£2,562	£2,890	£3,298	£3,391
Zone 24	£3,398	£2,547	£2,634	£2,968	£3,349	£3,822	£3,929
Zone 25	£3,950	£2,960	£3,061	£3,450	£3,892	£4,442	£4,566
Zone 26	£5,066	£3,796	£3,926	£4,425	£4,991	£5,697	£5,856
Zone 27	£3,998	£2,996	£3,099	£3,493	£3,940	£4,496	£4,622
Zone 28	£4,088	£3,064	£3,168	£3,571	£4,028	£4,597	£4,726
Zone 29	£4,358	£3,266	£3,377	£3,806	£4,294	£4,900	£5,038
Zone 30	£3,084	£2,311	£2,390	£2,694	£3,039	£3,468	£3,565
Zone 31	£2,875	£2,154	£2,228	£2,511	£2,833	£3,233	£3,323
Zone 32	£2,831	£2,122	£2,194	£2,473	£2,789	£3,183	£3,273
Zone 33	£3,773	£2,827	£2,924	£3,296	£3,718	£4,243	£4,362
Zone 34	£4,469	£3,349	£3,464	£3,904	£4,404	£5,026	£5,167
Zone 35	£3,112	£2,332	£2,411	£2,718	£3,066	£3,499	£3,597
Zone 36	£3,566	£2,673	£2,764	£3,115	£3,514	£4,011	£4,123
Zone 37	£3,462	£2,595	£2,683	£3,024	£3,412	£3,894	£4,003
Zone 38	£3,652	£2,737	£2,830	£3,190	£3,598	£4,106	£4,221
Zone 39	£3,795	£2,844	£2,941	£3,315	£3,739	£4,268	£4,387
Zone 40	£3,410	£2,555	£2,642	£2,978	£3,360	£3,835	£3,942
Zone 41	£3,950	£2,960	£3,061	£3,450	£3,892	£4,442	£4,566
Zone 42	£3,100	£2,323	£2,403	£2,708	£3,055	£3,486	£3,584
Zone 43	£3,146	£2,358	£2,438	£2,748	£3,100	£3,538	£3,637
Zone 44	£3,363	£2,520	£2,606	£2,938	£3,314	£3,782	£3,888
Zone 45	£3,309	£2,480	£2,565	£2,891	£3,261	£3,722	£3,826
Zone 46	£3,083	£2,311	£2,389	£2,693	£3,038	£3,467	£3,564
Zone 47	£3,076	£2,306	£2,384	£2,687	£3,031	£3,460	£3,556
Zone 48	£4,478	£3,356	£3,470	£3,911	£4,412	£5,036	£5,177
Zone 49	£2,798	£2,097	£2,169	£2,444	£2,757	£3,147	£3,235
Zone 50	£3,689	£2,764	£2,859	£3,222	£3,635	£4,148	£4,264
Zone 51	£3,475	£2,604	£2,693	£3,035	£3,424	£3,908	£4,017
Zone 52	£4,329	£3,244	£3,355	£3,781	£4,266	£4,868	£5,004
Zone 53	£4,353	£3,262	£3,373	£3,802	£4,289	£4,895	£5,032
Zone 54	£4,044	£3,031	£3,134	£3,533	£3,985	£4,548	£4,675
Zone 55	£4,309	£3,229	£3,339	£3,764	£4,246	£4,846	£4,981
STUDY AREA AVERAGE:	£3,555	£2,664	£2,755	£3,105	£3,503	£3,997	£4,109

Source: Average spend per capita estimates (2022 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 21 published by Experian Business Strategies (February 2024).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 21 (February 2024).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2024) TO 2042 (£m) GROWTH 2024 to 2042 (%)

	2024	2024	2026	2031	2036	2041	2042	2024-	2024-2036	2024-
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING						2031		2042
Zone 1	277.7	208.1	216.9	249.2	287.8	336.1	347.0	19.8%	38.3%	66.8%
Zone 2	394.1	295.3	307.5	353.2	405.6	470.5	485.3	19.6%	37.3%	64.3%
Zone 3	255.8	191.7	199.4	228.5	261.0	301.0	310.0	19.2%	36.1%	61.7%
Zone 4	327.6	245.5	255.4	292.5	335.3	388.3	400.1	19.1%	36.6%	63.0%
Zone 5	132.6	99.4	103.5	118.3	135.3	156.2	160.9	19.1%	36.2%	61.9%
Zone 6	149.9	112.3	117.1	135.2	155.0	179.4	184.9	20.4%	38.0%	64.7%
Zone 7	109.4	82.0	85.4	97.5	111.3	128.5	132.4	18.9%	35.7%	61.4%
Zone 8	238.6	178.8	187.9	220.0	256.3	302.4	312.9	23.0%	43.4%	75.0%
Zone 9	98.4	73.8	76.8	88.2	101.1	117.2	120.9	19.6%	37.1%	63.9%
Zone 10	136.4	102.2	106.5	121.9	140.0	162.8	168.0	19.3%	37.0%	64.4%
Zone 11	61.0	45.7	47.6	54.7	62.7	73.1	75.4	19.7%	37.3%	65.1%
Zone 12	81.5	61.1	63.6	72.6	82.9	96.0	99.0	18.8%	35.7%	62.0%
Zone 13	73.0	54.7	57.4	66.9	78.1	92.6	96.0	22.3%	42.8%	75.5%
Zone 14	201.8	151.2	157.8	181.2	208.5	242.2	249.9	19.8%	37.9%	65.3%
Zone 15	98.6	73.9	77.1	89.1	103.0	120.6	124.6	20.6%	39.4%	68.7%
Zone 16	92.4	69.2	72.2	83.5	96.7	113.7	117.5	20.5%	39.7%	69.7%
Zone 17	101.0	75.7	78.9	90.5	104.2	121.8	125.7	19.5%	37.7%	66.1%
Zone 18	253.2	189.8	196.4	222.4	252.1	287.6	295.3	17.2%	32.8%	55.6%
Zone 19	118.6	88.9	92.8	107.4	124.7	147.3	152.7	20.8%	40.3%	71.8%
Zone 20	270.1	202.4	211.6	244.7	282.4	330.6	341.7	20.9%	39.5%	68.8%
Zone 21	112.9	84.6	88.6	102.8	119.7	141.7	146.8	21.5%	41.5%	73.5%
Zone 22	129.3	96.9	100.7	115.0	131.3	152.0	156.5	18.6%	35.5%	61.4%
Zone 23	141.1	105.7	110.3	127.1	146.7	172.0	177.8	20.2%	38.8%	68.1%
Zone 24	149.1	111.8	116.6	134.2	155.0	181.8	188.0	20.1%	38.7%	68.2%
Zone 25	115.7	86.7	90.1	102.4	116.3	133.7	137.4	18.1%	34.1%	58.4%
Zone 26	40.9	30.6	31.7	35.7	40.5	46.3	47.6	16.5%	32.1%	55.4%
Zone 27	209.6	157.1	163.6	187.0	213.8	247.3	254.9	19.1%	36.1%	62.3%
Zone 28	131.9	98.8	103.2	118.6	136.4	159.5	164.7	19.9%	38.0%	66.6%
Zone 29	70.3	52.7	54.8	62.7	71.7	83.0	85.7	19.1%	36.0%	62.7%
Zone 30	89.1	66.8	70.1	82.1	96.8	115.5	119.9	22.9%	44.9%	79.6%
Zone 31	124.0	92.9	97.5	114.1	133.5	158.5	164.2	22.8%	43.7%	76.7%
Zone 32	146.1	109.5	114.5	132.7	154.0	181.2	187.3	21.2%	40.6%	71.0%
Zone 33	314.7	235.9	246.8	285.6	330.9	388.4	401.5	21.1%	40.3%	70.2%
Zone 34	217.3	162.9	169.5	194.3	223.4	260.5	269.1	19.3%	37.2%	65.2%
Zone 35	171.3	128.4	134.2	154.8	178.5	208.5	215.2	20.6%	39.0%	67.7%
Zone 36	64.6	48.4	50.7	58.2	66.8	77.7	80.1	20.1%	37.8%	65.4%
Zone 37	77.5	58.1	60.6	70.0	80.9	94.5	97.6	20.4%	39.2%	68.0%
Zone 38	63.3	47.4	49.5	56.6	64.8	75.3	77.7	19.3%	36.7%	63.7%
Zone 39	114.6	85.9	89.2	101.9	116.3	134.7	138.8	18.6%	35.3%	61.6%
Zone 40	57.6	43.2	45.1	52.0	59.8	69.8	72.0	20.4%	38.5%	66.8%
Zone 41	106.9	80.1	83.2	94.8	107.7	123.6	127.1	18.4%	34.5%	58.7%
Zone 42	54.2	40.6	42.5	49.1	56.9	66.7	68.9	20.8%	40.0%	69.7%
Zone 43	199.7	149.6	156.4	180.8	209.6	246.4	254.8	20.8%	40.1%	70.3%
Zone 44	123.2	92.3	96.1	110.0	125.5	144.8	149.1	19.2%	35.9%	61.6%
Zone 45	86.1	64.5	67.4	77.3	88.8	102.9	106.1	19.9%	37.6%	64.5%
Zone 46	70.4	52.7	55.2	64.1	74.2	87.2	90.2	21.5%	40.7%	71.0%
Zone 47	160.9	120.6	126.0	145.5	168.1	196.8	203.4	20.6%	39.4%	68.7%
Zone 48	59.4	44.5	47.0	55.2	64.8	76.6	79.3	23.9%	45.4%	77.9%
Zone 49	57.9	43.4	45.4	52.7	61.2	72.1	74.6	21.4%	41.1%	72.0%
Zone 50	236.5	177.2	184.7	212.5	244.3	283.6	292.5	19.9%	37.8%	65.0%
Zone 51	121.7	91.2	95.2	109.0	124.6	144.2	148.7	19.5%	36.6%	63.0%
Zone 52	68.2	51.1	53.1	60.5	69.0	79.8	82.2	18.4%	35.0%	60.9%
Zone 53	73.5	55.1	57.5	66.5	76.5	89.1	92.0	20.6%	38.8%	66.8%
Zone 54	123.6	92.6	96.5	111.0	127.2	147.5	152.1	19.8%	37.3%	64.2%
Zone 55	120.6	90.4	94.9	110.3	127.5	148.2	152.8	22.0%	41.1%	69.2%
STUDY AREA:	7,675.5	5,752.2	5,999.8	6,904.3	7,947.0	9,259.4	9,557.1	20.0%	34.1%	61.0%

**Appendix 7: Comparison Goods Market Shares
(including SFT)**

TABLE 6: BOOKS, STATIONERY & DRAWING MATERIALS - 2024 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading
August 2019 measured Survey

Table with columns: LOCAL PLANNING AUTHORITY, CENTRE TYPE, and 44 numbered zones (Zone 1 to Zone 44). Rows are categorized by authority: Wolverhampton, Dudley, Sandwell, Walsall, and All Other Centres Outside BCUA Area. Each row lists specific strategic and town centres with their respective market share percentages for each zone. A final 'GRAND TOTAL' row is provided at the bottom.

Table with columns: COMB ZONES, Wolverhampton, Dudley, Sandwell, Walsall, and All Other Centres Outside BCUA Area. This table summarizes market share percentages for various combined zones across the different local planning authorities, providing a regional overview of the data.

**Appendix 8: Comparison Goods Turnover
(excluding SFT)**

TABLE 1: ALL COMPARISON GOODS - 2024 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading
Based on 2019 household survey

LOCAL PLANNING AUTHORITY / CENTRE TYPE	CENTRE TYPE																												TOTAL																																																																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Zone 24	Zone 25	Zone 26	Zone 27	Zone 28		Zone 29	Zone 30	Zone 31	Zone 32	Zone 33	Zone 34	Zone 35	Zone 36	Zone 37	Zone 38	Zone 39	Zone 40	Zone 41	Zone 42	Zone 43	Zone 44	Zone 45	Zone 46	Zone 47	Zone 48	Zone 49	Zone 50	Zone 51	Zone 52	Zone 53	Zone 54	Zone 55	Zone 56	Zone 57	Zone 58	Zone 59	Zone 60	Zone 61	Zone 62	Zone 63	Zone 64	Zone 65	Zone 66	Zone 67	Zone 68	Zone 69	Zone 70	Zone 71	Zone 72	Zone 73	Zone 74	Zone 75	Zone 76	Zone 77	Zone 78	Zone 79	Zone 80	Zone 81	Zone 82	Zone 83	Zone 84	Zone 85	Zone 86	Zone 87	Zone 88	Zone 89	Zone 90	Zone 91	Zone 92	Zone 93	Zone 94	Zone 95	Zone 96	Zone 97	Zone 98	Zone 99	Zone 100
Wolverhampton																																																																																																					
Strategic Centre																																																																																																					
Town Centre																																																																																																					
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**Appendix 9A: Comparison Goods Capacity:
City of Wolverhampton**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042
Wolverhampton								
Strategic Centre	Wolverhampton	5%	£486.0	£506.9	£583.3	£671.4	£782.3	£807.4
Town Centre	Bilston	0%	£66.1	£68.9	£79.3	£91.3	£106.4	£109.8
	Wednesfield	0%	£14.0	£14.6	£16.8	£19.3	£22.5	£23.3
District & Local Centres		0%	£30.8	£32.1	£36.9	£42.5	£49.5	£51.1
Out-of-Centre		0%	£193.6	£202.0	£232.4	£267.5	£311.7	£321.7
City of Wolverhampton Council Area			£790.5	£824.5	£948.8	£1,092.1	£1,272.4	£1,313.3

TABLE 2: COMMITTED COMPARISON FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] Blakenhall District Centre (Dudley Road)	18/00132/FUL	Community Centre: Proposed part change of use from Industrial building to form 4 Retail units.	314	55	2,000	£0.1	£0.1	£0.1	£0.2	£0.2	£0.2
[2] Wolverhampton - City Centre	19/00349/FUL	Installation of 697sqm mezzanine and elevational changes to Unit F. St Johns Retail Park Church Street City Centre Wolverhampton West Midlands WV2 4SJ	697	600	3,000	£1.8	£1.9	£2.2	£2.5	£2.8	£2.9
[3] Wolverhampton - City Centre	13/00871/FUL	Pountney Street, unit shops - Proposed change of use of the existing basement area to create a mixed use development comprising retail units, bar, restaurant, creche and indoor parking Basement Of Former J.W. Braithwaite Pountney Street Wolverhampton West Midlands WV2 4HX	1,098	384	3,000	£1.2	£1.2	£1.4	£1.6	£1.8	£1.9
[4] Wolverhampton - City Centre	16/00678/FUL	Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. Proposed new Food Retail Store (Use Class A1), with associated car parking, servicing and landscaping (amended proposal following earlier approval).	1,505	190	4,000	£0.8	£0.8	£0.9	£1.0	£1.2	£1.2
[5] Wolverhampton - City Centre	14/00310/FUL	Mander Centre reconfiguration	8,360	3,855	4,000	£15.4	£16.1	£18.5	£21.2	£24.3	£25.0
[6] Wolverhampton - City Centre	21/00402/FUL	Lidl - Former Quality Hotel Site, 126 Penn Road	1,926	236	4,000	£0.9	£1.0	£1.1	£1.3	£1.5	£1.5
[7] Chapel Ash Local Centre	22/00683/FUL	Former Wolverhampton And Midland Counties Eye Infirmary Compton Road Wolverhampton West Midlands WV3 9QR	516	181	4,000	£0.7	£0.8	£0.9	£1.0	£1.1	£1.2
[8] Whitmore Reans (Avion Centre)	23/01219/FUL	Former Bagot Arms PH Newhampton Road West WV6 0RX	607	136	4,000	£0.5	£0.6	£0.7	£0.7	£0.9	£0.9
[9] Blakenhall (Dudley Road)	24/00092/FUL	Shri Guru Ravidass Community Centre, 372 - 379 Dudley Road - creation of four retail units	430	58	4,000	£0.2	£0.2	£0.3	£0.3	£0.4	£0.4
TOTAL			15,453	5,695		£21.7	£22.6	£26.0	£29.8	£34.2	£35.2

Notes:

- [1] Built-out, Council states one comparison goods unit with a floorpace of 55sqm net.
- [2] Built-out, occupied. Permission provides for maximum 600sqm mezzanine net sales area.
- [3] One 120sqm unit built out, previously occupied by a comparison operator and now vacant. Assumed that of the total permitted floorpace of 1,098 sqm the convenience /comparison split will be 50% / 50% and netted down using a gross to net factor of 70%.
- [4] Built-out, occupied. 190sqm max sales area for comparison goods.
- [5] Built-out: Demolition of south western corner of Mander Centre fronting Bell Street, to be replaced by a new 8,360 sqm department store unit. Creation of larger retail units at ground floor, construction of a new retail kiosk fronting Woolpack Alley and refurbishment of existing mall. Council provided an uplift of 5,507 sqm gross. Applied gross to net ratio of 70% representing a net increase of 3,855 sqm net.
- [6] Lidl - Former Quality Hotel Site, 126 Penn Road (including 42 Oaklands Road And Business Centre) Wolverhampton WV3 0ER Demolition of existing buildings and erection of a Class E limited assortment discount foodstore with associated car parking, access, landscaping and engineering works. Council has detailed planning permission granted and s106 signed. Condition restricts convenience sales area to 943sqm net and comparison goods to 236 sqm net.
- [7] Partial redevelopment of the Former Eye Infirmary site, including demolition in a conservation area, the change of use of the old Eye Infirmary building for the provision of residential dwellings, a new stepped residential building with ground floor commercial space, the refurbishment of the existing Nurses Home and two storey extension for an Eating Disorder Clinic and development of SEN School building, car parking, landscaping and other associated works. Council has provided a gross retail area of 516 sqm and a net retail comparison floorpace area of some 181 sqm net.
- [8] Former Bagot Arms PH Newhampton Road West WV6 0RX - alterations and extensions to form eight retail units (Use Class E) at ground floor level and three one bedroom apartments at first floor level. Planning permission granted. Council has provided a gross retail area of 607 sqm and a net floorpace area of some 272 sqm net. Of this net floorpace it is assumed that it is split evenly between convenience (136sqm net) and comparison goods (136sqm net).
- [9] Shri Guru Ravidass Community Centre, 372 - 379 Dudley Road - creation of four retail units. Planning permission granted. Council has provided a gross retail area of 430sqm and a net floorpace area of some 116 sqm net. Of this net floorpace it is assumed that it is split evenly between convenience (58sqm net) and comparison goods (58sqm net).

TABLE 3: CITY OF WOLVERHAMPTON COUNCIL AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£790.5	£824.5	£948.8	£1,092.1	£1,272.4	£1,313.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£790.5	£824.8	£946.9	£1,087.1	£1,248.1	£1,283.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.3	£1.9	£5.0	£24.4	£30.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£22.6	£26.0	£29.8	£34.2	£35.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£22.9	-£24.1	-£24.9	-£9.9	-£4.9
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorpace Capacity (sq m):	-	-3,662	-3,353	-3,012	-1,044	-591
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-5,231	-4,791	-4,303	-1,491	-716

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: CITY OF WOLVERHAMPTON COUNCIL: STRATEGIC CENTRE: WOLVERHAMPTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£486.0	£506.9	£583.3	£671.4	£782.3	£807.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£486.0	£507.1	£582.2	£668.4	£767.3	£788.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.2	£1.2	£3.1	£15.0	£18.6
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£16.1	£18.5	£21.2	£24.3	£25.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£16.3	-£17.3	-£18.1	-£9.4	-£6.4
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-2,599	-2,409	-2,200	-989	-656
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-3,713	-3,442	-3,142	-1,413	-937

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: BILSTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£66.1	£68.9	£79.3	£91.3	£106.4	£109.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£66.1	£68.9	£79.1	£90.9	£104.3	£107.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.4	£2.0	£2.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.2	£0.4	£2.0	£2.5
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	22	59	215	260	215
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-6	31	72	307	372

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: WEDNESFIELD - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£14.0	£14.6	£16.8	£19.3	£22.5	£23.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£14.0	£14.6	£16.8	£19.3	£22.1	£22.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.1	£0.4	£0.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.0	£0.1	£0.4	£0.5
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-1	5	11	46	55
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1	7	15	65	79

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: CITY OF WOLVERHAMPTON COUNCIL: DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£30.8	£32.1	£36.9	£42.5	£49.5	£51.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£30.8	£32.1	£36.9	£42.3	£48.6	£49.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.9	£1.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.7	£1.9	£2.2	£2.5	£2.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£1.7	-£1.9	-£2.0	-£1.6	-£1.4
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-270	-258	-245	-168	-147
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-386	-369	-350	-240	-210

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: CITY OF WOLVERHAMPTON COUNCIL: OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£193.6	£202.0	£232.4	£267.5	£311.7	£321.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£193.6	£202.0	£232.0	£266.3	£305.7	£314.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£0.5	£1.2	£6.0	£7.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£4.9	£5.6	£6.4	£7.4	£7.6
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£4.9	-£5.1	-£5.2	-£1.4	-£0.1
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-788	-712	-639	-146	-14
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,125	-1,017	-898	-209	-19

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: SUMMARY TABLE: CITY OF WOLVERHAMPTON COUNCIL- COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

CENTRE TYPE		2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£22.9	-£24.1	-£24.9	-£9.9	-£4.9
Strategic Centre	Wolverhampton	-2,599	-2,409	-2,200	-989	-656
Town Centre	Bilston	-4	22	50	215	260
	Wednesfield	-1	5	11	46	55
District & Local Centres		-270	-258	-245	-168	-147
Out-of-Centre		-788	-712	-629	-146	-14
CITY OF WOLVERHAMPTON COUNCIL AREA		-3,662	-3,353	-3,012	-1,044	-501

**Appendix 9B: Comparison Goods Capacity:
Dudley MBC**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Dudley	Strategic Centre	Brierley Hill- Traditional High Street	0%	£22.3	£23.2	£26.7	£30.8	£35.9	£37.0
		Brierley Hill- Merry Hill	10%	£987.4	£1,029.9	£1,185.2	£1,364.2	£1,589.4	£1,640.5
	Town Centre	Dudley	0%	£81.7	£85.2	£98.1	£112.9	£131.6	£135.8
		Stourbridge	0%	£76.1	£79.3	£91.3	£105.1	£122.4	£126.4
		Halesowen	0%	£59.1	£61.7	£71.0	£81.7	£95.2	£98.3
	District & Local Centres	0%	£45.4	£47.4	£54.5	£62.8	£73.1	£75.5	
Out-of-Centre	0%	£66.9	£69.8	£80.3	£92.5	£107.7	£111.2		
Dudley MBC Area			£1,339.0	£1,396.6	£1,607.2	£1,849.9	£2,155.4	£2,224.7	

TABLE 2: COMMITTED COMPARISON FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] Dudley - Town Centre	P18/0590	Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1a); non-residential institution uses (D1); car showroom (su1 generis) taxi rank; public space; highways, access and pedestrian connectivity works; car parking; landscaping; associated works (outline, all matters reserved)	4,180	2,926	4,000	£11.7	£12.2	£14.0	£16.1	£18.5	£19.0
[2] Lye-Out-of-Centre	P15/0845	Former Clarkson Place Unit, Thorns Road, Lye, DY5 2LD; Erection of retail store (A1) with associated car parking and landscaping	1,805	251	4,000	£1.0	£1.0	£1.2	£1.4	£1.6	£1.6
[3] Brierley Hill - Edge of Centre	P21/1786	Unit B2 The Boulevard, Merry Hill: installation of a mezzanine floor	998	977	4,000	£3.9	£4.1	£4.7	£5.4	£6.2	£6.3
[4] Brierley Hill - Edge of Centre	P18/0370	Unit 9c, Station Drive, Merry Hill, Brierley Hill, DY5 1SY: Extension to existing mezzanine floor for retail use (Class A1).	473	331	4,000	£1.3	£1.4	£1.6	£1.8	£2.1	£2.1
[5] Gornal-Town Centre	P21/1233	Land at, Zoar Street, Lower Gornal, DY3 2PA. Demolition of 23 & 25 (Eggingtons Chemist) Abbey Road and 7, 8 & 9 Zoar Street	1,786	263	4,000	£1.1	£1.1	£1.3	£1.4	£1.7	£1.7
[6] Netherton-Out-of-Centre	P22/1614	The Crown (Proposed Redevelopment), Simms Lane, Netherton, Dudley, DY2 0PQ. Demolition of the vacant former public house and the redevelopment of the site for a Class E convenience foodstore and two Class E non-food retail units, together with associated access, parking, servicing arrangements and landscaping.	162	113	4,000	£0.5	£0.5	£0.5	£0.6	£0.7	£0.7
[7] Sedgley-Town Centre	P22/0650	Land South of, Bilston Street, Sedgley, Dudley. Demolition of existing buildings and structures and erection of a Food Retail St	1,839	251	4,000	£1.0	£1.0	£1.2	£1.4	£1.6	£1.6
TOTAL			11,243	5,112		£20.4	£21.3	£24.5	£28.1	£32.3	£33.2

Notes:

- [1] A1 shops (non-food): maximum 4,180 sqm gross netted down by a ratio of 70%.
- [2] Built-out. Council states 1,738 sq m of gross A1 retail floorspace and some 1,254 sq m net. The net floorspace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
- [3] Built-out. Plan accompanying application shows 998 sqm gross area and 977 sq m net sales area.
- [4] Built-out. Council data states 473sq m of gross A1 retail floorspace and some 331sq m net.
- [5] A1 application, as per planning and retail statement Gross Area of 1,786sqm with a net sales area of 1,315 sqm net of which 1,052 sqm net (80%) is for convenience goods and 263 sqm net (20%) is for comparison goods.
- [6] One Stop application, as per planning and retail statement Gross Area of 370 with a net sales area of 254 sqm net (all assumed for convenience goods). Non-food units total 162 sqm gross netted down to 113sqm net (based a gross to net ratio of 70%).
- [7] A1 application, as per planning and retail statement Gross Area of 1,839 sqm with a net sales area of 1,254 sqm net of which 1,003 sqm net (80%) is for convenience goods and 251 sqm net (20%) is for comparison goods.

TABLE 3: DUDLEY MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£1,339.0	£1,396.6	£1,607.2	£1,849.9	£2,155.4	£2,224.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£1,339.0	£1,397.1	£1,604.0	£1,841.5	£2,114.1	£2,173.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.5	£3.2	£8.4	£41.3	£51.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£21.3	£24.5	£28.1	£32.3	£33.2
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-£21.8	-£21.3	-£19.7	£9.0	£18.2
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-3,488	-2,966	-2,386	947	1,866
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-4,983	-4,237	-3,411	1,353	2,665

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 4: DUDLEY MBC AREA STRATEGIC CENTRE: BRIERLEY HILL (Incorporating Traditional High St+ Merry Hill) - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£1,009.7	£1,053.1	£1,211.9	£1,394.9	£1,625.3	£1,677.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£1,009.7	£1,053.5	£1,209.5	£1,388.6	£1,594.2	£1,638.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.4	£2.4	£6.3	£31.1	£38.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£5.5	£6.3	£7.2	£8.3	£8.5
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£5.8	-£3.9	-£0.8	£22.8	£30.2
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-832	-539	-102	2,412	3,105
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,332	-769	-146	3,446	4,435

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: DUDLEY MBC AREA : TOWN CENTRE: DUDLEY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£81.7	£85.2	£98.1	£112.9	£131.6	£135.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£81.7	£85.3	£97.9	£112.4	£129.0	£132.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.5	£2.5	£3.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£12.2	£14.0	£16.1	£18.5	£19.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£12.2	-£13.8	-£15.6	-£16.0	-£15.9
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-1,956	-1,924	-1,888	-1,685	-1,629
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,794	-2,748	-2,698	-2,407	-2,327

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: DUDLEY MBC AREA : TOWN CENTRE: STOURBRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£76.1	£79.3	£91.3	£105.1	£122.4	£126.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£76.1	£79.4	£91.1	£104.6	£120.1	£123.4
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.5	£2.3	£2.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.2	£0.5	£2.3	£2.9
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-5	25	58	247	300
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-6	36	83	353	428

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: DUDLEY MBC AREA : TOWN CENTRE: HALESOWEN - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£59.1	£61.7	£71.0	£81.7	£95.2	£98.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£59.1	£61.7	£70.9	£81.3	£93.4	£96.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.4	£1.8	£2.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.4	£1.8	£2.3
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-4	20	45	192	233
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-5	28	64	275	333

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: DUDLEY MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£45.4	£47.4	£54.5	£62.8	£73.1	£75.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£45.4	£47.4	£54.4	£62.5	£71.7	£73.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.3	£1.4	£1.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£2.1	£2.5	£2.8	£3.2	£3.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£2.2	-£2.4	-£2.5	-£1.8	-£1.6
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-345	-328	-308	-195	-164
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-493	-468	-440	-278	-234

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: DUDLEY MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£66.9	£69.8	£80.3	£92.5	£107.7	£111.2
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£66.9	£69.8	£80.2	£92.0	£105.7	£108.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.4	£2.1	£2.6
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.5	£1.7	£2.0	£2.3	£2.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£1.5	-£1.6	-£1.6	-£0.2	£0.2
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-247	-221	-192	-25	21
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-352	-315	-274	-36	30

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: DUDLEY MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

CENTRE TYPE		2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£21.8	-£21.3	-£19.7	£9.0	£18.2
Strategic Centre	Brierley Hill (Traditional High St +Merry Hill)	-932	-539	-102	2,412	3,105
Town Centre	Dudley	-1,956	-1,924	-1,888	-1,685	-1,629
	Stourbridge	-5	25	58	247	300
	Halesowen	-4	20	45	192	233
District & Local Centres		-345	-328	-308	-195	-164
Out-of-Centre		-247	-221	-192	-25	21
DUDLEY MBC AREA		-3,488	-2,966	-2,388	947	1,866

**Appendix 9C: Comparison Goods Capacity:
Sandwell MBC**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE	Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042	
Sandwell	Strategic Centre	West Bromwich	5%	£198.5	£207.0	£238.2	£274.2	£319.5	£329.8
	Town Centre	Blackheath	0%	£27.9	£29.1	£33.5	£39.5	£44.9	£46.3
		Cradley Heath	0%	£5.3	£5.6	£7.6	£8.8	£10.2	£10.5
		Great Bridge	0%	£28.2	£29.4	£33.8	£39.0	£45.4	£46.8
		Oldbury	0%	£90.7	£94.6	£108.8	£125.3	£146.0	£150.6
		Wednesbury	0%	£36.3	£37.9	£43.6	£50.2	£58.5	£60.3
		Cape Hill	0%	£21.7	£22.6	£26.0	£29.9	£34.9	£36.0
		Bearwood	0%	£28.3	£29.5	£34.0	£39.1	£45.5	£47.0
	District & Local Centres		0%	£26.9	£28.1	£32.3	£37.2	£43.4	£44.8
	Out-of-Centre		0%	£326.2	£340.2	£391.5	£450.6	£525.0	£541.9
Sandwell MBC Area				£790.9	£825.0	£949.4	£1,092.7	£1,273.2	£1,314.1

TABLE 2: COMMITTED COMPARISON FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
						2024	2026	2031	2036	2041	2042
[1] West Bromwich-Edge-of-Town Centre	DC/18/62210	Staples Limited Tildasley Street West Bromwich B70 9SJ. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and landscaping) to remove loading bay extension and replace with rear access ramp and new ramp to customer service entrance.	1,973	263	4,000	£1.1	£1.1	£1.3	£1.4	£1.7	£1.7
[2] Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16, Unity Walk, Tipton; DY4 8QL. Proposed change of use to shops (Class A1).	430	151	3,000	£0.5	£0.5	£0.5	£0.6	£0.7	£0.7
[3] Oldbury Town Centre	DC/19/63208	Former Perrott Arms; 2 Birmingham Road, Oldbury, B69 4ED. Proposed change of use and two storey rear extension to create 3 No. shops at ground floor and 2 No. one bedroom flats above.	205	72	3,000	£0.2	£0.2	£0.3	£0.3	£0.3	£0.3
[4] Out-of-Centre: Wolverhampton on Road	DC/20/64517	Former Toys R Us, Wolverhampton Road, Oldbury. Proposed demolition of existing entrance, sub-division of existing retail unit (Class A1) together with external alterations, new shop frontage and cladding, mezzanine floor in Unit 1, creation of ancillary external garden centre area for Unit 2, construction of extension to form new unit for assembly and leisure use (Class D2), and construction of a standalone cafe/drive-thru restaurant, with associated landscaping and alterations to existing car park and internal vehicle circulation.	2,386	1,670	4,000	£6.7	£7.0	£8.0	£9.2	£10.5	£10.8
[5] West Bromwich-Town Centre	DC/21/65989	Kings Cinema Kings Square West Bromwich. Proposed demolition of existing Kings Cinema with ground floor retail and basement storage and construction of 15 storey building consisting of ground floor retail units with first floor storage and 77 apartments with basement residential parking and second floor open-air podium garden as residential amenity area.	972	322	4,000	£1.3	£1.3	£1.5	£1.8	£2.0	£2.1
[6] Oldbury Town Centre-Edge of Centre	DC/23/67955	Units 4 and 5 Oldbury Green Retail Park, Oldbury Ringway, Oldbury B69 3DD. Proposed amalgamation of units 4 and 5 with single storey rear extension, external alterations to rear and new glazed shop frontages.	1,858	260	4,000	£1.0	£1.1	£1.2	£1.4	£1.6	£1.7
TOTAL			7,824	2,737		£10.7	£11.2	£12.8	£14.8	£16.9	£17.4

Notes:

- [1] Built-out, Aldi application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorpace is for convenience goods and that remainder 20% is for comparison goods.
- [2] Built-out. Assumed gross to net ratio of 70% and that 50% of the floorpace is for convenience goods and that 50% is for comparison goods.
- [3] Assumed gross to net ratio of 70% and that 50% of the floorpace is for convenience goods and that 50% is for comparison goods.
- [4] Built-out. The gross floorpace is 2,386 sqm to which a gross to net ratio of 70% has been applied.
- [5] Design & Access Statement indicates GIA of 972 sqm net of which NIA is 643 sqm net. It is assumed that of this net floorpace it will be split equally
- [6] Aldi application, as per planning and retail statement Gross Area of 1,858sqm with a net sales area of 1,300sqm net of which 1,040 sqm net (80%) is for convenience goods and 260 sqm net (20%) is for comparison goods.

TABLE 3: SANDWELL MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£790.9	£825.0	£949.4	£1,092.7	£1,273.2	£1,314.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£790.9	£825.3	£947.5	£1,087.8	£1,248.8	£1,283.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.3	£1.9	£5.0	£24.4	£30.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£11.2	£12.8	£14.8	£16.9	£17.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£11.5	-£11.0	-£9.8	£7.4	£12.9
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorpace Capacity (sq m):	-	-1,835	-1,526	-1,185	785	1,328
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-2,621	-2,181	-1,693	1,121	1,897

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: SANDWELL MBC AREA STRATEGIC CENTRE: WEST BROMWICH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£198.5	£207.0	£238.2	£274.2	£319.5	£329.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£198.5	£207.1	£237.7	£273.0	£313.4	£322.1
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£0.5	£1.2	£6.1	£7.6
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£2.4	£2.8	£3.2	£3.7	£3.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£2.5	-£2.3	-£2.0	£2.4	£3.8
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-402	-324	-238	256	392
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-574	-463	-341	365	560

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: SANDWELL MBC AREA : TOWN CENTRE: BLACKHEATH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£27.9	£29.1	£33.5	£38.5	£44.9	£46.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£27.9	£29.1	£33.4	£38.3	£44.0	£45.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.9	£1.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£0.9	£1.1
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-2	9	-21	81	110
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	13	30	130	157

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: SANDWELL MBC AREA : TOWN CENTRE: CRADLEY HEATH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£6.3	£6.6	£7.6	£8.8	£10.2	£10.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£6.3	£6.6	£7.6	£8.7	£10.0	£10.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.0	£0.2	£0.2
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.0	£0.0	£0.2	£0.2
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	0	2	5	21	25
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1	3	7	29	36

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: SANDWELL MBC AREA : TOWN CENTRE: GREAT BRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£28.2	£29.4	£33.8	£39.0	£45.4	£46.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£28.2	£29.4	£33.8	£38.8	£44.5	£45.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.9	£1.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£0.9	£1.1
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-2	9	21	92	111
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	13	31	131	159

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: SANDWELL MBC AREA : TOWN CENTRE: OLDBURY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£90.7	£94.6	£108.8	£125.3	£146.0	£150.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£90.7	£94.6	£108.6	£124.7	£143.2	£147.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.6	£2.8	£3.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.3	£1.5	£1.7	£2.0	£2.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£1.3	-£1.3	-£1.2	£0.8	£1.4
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-215	-179	-140	86	148
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-307	-256	-200	122	211

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: SANDWELL MBC AREA : TOWN CENTRE: WEDNESBURY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£36.3	£37.9	£43.6	£50.2	£58.5	£60.3
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£36.3	£37.9	£43.5	£49.9	£57.3	£58.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£1.1	£1.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£1.1	£1.4
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-2	12	28	118	143
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-3	17	40	169	204

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: SANDWELL MBC AREA : TOWN CENTRE: CAPE HILL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£21.7	£22.6	£26.0	£29.9	£34.9	£36.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£21.7	£22.6	£26.0	£29.8	£34.2	£35.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.1	£0.7	£0.8
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.1	£0.7	£0.8
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-1	7	17	70	85
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	10	24	101	122

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 11: SANDWELL MBC AREA : TOWN CENTRE: BEARWOOD - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£28.3	£29.5	£34.0	£39.1	£45.5	£47.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£28.3	£29.5	£33.9	£38.9	£44.7	£45.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.9	£1.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£0.9	£1.1
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-2	9	22	82	111
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	13	31	131	159

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 12: SANDWELL MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£26.9	£28.1	£32.3	£37.2	£43.4	£44.8
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£26.9	£28.1	£32.3	£37.0	£42.5	£43.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.8	£1.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.5	£0.5	£0.6	£0.7	£0.7
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.5	-£0.5	-£0.5	£0.1	£0.3
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-77	-66	-55	12	31
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-110	-95	-78	18	44

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 13: SANDWELL MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£326.2	£340.2	£391.5	£450.6	£525.0	£541.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£326.2	£340.3	£390.7	£448.6	£515.0	£529.4
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£0.8	£2.1	£10.0	£12.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£7.0	£8.0	£9.2	£10.5	£10.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£7.1	-£7.2	-£7.1	-£0.5	£1.7
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£8,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-1,133	-1,006	-865	-53	171
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,618	-1,437	-1,236	-75	245

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 14: SANDWELL MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

CENTRE TYPE		2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£11.5	-£11.0	-£9.8	£7.4	£12.9
Strategic Centre	West Bromwich	-402	-324	-238	256	392
Town Centre	Blackheath	-2	9	21	91	110
	Cradley Heath	0	2	5	21	25
	Great Bridge	-2	9	21	92	111
	Oldbury	-215	-179	-140	86	148
	Wednesbury	-2	12	28	118	143
	Cape Hill	-1	7	17	70	85
	Bearwood	-2	9	22	92	111
District & Local Centres	-77	-66	-55	12	31	
Out-of-Centre	-1,133	-1,006	-865	-53	171	
SANDWELL MBC AREA		-1,835	-1,526	-1,185	785	1,328

**Appendix 9D: Comparison Goods Capacity:
Walsall Council**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

LPA	CENTRE TYPE		Estimated 'Inflow' from Outside Study Area	2024	2026	2031	2036	2041	2042
Walsall	Strategic Centre	Walsall	5%	£295.9	£308.6	£355.1	£408.7	£476.2	£491.6
	Town Centre	Blowich	0%	£26.1	£27.2	£31.3	£36.0	£42.0	£43.4
		Brownhills	0%	£17.1	£17.8	£20.5	£23.6	£27.5	£28.4
		Aldridge	0%	£33.2	£34.6	£39.8	£45.8	£53.4	£55.1
		Willenhall	0%	£25.6	£26.7	£30.8	£35.4	£41.3	£42.6
		Darlaston	0%	£9.0	£9.3	£10.7	£12.4	£14.4	£14.9
	District & Local Centres	0%	£10.5	£10.9	£12.6	£14.5	£16.9	£17.4	
Out-of-Centre	0%	£75.0	£78.2	£90.0	£103.6	£120.7	£124.6		
Walsall MBC Area				£492.3	£513.5	£590.9	£680.1	£792.4	£817.9

TABLE 2: COMMITTED COMPARISON FLOORSPACE: WITH PLANNING PERMISSION/UNDER CONSTRUCTION/ BUILT OUT SINCE 2019

	CENTRE	PLANNING REF	SCHEME	Gross Floorpace (sq m)	Net Floorpace (sq m)	Sales Density 2024 (£ per sqm)	Turnover (£m)					
							2024	2026	2031	2036	2041	2042
[1]	Brownhills Town Centre	17/1629	Land Between 75-85 High Street, Brownhills. New 2.5 storey development of 3 commercial units and 3 x 1 bed flats	171	60	4,000	£0.2	£0.2	£0.3	£0.3	£0.4	£0.4
[2]	Walsall Wood (Out-of-Centre)	22/0548	Horse And Jockey, 146, Walsall Road, Walsall Wood, Walsall, WS9 9AJ. Erection of a new discount food store (Use Class E) with access, car parking, landscaping, biodiversity improvements and other associated works.	2,215	282	4,000	£1.1	£1.2	£1.4	£1.6	£1.8	£1.8
[3]	Delves (Out-of-centre)	19/0622	Johal Supermarket, 19, West Bromwich Road, Walsall, WS1 3HS. Demolition of existing buildings and creation of 3 x retail (E (a)) units at ground floor and 5 x residential flats (C3) at first floor.	412	90	4,000	£0.4	£0.4	£0.4	£0.5	£0.6	£0.6
TOTAL				2,798	432		£1.7	£1.8	£2.1	£2.4	£2.7	£2.8

Notes:

- [1] Assumed gross to net ratio of 70% and that 50% of the floorpace is for convenience goods and that 50% is for comparison goods.
 [2] Lidl application, as per planning and retail statement gross floorpace of 2,215sqm. Of which the total net sales area is 1,411 sqm. Of this total, the convenience goods net sales area is 1,129sqm (80%) and comparison goods 282 sqm net (20%).
 [3] Council data states 412 sq m of gross new net additional retail floorpace. It is estimated that from this some 224 sqm net is for convenience goods and some 90sq m net for comparison goods.

TABLE 3: WALSALL MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£492.3	£513.5	£590.9	£680.1	£792.4	£817.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£492.3	£513.6	£589.7	£677.0	£777.2	£799.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.2	£1.2	£3.1	£15.2	£18.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.8	£2.1	£2.4	£2.7	£2.8
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-£2.0	-£0.9	£0.7	£12.4	£16.1
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorpace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorpace Capacity (sq m):	-	-317	-125	87	1,313	1,651
(iii) Assumed Net / Gross Floorpace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorpace Capacity (sq m):		-453	-179	125	1,876	2,359

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: WALSALL MBC AREA STRATEGIC CENTRE: WALSALL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£295.9	£308.6	£355.1	£408.7	£476.2	£491.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£295.9	£308.7	£354.4	£406.9	£467.1	£480.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£0.7	£1.9	£9.1	£11.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.1	£0.7	£1.9	£9.1	£11.3
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-18	98	225	962	1,165
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-25	140	322	1,375	1,665

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: WALSALL MBC AREA : TOWN CENTRE: BLOXWICH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£26.1	£27.2	£31.3	£36.0	£42.0	£43.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£26.1	£27.2	£31.3	£35.9	£41.2	£42.4
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.8	£1.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£0.8	£1.0
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-2	9	20	85	103
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	12	28	121	147

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: BROWNHILLS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£17.1	£17.8	£20.5	£23.6	£27.5	£28.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£17.1	£17.8	£20.5	£23.5	£27.0	£27.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.1	£0.5	£0.7
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.2	£0.3	£0.3	£0.4	£0.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£0.3	-£0.2	-£0.2	£0.1	£0.3
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-41	-34	-27	16	27
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-58	-49	-38	22	39

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: ALDRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£33.2	£34.6	£39.8	£45.8	£53.4	£55.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£33.2	£34.6	£39.7	£45.6	£52.4	£53.8
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£1.0	£1.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£1.0	£1.3
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-2	11	25	108	131
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-3	16	36	154	187

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: WALSALL MBC AREA : TOWN CENTRE: WILLENHALL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£25.6	£26.7	£30.8	£35.4	£41.3	£42.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£25.6	£26.7	£30.7	£35.2	£40.5	£41.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2	£0.8	£1.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.1	£0.2	£0.8	£1.0
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-2	8	20	83	101
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2	12	28	119	144

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: WALSALL MBC AREA : TOWN CENTRE: DARLSTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£9.0	£9.3	£10.7	£12.4	£14.4	£14.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£9.0	£9.3	£10.7	£12.3	£14.1	£14.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.1	£0.3	£0.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.0	£0.1	£0.3	£0.3
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):		-1	3	7	29	35
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1	4	10	42	50

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: WALSALL MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£10.5	£10.9	£12.6	£14.5	£16.9	£17.4
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£10.5	£11.0	£12.6	£14.4	£16.6	£17.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.1	£0.3	£0.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.0	£0.0	£0.1	£0.3	£0.4
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-1	3	8	34	41
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1	5	11	49	59

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: WALSALL MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2024	2026	2031	2036	2041	2042
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£75.0	£78.2	£90.0	£103.6	£120.7	£124.6
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£75.0	£78.3	£89.8	£103.1	£118.4	£121.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.5	£2.3	£2.9
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£1.6	£1.8	£2.0	£2.3	£2.4
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£1.6	-£1.6	-£1.6	£0.0	£0.5
STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,261	£7,187	£8,252	£9,473	£9,739
(ii) Net Floorspace Capacity (sq m):	-	-252	-223	-191	-4	47
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-361	-319	-273	-6	68

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: WALSALL MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

CENTRE TYPE		2026	2031	2036	2041	2042
Residual Expenditure (after Commitments) (£m)		-£2.0	-£0.9	£0.7	£12.4	£16.1
Strategic Centre	Walsall	-18	98	225	962	1,165
Town Centre	Bloxwich	-2	9	20	85	103
	Brownhills	-41	-34	-27	16	27
	Aldridge	-2	11	25	108	131
	Willenhall	-2	8	20	83	101
	Darlaston	-1	3	7	29	35
District & Local Centres		-1	3	8	34	41
Out-of-Centre		-252	-223	-191	-4	47
WALSALL MBC AREA		-317	-125	87	1,313	1,651