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Planning Design Economics

LONDON BOROUGH OF ENFIELD

RETAIL STUDY UPDATE 2009

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by London Borough of Enfield to prepare a retail study in 2007. The key aim of the study was to provide a strategy for development up to 2017 and to inform the Core Strategy under preparation. The 2007 study included an assessment of future need for additional retail, commercial leisure facilities and other town centre uses, and an analysis of the main town and district centres, namely Enfield Town, Edmonton Green, Angel Edmonton, Palmers Green and Southgate. The study also examined a number of local centres distributed throughout the borough and out-of-centre retail parks.

1.2 This report provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. This update report should be read alongside the 2007 retail study and specifically deals with major development completed since the 2007 in Enfield and Edmonton Green town centres. The projections have also been rolled forward to 2025.

1.3 This study update also examines the implication of proposed Strategic Growth Areas in the Borough. These Strategic Growth Areas are expected to deliver higher levels of housing development and additional population than that envisaged in the 2007 study.

1.4 Section 2 of this report summarises recent changes relevant to the retail capacity assessment. Section 3 sets out the updated retail capacity assessment. Section 4 provides the recommendations and conclusions.

2.0 # Recent Changes

Introduction

2.1 The Council's previous retail study (2007) provided projections up to 2017. These figures now need to be updated and rolled forward. The aim of this study update is to provide updated projections for the period up to 2025. The 2007 study did not foresee the current economic recession and the expenditure growth projections adopted are no longer robust. In addition major development has been implemented within the Borough since 2007.

2.2 Central government guidance in PPS6 is in the process of review and will have implications for plan making and development control decisions.

The Implications of PPS6/Draft PPS4

2.3 The 2007 study was based on the guidance set out in PPS6: Planning for Town Centres was published in March 2005. However, proposed changes were published for consultation in July 2008. On 5th May 2009, the Department for Communities and Local Government published a consultation paper on a new PPS4: Planning for Prosperous Economies.

2.4 A major change within PPS6 was the more proactive role councils should play in identifying town centre development sites. PPS6 stated that local planning authorities should plan positively for growth by making provision for a range and choice of shopping, leisure and local services. This suggested the onus is placed on the Council to identify sites to accommodate at least the 5-year demand for development. This approach is not expected to change when PPS4 is adopted.

2.5 The study update must continue to include short/medium/long term projections, and identify whether recent and proposed development proposals can accommodate this need. The proposed changes in PPS4 are not expected to change these objectives or the approach to be adopted by councils.

2.6 Draft PPS4 incorporates the town centre and retail policy statements contained in PPS6 and the policies on economic development in urban and rural areas in PPG4, PPG5 and PPS7 into a single PPS. The aim of the document is "to make planning policies clearer, more concise, more businesslike and easier to use" and brings together all the Government's key planning policies relating to the economy.

2.7 The Good Practice Guide on Need, Impact and the Sequential Approach has been published alongside PPS4 as a "living draft" to help practitioners implement its policies. PPS4 places retail and other town centre development in a wider context, as "economic development" which provides employment, generates wealth and/or economic growth.

Plan Making

2.8 There remains considerable emphasis on the plan-led approach and the "town centres first" policy.

2.9 The roles and responsibilities for regional planning bodies and local planning authorities in preparing the evidence base that will underpin development plan policy are clearly specified. Regional planning bodies will focus on the requirements for comparison retail, leisure and office uses, and must define a network and hierarchy of higher level centres.

2.10 New requirements for local planning authorities include the need to:

- identify deficiencies in floorspace provision, including the provision of local convenience shopping and other facilities which serve day-to-day needs;

- define the network and hierarchy of lower order centres and set out a spatial vision and strategy for the management and growth of centres in their Core Strategy;

- consider setting thresholds for the scale of edge-of-centre and out-of-centre development which should be the subject of an impact assessment, specify the areas where this will apply and the types of impacts having particular local importance; and

- prepare policies for the scale of development likely to be permissible in different centres.

Decision Making

2.11 With the proposed removal of the need test in draft PPS4, the two key tests for applications are the expanded impact test and the sequential test. The assessment of each should be proportionate to the scale and nature of proposals and their likely impact. Following the recommendations of the parliamentary select committee there is now some doubt the need test will be removed as planned.

2.12 The sequential test remains largely unchanged from PPS6. There is no additional clarification on the test, for example on the ambiguity between operators' business models and the need to consider the scope for disaggregation, however the Guide explains how this tension should be assessed.

2.13 Impact assessments are to consider positive and negative impacts, including cumulative effects. The list of impact issues to be considered is longer and more stringent than that which first appeared in the draft changes to PPS6.

2.14 Eight "key impacts" are defined to assess proposals. These include whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions. In addition, scale and accessibility have been added.

2.15 Unless the local planning authority has identified locally important impacts in its development plan, it must also consider impact on allocated sites outside centres, deprived areas and social inclusion objectives, local employment and economic and physical regeneration.

2.16 Where there is clear evidence that a proposal is likely to lead to a significant adverse impact in relation to any of the "key impacts", the recommendation is that the application be refused. Conversely, proposals should be considered favourably where any adverse impacts are likely to be outweighed by their significant wider economic, social and environmental benefits.

2.17 The Guide proposes the introduction of an impact evaluation matrix to help to weigh and balance the impact considerations when determining planning applications.

The London Plan

2.18 The London Plan: Spatial Development Strategy has replaced strategic planning guidance for London (formerly RPG3). The London Plan was published in February 2004, and alterations were consolidated in 2008.

2.19 Policy 3D.1 relates to town centres stating that the Mayor and London Boroughs should: "enhance access to goods and services and strengthen the wider role of town centres, including UDP policies to:

- encourage retail, leisure, and other related uses in town centres, and discourage them outside the town centres;
- improve access to town centres by public transport, cycling and walking;
- enhance the quality for retail and other consumer service in town centres;
- support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing;
- require the location of appropriate health, education and other public and community serving in town centres;
- designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area;
- undertake regular town centre health checks; and

- support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement District in appropriate locations.”

2.20 Policies 3D.2 and 3D.3 are consistent with advice set out in PPS6 (and draft PPS4), regarding maintaining town centres and focusing development within centres. Policies 3D.4 and 3D.5 seek to promote and protect arts/culture and sports facilities.

2.21 The London Plan sets out a hierarchy/classification of centres across London, i.e. international centres (2), metropolitan centres (11), major centres (35) and district centres (146). Enfield is classified as *major centre*. Southgate, Palmers Green, Edmonton Green and Angel Edmonton defined as *district centres*. The London Plan indicates that the broad classification of centres should be refined in the light of local circumstances through development plans.

North London Sub-Regional Development Framework (2006)

2.22 The North London Sub-Regional Development Framework (NLSRDF) was adopted in May 2006 and aims to provide guidance on the implementation of policies in the London Plan in North London. It is divided into two parts: Part One concerns the overall direction of the Sub-Region whilst Part Two looks at implementation.

2.23 In Part Two of the NLSRDF, Enfield Major Centre is identified as a centre with capacity for new mixed use developments in order to strengthen its role within the sub region and one within which this should be located.

The Economic Downturn

2.24 The economic downturn is already having a significant impact on the retail and leisure sectors. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Woolworth, MFI, Land of Leather and Zavvi). Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.25 The previous projections in the 2007 study were based on baseline local retail expenditure data for 2004. Data is now available for 2007, which is the latest available information. However, the most recent Government expenditure data available (2007) still predates this downturn. Projecting expenditure levels within this study update does not assume a continuation of recent past trends (i.e. significant expenditure growth), particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. The study update has taken a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. The study update has taken a balanced approach.

Recent Development

2.26 There has been some significant development activity in the London Borough of Enfield since the previous study was completed, the key developments are as follows:

- the PalaceXchange in Enfield Town Centre has been constructed and is fully occupied by a number of comparison retailers including Next, H&M, New Look and Argos Extra. In addition a Lidl store has opened on Cecil Road;
- the Edmonton Green Shopping Centre extension has been constructed and the Asda store (opened in November 2008) and Argos Extra are now present;
- the Woolworth store in Edmonton Green remains vacant. The Woolworths in Enfield Town Centre has been reoccupied by 99p Stores;
- a Tesco Express store has now opened on Windmill Hill outside Enfield Town Centre and a Tesco Express in Southgate; and
- Budgens on Windmill Hill and M&S Simply Food on Green Lanes has now closed.

2.27 In addition, there are major proposals for large food superstores in neighbouring boroughs. A new food store is proposed as part of the Northumberland Park development in Tottenham (part of the new Tottenham Hotspur football stadium development). There are also proposals by Asda and Tesco to develop large stores in New Barnet. If permitted and implemented these developments are likely to significantly affect food and grocery shopping patterns in the south eastern and western parts of the study area i.e. LB of Enfield’s market share of expenditure in these areas is likely to fall, which may reduce the capacity for food store development in the Borough.

3.0 # Quantitative Scope for Retail Floorspace

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in London Borough of Enfield in the period from 2009 to 2025. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary values expressed in this analysis are at 2007 prices unless stated otherwise. The previous update was based on 2004 prices and therefore the figures are not directly comparable.

Methodology and Data

3.3 The quantitative analysis is based on a study area defined for the five main shopping centres within the Borough, as adopted in the 2007 study. The study area has been divided into 7 zones or sectors (1 to 7) for more detailed analysis.

3.4 The study area is shown on Plan 1 in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Wood Green, Walthamstow, Waltham Cross and Cheshunt. Shopping facilities within the study area are expected to attract a significant proportion of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.

3.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for 2007 have been obtained.

3.6 Experian's latest national expenditure projections have been used to forecast expenditure within the study area, from 2007 to 2009 and beyond. Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's expenditure projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. These latest projections take into account the effect of the recession, with limited or no growth in expenditure between 2008 to 2011.

3.7 For longer term projections (beyond 2011), Experian's ultra long term growth rate has been adopted (0.5% for convenience goods and 4.7% for comparison) to project expenditure up to 2015 and beyond. We believe the Experian's lower Experian Business Strategies (EBS) growth rates reflect the current economic downturn and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

3.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area at 2009. The assessment of penetration rates are based on a range of factors but primarily information gathered through the household survey in 2005, with adjustments to reflect likely changes since 2005, i.e. major developments implemented since 2005.

3.9 The total turnover of shops within LB of Enfield is estimated based on these penetration rates. These turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict information and Mintel's Retail Rankings, which provides an indication of how individual retail units and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Population and Spending

3.10 The study area population for 2009 to 2025 is set out in Table 1B in Appendix B, based on the GLA's (March 2009) growth projections. Population within the study area is expected to increase between 2009 and 2025 by 5.8%.

3.11 Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2025. Comparison forecasts of per capita spending are shown in Table 1C in Appendix C.

3.12 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

3.13 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and E-tailing (Retail Planner Briefing Note 7.0 – August 2009).

3.14 This Experian information suggests that non-store retail sales in 2008 is:

- 5.9% of convenience goods expenditure; and
- 11.3% of comparison goods expenditure.

3.15 Experian predicts that these figures will increase to 8.1% and 13.9% by 2016. For convenience expenditure 5.8% of the 5.9% is estimated to be E-tailing, and the rest 0.1% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (0.5%). The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.

3.16 For comparison expenditure in 2008, 9.1% of the 11.3% is estimated to be E-tailing, and the rest 2.2% is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.

3.17 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.8% and 7.7% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.8% and 8.9% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

3.18 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

3.19 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as "special forms of trading", as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study update, because this expenditure does not affect the need for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. This study makes an allowance for future growth in e-tailing based on Experian's latest projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.20 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Experian's figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

3.21 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

3.22 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 13.9% from £895.01 million in 2009 to £1019.02 million in 2025, as shown in Table 3B. The expenditure projection at 2015 (£948.09 million) is 8% higher than previously forecast for 2017 in the 2007 study, despite two years less growth. This is attributed to the different price base (2007 rather than 2003) and the higher GLA (2008) population projections. The recession has a limited impact on convenience goods growth projections, and historically spending on food and grocery goods is relatively inelastic.

3.23 Comparison goods spending is forecast to double between 2009 and 2025, increasing from £1,410 million in 2009 to £2,863 million in 2025, as shown in Table 2C. These figures relate to real growth and exclude inflation. The previous study provided projections for different years (e.g. 2015 not 2017) and the figures are not directly comparable. The updated expenditure projection for 2017 would be about £1,966 million (derived pro-rata from Table 2C) and is about 15% lower than previously forecast for 2017 in the 2007 study. This decrease in projected expenditure is due to the following:

- actual growth in expenditure (2004 to 2007) has been lower than previously forecast;
- Experian's growth forecasts (2008 to 2012) now reflect the economic downturn and are lower than previous forecasts;

- the reduction for special forms of trading is now higher than that adopted in the 2007 study;
- there has been deflation for comparison goods between 2004 to 2007 prices.

Existing Retail Floorspace 2009

3.24 Existing convenience goods retail sales floorspace within the five town centres including freestanding out-of-centre food stores, is 64,065 sq m net as set out in Table 1A, Appendix A. This floorspace figure excludes comparison sales within food stores. Convenience goods sales floorspace has increased by almost 9,000 sqm since 2007, which can be largely attributed to the new Asda in Edmonton Green, two new Lidl stores (one in Enfield and one in Edmonton Green) and two new Tesco Express stores.

3.25 Comparison goods retail floorspace within the five town centres including the four retail parks, other retail warehouses in the study area and comparison goods sales floorspace in food stores is set out in Table 2A and 3A, Appendix A. Total identified comparison sales floorspace in the District is estimated to be 154,131 sq m net, and has increased from 140,565 sq m net in 2007, due to recent completed development e.g. the PalaceXchange in Enfield and the extension to the Edmonton Green Shopping Centre.

Existing Spending Patterns 2009

Convenience Shopping

3.26 The results of the household shopper survey undertaken in 2005, have been used to estimate existing 2009 shopping patterns within the study area. The estimates of adjusted market share or penetration within each study area zone are shown in Table 4B, Appendix B. The revised level of convenience goods expenditure available for shops in the District at 2009 is £512.63 million (including an allowance for local shops/other retail units outside the five main centres), as shown in Tables 5B, 9B and 10B, Appendix B.

3.27 Company average turnover to sales floorspace densities are available for major food store operators. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

3.28 The total convenience goods benchmark turnover of all identified existing food stores/convenience shops is £519.78 as shown in Table 1A, Appendix A. Our assessment suggests convenience goods expenditure available for these shops/stores (excluding local shops) in 2009 is £512.64 million, which suggests that existing convenience sales floorspace is 2% trading below the expected benchmark turnover, as shown in Table 5B, Appendix B.

Comparison Shopping

3.29 The revised estimated available comparison goods expenditure for facilities in the Borough of Enfield at 2009 is £599.31 million, which includes £432.04 million for comparison shops within designated town, district and local shops plus comparison sales within all food stores, as shown in Table 3C. Retail warehouses' turnover is estimated to be £167.27 million.

3.30 The Borough has 154,131 sq m net of comparison goods floorspace, of which 63,970 sq m net (over 41%) is within out-of-centre retail warehouses. The average sales density of all comparison goods sales floorspace in the Borough is £3,888 per sq m net. The average sales density for retail warehouses is £2,615 per sq m net and, based on company average sales density information within Mintel's Retail Rankings, this is within the range we would expected for these types of stores. Other comparison floorspace in the Borough has an average turnover density of £4,792 per sq m net. The average for high street retailers within Retail Rankings is £5,347 per sq m net.

3.31 On balance comparison sales floorspace in the Borough appears to be trading satisfactorily, but there appears to be no current expenditure surplus following recent developments in Enfield and Edmonton Green, as envisaged in the 2007 study. It is assumed that existing comparison floorspace is trading at equilibrium in 2009.

Quantitative Capacity for Additional Convenience Floorspace

3.32 The level of available convenience goods expenditure in 2009, 2015, 2020, 2025 is shown at Tables 5B, 6B, 7B, 8B in Appendix B, and summarised in Table 9B. The adjusted 2009 market shares are shown in Table 4B in Appendix B, and these take into account completed developments since 2007, including the Asda in Edmonton Green, the Palace Exchange in Enfield and the Edmonton Green Shopping Centre extension.

3.33 The total level of convenience goods expenditure available for shops in the District between 2009 and 2025 is summarised in Table 9B in Appendix B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

3.34 At 2009 the benchmark turnover of existing and proposed convenience floorspace is £519.78 million (Table 9B). There is an expenditure deficit in

2009 of -£7.15 million. At 2015 the benchmark turnover of existing convenience floorspace is £527.62 million (Table 9B) compared with projected available expenditure of £542.41 million. The projected surplus expenditure at 2015 will be £14.79 million and this surplus is projected to increase to £37.40 million by 2025.

3.35 The expenditure projections have been converted into net sales floorspace projections based on the existing average benchmark turnover density of £8,113 per sq m net for food stores, as shown in the Table 10B in Appendix B. Surplus expenditure at 2015 could support 1,795 sq m net, increasing to 4,408 sq m net by 2025.

Comparison Shopping

3.36 Retail development in LB of Enfield will have changed shopping patterns within the study area, and should have helped to reduce comparison expenditure leakage since 2007. This uplift in market share has been taken into account, with the market shares for future comparison shopping penetration rates 2009-2017 (included in the 2007 report) used for current market shares in 2009. The market share estimates have been adjusted to reflect developments completed between 2007 and 2009.

3.37 Further improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from the study area. Conversely, improvements to comparison retailing in competing centres may increase expenditure leakage from the study area. Developments in competing centres, for example emerging proposals in Stratford and Brent Cross, will limit the ability of shopping facilities in LB Enfield to increase their market share of expenditure. However on balance, we believe that the recent developments in Enfield and Edmonton Green should help to maintain expenditure retention. The future development strategy for the Borough should seek to maintain current levels of expenditure retention.

3.38 As indicated earlier, the projections of surplus comparison expenditure in Table 7C assumes that existing comparison sales floorspace is trading at equilibrium with the benchmark levels in 2009.

3.39 Based on these assumptions, we have provided projections of comparison goods expenditure available to shops in the District at 2009, 2015, 2020 and 2025 as shown in Table 3C, 4C, 5C and 6C in Appendix C.

3.40 The growth in comparison goods expenditure available for shops in the District between 2009 and 2025 is summarised in Table 7C, in Appendix C. Future available expenditure is compared with the turnover of existing comparison retail facilities within the District in order to provide estimates of surplus expenditure.

3.41 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Table 7C assumes that the existing 2009 turnover of comparison goods floorspace will remain constant between 2009 to 2011, due to the effects of the recession, but the sales density will increase by 2% per annum thereafter to reflect the expected recovery and higher expenditure growth.

3.42 At 2015 the benchmark turnover of existing comparison floorspace is £648.71 million (Table 7C). Projected surplus expenditure at 2015 will be £98.16 million and this surplus is projected to increase to £417.71 million by 2025.

3.43 The surplus expenditure projections have been converted into net sales floorspace projections based on an average benchmark turnover density of £5,000 per sq m net, as shown in the Table 7C in Appendix C. Surplus expenditure at 2015 could support 13,015 sq m net, increasing to 58,191 sq m net by 2025. In terms of gross floorspace the projection for 2015 is 17,353 sq m (assuming a 75% net to gross ratio), increasing to 77,588 sq m in 2025.

Future Quantitative Capacity Scenarios

3.44 Core Policy 2 of the LB Enfield Core Strategy Submission Report sets out the anticipated new housing delivery estimates over the period of the plan. Enfield's preferred approach is to focus growth in four Strategic Growth Areas (SGAs) within:

- Central Leeside ("Meridian Water");
- Ponders End within North East Enfield;
- the area around the Enfield Town Rail Station; and
- New Southgate within the North Circular Road.

3.45 The low, medium growth and high scenarios within these SGAs have been incorporated into the retail capacity model, in order to estimate the implications of the additional dwellings (population) on the retail floorspace projections over the study period, as shown in Tables 11B, 12B and 13B for convenience goods shopping and Tables 8C, 9C and 10C for comparison goods shopping.

3.46 The low growth scenario suggests 1,663 dwellings will be developed in the SGAs. The medium growth scenario suggests 5,173 dwellings will be developed and 8,500 dwellings are proposed within the high growth scenario. The additional population generated by these new dwellings has been calculated based on 2.2 people per dwelling and apportioned to the relevant study area zone, as shown at the foot of Table 1B. The expenditure generated by the additional dwellings is shown at the foot of Tables 3B and 2C.

Convenience Shopping

3.47 There are also proposals for new food stores in New Barnet (a 3,900 sq m net Asda and a 2,800 sq m net Tesco) and an unnamed food store (7,400 sq m net) at Northumberland Park in Tottenham. The implementation of these food stores is uncertain at this stage, but if implemented these proposals will affect the future convenience shopping penetrations. Tables 13B, 14B and 15B illustrate the effect of the new food stores based in New Barnet only, Tottenham only and in both New Barnet and Tottenham. The high SGA population is adopted for these scenarios.

3.48 Our sensitivity analysis examines six scenarios for convenience shopping. The first three convenience shopping scenarios assume that Enfield will maintain its current 2009 market shares of expenditure in the future, and the three scenarios then adopt low, medium and high SGA population projections. The fourth, fifth and sixth scenarios assume the implementation of large food stores in New Barnet and Tottenham, together with the high population SGA scenario. These six convenience scenarios and the baseline projections are summarised below in Table 3.1 below.

Table 3.1: Convenience Floorspace Projection Scenarios (Cumulative)

Scenario	**Floorspace Sq M Net**		
	by 2015	**by 2020**	**by 2025**
Baseline Projection	1,795	3,767	4,408
1. Low SGA population	2,023	4,217	5,062
2. Medium SGA population	2,509	5,230	6,566
3. High SGA population	2,975	6,195	7,996
4. Food store in New Barnet - high SGA population	596	3,685	5,427
5. Food store in Tottenham - high SGA population	758	3,840	5,552
6. Both food stores - high SGA population	-1,621	1,331	2,983

3.49 The highest floorspace projection up to 2025 is Scenario 3, based on the high SGA population growth, which suggests there is scope for about 8,000 sq m net convenience floorspace, compared with the baseline projection of about 4,400 sq m net. However Scenarios 4, 5 and 6, which assume new food stores will be implemented in New Barnet and Tottenham, suggest that these new stores will absorb some of the projected growth. If both stores are implemented there will be no need for food store development up to and beyond 2015, even based on the high SGA population growth. However, higher population growth within the SGA's (medium or high) could generate scope for food store development between 2020 and 2025, particularly in the Southgate area.

Comparison Shopping

3.50 Our sensitivity analysis examines three scenarios for comparison shopping, based on the low, medium and high SGA population projections. The results of this sensitivity analysis are shown in Table 3.2.

Table 3.2: Comparison Floorspace Projection Scenarios (Cumulative)

Scenario	**Floorspace Sq M Net**		
	by 2015	**by 2020**	**by 2025**
Baseline Projection	13,015	35,142	58,191
1. Low SGA population	13,541	36,264	60,006
2. Medium SGA population	14,614	38,723	64,094
3. High SGA population	15,653	41,079	67,997
Scenario	**Floorspace Sq M Gross**		
	by 2015	**by 2020**	**by 2025**
Baseline Projection	17,353	46,856	77,588
1. Low SGA population	18,055	48,352	80,008
2. Medium SGA population	19,486	51,631	85,459
3. High SGA population	20,870	54,771	90,663

3.51 The high SGA population growth suggests there is scope for about 68,000 sq m net comparison floorspace by 2025 (90,700 sq m gross), compared with the baseline projection of 58,000 sq m net (77,600 sq m gross).

4.0 Conclusions and Recommendations

Introduction

4.1 PPS6 indicates that local planning authorities should assess need for additional floorspace over the plan period, broken down into five year intervals. PPS6 goes on to indicate that in planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly.

4.2 For development control purposes in the next few years, i.e. the projections up to 2015 provide a basis for considering applications that would be completed within a five year period. For future planning policy and site allocations in the LDF it is necessary to seek to identify opportunities to accommodate growth up to 2015 as a minimum. The longer term growth projections up to 2020 and 2025 should be treated with caution and monitored and updated as necessary.

4.3 Government guidance indicates that local authorities should positively plan for growth, and that the quantitative need for retail and other key town centre uses is a key consideration. The projections in this study indicate that commitments (listed in Table 4A in Appendix A) will not meet the expenditure growth going forward. The strategy in the short to medium term should be one of identifying further longer term opportunities for retail development within LB Enfield's town centres.

Convenience Retail Projections

4.4 The analysis of baseline convenience retail shopping patterns in 2009 as set out in Section 3 of this report indicates that existing floorspace in the Borough is trading slightly below expected levels. This creates an expenditure deficit in 2009 of -£7.15 million. However by 2015 convenience floorspace in the Borough will be trading above expected benchmark levels creating an expenditure surplus in 2015 of £14.79 million, but only if food store developments are not implemented in New Barnet and Tottenham.

4.5 This surplus is concentrated primarily in Southgate, with a continued deficit in the Enfield town area. Continued expenditure growth between 2015 and 2025 will increase the total expenditure surplus to £31.49 million in 2020, and £37.40 million in 2025, which similarly is primarily concentrated in Southgate, as shown in Table 10B. These figures take into account the recently opened Asda in Edmonton Green and other new food stores in the Borough. However the figures do not take into account the potential implication of food store proposals in New Barnet and Tottenham. If both stores are implemented by

2015 then there will be an expenditure deficit of about -£13 million, even based on the high SGA population, see Table 16B.

4.6 The **baseline** quantitative capacity analysis indicates there could be scope for the following convenience goods floorspace:

Area	Sales Floorspace Sq M Net (cumulative)		
	By 2015	By 2020	By 2025
Enfield Area	-21	294	528
Edmonton Area	28	335	322
Palmers Green Area	886	1,104	1,135
Southgate Area	2,365	2,787	2,938
Other in the Borough	-1,462	-753	-514
Total	**1,795**	**3,767**	**4,408**

4.7 The **high population SGA** quantitative capacity analysis indicates there could be scope for the following convenience goods floorspace:

Area	Sales Floorspace Sq M Net (cumulative)		
	By 2015	By 2020	By 2025
Enfield Area	264	814	1,263
Edmonton Area	232	1,043	1,488
Palmers Green Area	997	1,286	1,403
Southgate Area	2,513	3,042	3,296
Other in the Borough	-1,012	10	545
Total	**2,975**	**6,195**	**7,996**

4.8 The baseline figures in the first table above, suggest there could be scope to develop a large food store in the Southgate area (about 2,400 sq m net). However the development of a large food store in New Barnet could remove the need for a new store in this area. Given the uncertainty regarding the provision of a new food store in New Barnet we do not believe the Development Plan should allocate sites for food store development in the short term up to 2015. However, development proposals in neighbouring Boroughs need to be monitored, and if these proposals are not implemented then there may be a need to identify opportunities for food stores in Enfield Borough during the period 2015 to 2020, with the likely priority being the Southgate area.

4.9 If no stores are implemented in New Barnet and Tottenham then the longer term requirement for convenience floorspace at 2020 could range from 3,800 sq m net (baseline) to 6,200 sq m net (SGA – high growth), increasing to 4,400 to 8,000 sq m net by 2025, as shown in Tables 10B to 13B.

4.10 However, if both new stores are implemented in New Barnet and Tottenham then there is no need to allocate sites for food stores for the foreseeable future (up to 2020) regardless of the amount of development within the SGA's, as shown in Table 16B. This scenario suggests that the priority should be to provide local scale convenience facilities in the SGA, sufficient only to serve the top up and day to day needs of the new residential areas, rather than large food stores with a wider catchment area, and only where these residential developments areas would not be adequately served by the existing local shopping provision. Residents within new development areas should have access to local shopping provision within 500 metres walking distance.

Comparison Retail Projections

4.11 The analysis of comparison retail shopping patterns indicates that, despite the recent developments at the PalaceXchange in Enfield and the extension to the Edmonton Green Shopping Centre, there will be surplus comparison expenditure in LB Enfield from 2015 (£98.16 million) to 2025 (£417.71 million). Assuming an economic recovery and a return to reasonable levels of growth in expenditure, there will be a need to deliver further comparison retail development in LB Enfield in the short to medium term to accommodate this increasing surplus expenditure. The figures assume LB of Enfield will maintain its existing market share of comparison expenditure.

4.12 The quantitative baseline capacity analysis indicates there could be scope for the following cumulative comparison goods floorspace:

Scenario	**Sales Floorspace Sq M Net (cumulative)**		
	By 2015	**By 2020**	**By 2025**
Baseline	13,015	35,142	58,191
High SGA population	15,653	41,079	67,997
Scenario	**Gross Floorspace Sq M (cumulative)**		
	By 2015	**By 2020**	**By 2025**
Baseline	17,353	46,856	77,588
High SGA population	20,870	54,771	90,663

4.13 The highest floorspace projection up to 2025 (assuming the high SGA population growth) suggests there will be scope for over 90,000 sq m gross comparison floorspace, compared with the baseline projection of 77,000 sq m gross. Existing commitments could provide 5,123 sq m net sales floorspace (6,075 sq m gross), and the figures above take these commitments into account.

4.14 Given uncertainties regarding the scale and timing of development in the SGA's and the impact of major retail development in competing centres (e.g. the extension to Brent Cross and development at Stratford) we believe site capable of accommodating the baseline projections should be identified at this stage, but the impact of the SGA's and competing developments should be monitored.

4.15 The indicative distribution of comparison floorspace in the Borough (based on the baseline figures) is as follows:

Area	**Gross Floorspace Sq M (cumulative)**		
	By 2015	**By 2020**	**By 2025**
Enfield Area	7,100	19,200	31,800
Edmonton Area	1,700	4,700	7,800
Palmers Green Area	1,000	2,800	4,700
Southgate Area	1,400	3,800	6,200
Other in the Borough	6,200	16,400	27,100
Total	**17,400**	**46,900**	**77,600**

Accommodating Growth and Development Strategy

4.16 Given the uncertainty regarding the provision of new food stores near the Borough boundary, we do not believe the Development Plan should allocate sites for food store development in the short term up to 2015. Depending on the implementation of these stores there may be a requirement to identify sites for food store development between 2015 and 2020, but the scale of development required is unclear at this stage.

4.17 In terms of comparison retail capacity, the projections that suggest between 17,000 to 21,000 sq m gross could be provided by 2015, increasing to 47,000 to 55,000 sq m gross by 2020.

4.18 Due to the current effects of the recession, it seems unlikely that major town centre development proposals will come forward during the next 18 months to two years. Town centre development can be relatively complicated and the design and planning stage can be protracted and the construction period typically takes 2-3 years. Developments can take a further 1-2 years to be occupied and trading to full potential. In our view it is unlikely major town centre developments can be completed and trading to their full potential by 2015.

4.19 PPS6 suggests local authorities may look beyond five years when considering major town centre development opportunities. Given the likely timetable to deliver major town centre developments, the Council could seek to identify town opportunities capable of accommodating the baseline comparison floorspace projection up to 2020, i.e. about 47,000 sq m gross. The additional requirement for Class A2 to A5 uses could increase the baseline floorspace figure to about 52,000 sq m gross (assuming at least 10% for other non-A1 retail uses). The high SGA scenario projection would be about 60,000 sq m gross.

4.20 The indicative distribution of comparison/A2 to A5 floorspace in the Borough (based on the baseline figures) is as follows:

Area	**Gross Floorspace Sq M (cumulative)**		
	By 2015	**By 2020**	**By 2025**
Enfield Area	7,800	21,100	35,000
Edmonton Area	1,900	5,200	8,600
Palmers Green Area	1,100	3,100	5,200
Southgate Area	1,500	4,200	6,800
Other in the Borough	6,800	18,000	29,800
Total	**19,100**	**51,600**	**85,400**

4.21 The existing stock of premises is expected to have some role to play in accommodating projected growth shown above. The retail capacity analysis assumes that existing floorspace can increase its turnover to sales floorspace densities and the floorspace projections reflect this assumption. In addition to the growth in sales densities, existing vacant shops will help to accommodate future growth.

4.22 In the 2007 study over 200 vacant shop units were identified within town, district and local centres across the Borough, a vacancy rate of about 9%. Within Enfield town, Edmonton Green and Angel Edmonton there were 35 vacant shop units in 2007, before development proposals were implemented.

4.23 The latest Goad land use surveys for Enfield Town Centre and Edmonton Green/Angel Edmonton, accompanied by NLP site survey in 2009, indicates the following number of existing vacant units (Class A), in comparison to the vacancy rate in the previous study:

Area	**Number of Vacant Units**	
	2007 study	**2009**
Enfield	7	15
Edmonton Green	23	26
Angel Edmonton	5	6
Elsewhere in the Borough	Over 165	No change assumed
Total	**Over 200**	**Over 212**

4.24 The vacancy rate has increased in all three centres and there is potential for vacant shop units to meet some of the projected capacity for new retail floorspace. The 2007 study suggested that about 4,000 sq m gross could be accommodated in vacant shop units. These still appears to be a reasonable minimum. If re-occupied these shop units (4,000 sq m gross) would reduce the 2015 floorspace projection by less than 21%, reduced from 19,100 sq m gross to 15,100 sq m gross.

4.25 The identified opportunities in LB Enfield to meet the floorspace projection are:

- the implementation of the former Bingo Hall and New River Loop site commitments in Enfield town centre;
- the implementation of the change of use of the former Eros nightclub to a retail unit;
- the reoccupation of vacant shop units in the town centres (about 4,000 sq m gross appears a realistic minimum).

Enfield Town Centre

4.26 The 2007 study (Section 18 and Appendix K) identified a number of opportunities to expand town centre uses within and adjacent to Enfield town centre, these included:

- The former Bingo Hall;
- New River Loop Car Park;
- Vacant land Genotin Road;
- Railway station environs;
- Bus Terminus; and
- Magistrates Court

4.27 Since the 2007 study planning permission has been granted for three retail units as part of a mixed use retail/residential scheme at the New River Loop site. In addition, planning permission has been granted to provide four retail units as part of a mixed use development at the former Bingo Hall.

4.28 The Railway Station environs is the main remaining opportunity that could deliver additional retail floorspace, and the 2007 study suggested up to about 10,000 sq m gross could be accommodated, about 19% of the Borough wide baseline projection up to 2020. This area should be the main retail development priority in Enfield town in the period 2015 to 2020.

4.29 Within the district and large centres the 2007 study evaluated 11 potential sites, most of which were small scale. Only 5 sites were rated as reasonable to good, and these sites had a combined capacity of around 3,000 sq m gross.

4.30 These sites, along with re-occupied vacant shops (say 4,000 sq m gross) and the Railway Station area in Enfield town (up to 10,000 sq m gross) could accommodate 17,000 sq m gross in total, and could meet the baseline comparison floorspace projection up to 2015 (17,353 sq m gross).

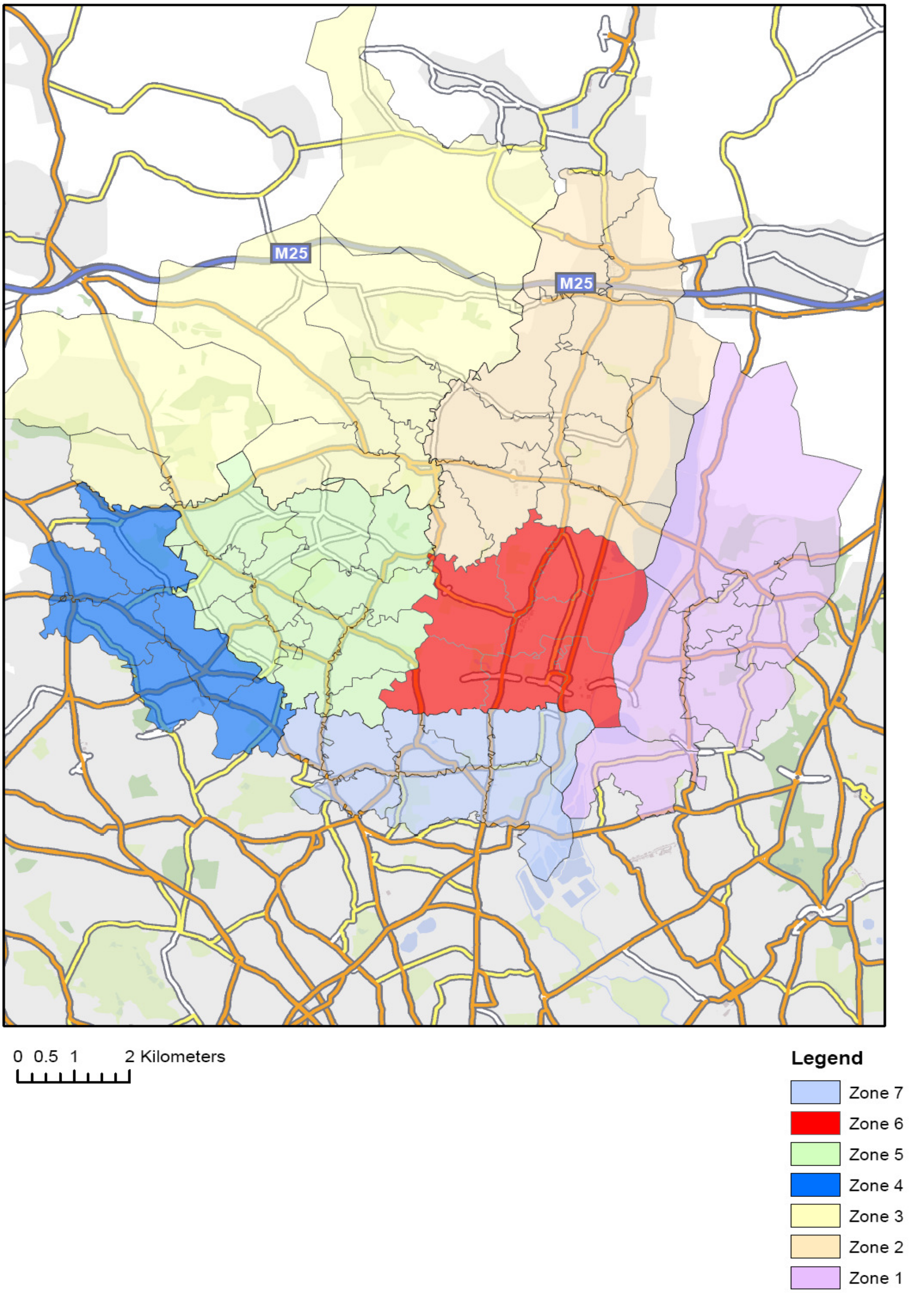
4.31 In the longer term (2015 to 2020) further development sites will need to be identified, to accommodate about 29,500 sq m gross (baseline figures) of comparison floorspace, or 32,500 sq m gross of comparison and A2-A5 floorspace.

4.32 The longer term cumulative floorspace requirement up to 2025 could be between 85,000 to 100,000 sq m gross (comparison and A2-A5 space), depending n the scale of development within the SGA's. This longer term requirement is based predominately on projected growth in expenditure per capita and the maintenance of Enfield's market share of expenditure. There is no need to allocate sites for this scale of development at this stage due to the significant levels of uncertainty. The projections should be monitored and kept under review.

Appendix A

Study Area and Existing Retail Facilities

Plan 1 - Study Area



LONDON BOROUGH OF ENFIELD STUDY AREA ZONES

Zone	Area	Postcode Sectors
1	Chingford	E4 6 E4 7 E4 8 E4 9 E17 5
2	Enfield East	EN1 1 EN1 2 EN1 3 EN1 4 EN3 4 EN3 5 EN3 6 EN3 7 EN8 7 EN8 8
3	Enfield West	EN2 0 EN2 6 EN2 7 EN2 8 EN2 9 EN4 0 EN4 9 EN7 5
4	East Barnet	EN4 8 N11 1 N11 2 N11 3 N20 0 N20 9
5	Southgate/Palmers Green	N13 4 N13 5 N13 6 N14 4 N14 5 N14 6 N14 7 N21 1 N21 2 N21 3
6	Edmonton	N9 0 N9 7 N9 8 N9 9 N18 1 N18 2 N18 3
7	Tottenham	N17 0 N17 6 N17 7 N17 8 N17 9 N22 5 N22 6 N22 8

Table 1A - Large Food Stores Benchmark Convenience Turnover in Enfield (2007 prices)

Centre/Store	Net Sales Floorspace Sq M	Convenience Sales Floorspace %	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Enfield Town Area					
Waitrose, Palace Gardens SC	1,483	97%	1,439	£11,589	£16.67
Marks & Spencer (food hall)	1,054	100%	1,054	£11,759	£12.39
Morrisons, Southbury Road	2,898	90%	2,608	£12,010	£31.32
Tesco, Southbury Road	1,886	97%	1,829	£12,611	£23.07
Sainsbury's, Crown Road	4,645	65%	3,019	£10,217	£30.85
Lidl, Palace Exchange	1,200	85%	1,020	£2,929	£2.99
Other Enfield	800	100%	800	£4,000	£3.20
Enfield Town Total	**13,966**		**11,769**	**£65,115**	**£120.50**
Edmonton Green Area					
Iceland, North Square	395	100%	395	£6,000	£2.37
Tesco Extra, Glover Drive	4,485	65%	2,915	£12,611	£36.76
Asda, West Mount	3,700	60%	2,220	£15,068	£33.45
Tesco Metro, North Mall	2,395	95%	2,275	£12,611	£28.69
Lidl, The Concourse	500	85%	425	£2,929	£1.24
Other Edmonton Green	2,300	100%	2,300	£4,000	£9.20
Edmonton Green Total	**13,775**		**10,531**	**£10,609**	**£111.72**
Upper Edmonton (Angel)					
Other Upper Edmonton (Angel)	3,250	100%	3,250	£4,000	£13.00
Lidl, Sterling Way	1,125	80%	900	£2,929	£2.64
Upper Edmonton Total	**4,375**		**4,150**	**£3,768**	**£15.64**
Palmers Green					
Morrisons, Aldermans Hill	2,485	85%	2,112	£12,010	£25.37
Londis, Green Lanes	250	100%	250	£5,500	£1.38
Other Palmers Green	1,074	100%	1,074	£4,000	£4.30
Palmers Green Total	**3,809**		**3,436**	**£9,033**	**£31.04**
Southgate					
Asda, Chase Side	4,508	60%	2,705	£15,068	£40.76
Tesco Express, Chase Side	200	95%	190	£12,611	£2.40
Marks & Spencer, Winchmore Hill Road	769	85%	654	£11,759	£7.69
Other Southgate	899	100%	899	£4,000	£3.60
Southgate Total	**6,376**		**4,447**	**£12,239**	**£54.43**
Other Local Shops - Large Local Centres	5,618	100%	5,618	£4,000	£22.47
Other Local Shops - Medium Local Centres	6,237	100%	6,237	£4,000	£24.95
Other Local Shops - Small Local Centres	7,039	100%	7,039	£4,000	£28.16
Other Food Stores within the Borough					
Sainsbury's, Green Lanes, Winchmore Hill	4,571	85%	3,885	£10,217	£39.70
Sainsbury's, Highlands Avenue, Winchmore Hill	1,597	95%	1,517	£10,217	£15.50
Tesco, High Street, Ponders End	4,356	75%	3,267	£12,611	£41.20
Co-op, Hertford Road, Enfield Highway	1,206	95%	1,146	£6,753	£7.74
Netto, High Street, Ponders End	989	85%	841	£5,295	£4.45
Tesco Express, Windmill Hill	191	95%	181	£12,611	£2.29
Other Foodstores Total	**12,910**		**10,837**	**£10,231**	**£110.87**
ENFIELD GRAND TOTAL	**74,105**		**64,065**	**£8,113**	**£519.78**
	Comparison Sales Floorspace in Food Stores Sq M Net				**10,040**

Sources: IGD Food Store Directory
Experian Goad
NLP Site Survey 2005/2009

Table 2A - Comparison Floorspace in Town and Local Centres

Town Centre	Gross Floorspace Sq M	Net Sales Floorspace Sq M
Enfield Town Centre		
Town centre comparison shops	42,200	29,540
Sub-Total		**29,540**
Edmonton Green Town Centre		
Town centre comparison shops	11,350	7,945
Sub-Total		**7,945**
Angel Edmonton (Upper) Town Centre		
Town Centre comparison shops	9,780	6,846
Sub-Total		**6,846**
Southgate Town Centre		
Town centre comparison shops	5,727	4,009
Sub-Total		**4,009**
Palmers Green Town Centre		
Town centre comparison shops	7,942	5,559
Sub-Total		**5,559**
Other Enfield		
Large local centres	15,629	10,940
Medium local centres	13,888	9,722
Small local centres	7,943	5,560
Comparison floorspace in food stores	n/a	10,040
Sub-Total		**36,262**
GRAND TOTAL	**n/a**	**90,161**

Sources: NLP Site Survey 2005/2009
Experian Goad
Table 1A

Table 3A - Retail Warehouse Comparison Floorspace

Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M
Ravenside Retail Park		
Wickes Extra	3,395	3,100
Mothercare World	4,000	3,400
Allied Carpets	930	790
Argos Extra	1,820	1,500
Next Home	1,600	1,350
Paul Simon	870	750
Maplin Electronics	510	430
De Mandeville Gate Retail Park		
Argos Extra	929	800
Harveys	1,400	1,200
PC World	1,394	1,200
Easy Living Furniture	1,300	1,000
DFS, Great Cambridge Road	1,672	1,400
Magnet, Great Cambridge Road	1,858	1,600
Carpet Right/Paul Simon, Great Cambridge Road	500	350
Eley Road Retail Park		
MFI	2,720	2,300
Carpet Right	2,720	2,300
Joy Sleep	3,180	2,000
Bensons for Beds	1,200	1,000
Enfield Retail Park (A10)		
B&Q, Dearsley Road	9,492	8,500
Toys'R'Us, Crown Road	3,312	3,200
Currys, Crown Road	1,417	700
JJB Sports, Crown Road	1,400	1,100
Homebase, Crown Road	3,300	2,500
Comet, Crown Road	1,189	700
Sports Direct, Crown Road	3,500	2,800
Halfords, Crown Road	2,800	1,700
Other Retail Warehouses		
Homebase, Station Road	3,300	3,000
Matalan, Mollison Ave	3,850	3,300
Ikea, Glover Drive, Edmonton	21,000	10,000
The Range, Suez Road	3,400	
TOTAL	**89,958**	**63,970**

N.B. Floorspace figures include mezzanines

Sources: NLP Site Survey 2009
VOA
LB of Enfield

Table 4A - Comparison Retail Commitments

Type of Floorspace/Operator	Gross Floorspace Sq M	Net Sales Floorspace Sq M
Former Eros Nightclub, Dearsley Road (application granted for change of use to a retail unit and mezzanine floor)	3,994	3,395
Former Bingo Hall, Burleigh Road	400	280
River Loop Site, Silver Street	281	248
Total	**4,675**	**3,923**
Vacant Retail Warehouse Units		
Former Allied Carpets, Eley Road Retail Park	1,400	1,200
Total	**6,075**	**5,123**

Source: London Borough of Enfield

Appendix B

Convenience Retail Assessment

Table 1B : Population Projections

Catchment Area	2001	2009	2015	2020	2025
1 - Chingford	71842	74,241	74,485	74,415	75,634
2 - Enfield East	105972	108,057	108,215	108,451	109,025
3 - Enfield West	48562	53,865	55,571	56,275	58,057
4 - East Barnet	51262	54,706	62,226	65,900	68,314
5 - Southgate/Palmers Green	76748	83,375	89,988	93,743	93,021
6 - Edmonton	72544	70,422	71,135	70,964	71,344
7 - Tottenham	85766	81,839	86,752	89,055	84,582
	512,696	**526,505**	**548,372**	**558,804**	**559,979**
Additional Population - LOW SCENARIO					
Zone 2 (North East Enfield SGA) 480 dwellings	N/A	N/A	1,056	1,056	1,056
Zone 3 (Enfield Town) 0 dwellings	N/A	N/A	0	0	0
Zone 5 (North Circular SGA) 193 dwellings	N/A	N/A	212	318	425
Zone 6 (Central Leeside SGA) 990 dwellings	N/A	N/A	327	1,307	2,178
Additional Population - MEDIUM SCENARIO					
Zone 2 (North East Enfield SGA) 1000 dwellings	N/A	N/A	2,200	2,200	2,200
Zone 3 (Enfield Town) 0 dwellings	N/A	N/A	0	0	0
Zone 5 (North Circular SGA) 1133 dwellings	N/A	N/A	1,246	1,869	2,493
Zone 6 (Central Leeside SGA) 3040 dwellings	N/A	N/A	1,003	4,013	6,688
Additional Population - HIGH SCENARIO					
Zone 2 (North East Enfield SGA) 1000 dwellings	N/A	N/A	2,200	2,200	2,200
Zone 3 (Enfield Town) 500 dwellings	N/A	N/A	1,100	1,100	1,100
Zone 5 (North Circular SGA) 2000 dwellings	N/A	N/A	2,200	3,300	4,400
Zone 6 (Central Leeside SGA) 5000 dwellings	N/A	N/A	1,650	6,600	11,000

Sources:

Experian 2001 Census Population

GLA 2008 Round Demographic Projections (March 2009)

LB of Enfield Observatory

Population based on an average of 2.2 people per dwelling

Table 2B: Convenience Goods Expenditure Per Capita (2007 Prices)

Expenditure Per Capita	2009	2015	2020	2025	Growth 2009-2015	Growth 2015-2020	Growth 2020-2025
1 - Chingford	£1,704	£1,731	£1,775	£1,820	1.6%	4.2%	6.8%
2 - Enfield East	£1,616	£1,641	£1,683	£1,725	1.5%	4.1%	6.7%
3 - Enfield West	£1,818	£1,847	£1,894	£1,941	1.6%	4.2%	6.8%
4 - East Barnet	£1,781	£1,809	£1,855	£1,902	1.6%	4.2%	6.8%
5 - Southgate/Palmers Green	£1,857	£1,886	£1,934	£1,982	1.6%	4.1%	6.7%
6 - Edmonton	£1,600	£1,625	£1,666	£1,708	1.6%	4.1%	6.7%
7 - Tottenham	£1,601	£1,626	£1,667	£1,709	1.6%	4.1%	6.7%

Sources:

Experian local estimates of 2004 convenience goods expenditure per capita

Excluding special forms of trading - 2.0% in 2009, 2.2% in 2010, 2.3% in 2011 and 2012, 2.5% in 2013, 2.6% in 2014 and 2.8% in 2015 and beyond.

Experian Business Strategies - forecast annual growth rates for 2007 to 2011 (0.9%, -0.5%, 0.2% and 0.6%).

Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (0.5% per annum).

Table 3B: Total Available Convenience Goods Expenditure (£M - 2007 Prices)

Catchment Area	2009	2015	2020	2025	Growth 2009-2015	Growth 2009-2020	Growth 2009-2025
1 - Chingford	£126.51	£128.93	£132.09	£137.65	1.9%	4.4%	8.8%
2 - Enfield East	£174.62	£177.58	£182.52	£188.07	1.7%	4.5%	7.7%
3 - Enfield West	£97.93	£102.64	£106.59	£112.69	4.8%	8.8%	15.1%
4 - East Barnet	£97.43	£112.57	£122.24	£129.93	15.5%	25.5%	33.4%
5 - Southgate/Palmers Green	£154.83	£169.72	£181.30	£184.37	9.6%	17.1%	19.1%
6 - Edmonton	£112.68	£115.59	£118.23	£121.86	2.6%	4.9%	8.1%
7 - Tottenham	£131.02	£141.06	£148.45	£144.55	7.7%	13.3%	10.3%
Total	**£895.01**	**£948.09**	**£991.42**	**£1,019.12**	**5.9%**	**10.8%**	**13.9%**
Additional Population - LOW SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£1.73	£1.78	£1.82	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£0.00	£0.00	£0.00	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£0.40	£0.62	£0.84	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£0.53	£2.18	£3.72	N/A	N/A	N/A
Additional Population - MEDIUM SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£3.61	£3.70	£3.80	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£0.00	£0.00	£0.00	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£2.35	£3.61	£4.94	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£1.63	£6.69	£11.42	N/A	N/A	N/A
Additional Population - HIGH SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£3.61	£3.70	£3.80	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£2.03	£2.08	£2.14	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£4.15	£6.38	£8.72	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£2.68	£11.00	£18.79	N/A	N/A	N/A

Sources: *Table 1B and Table 2B*

Table 4B: **Convenience Shopping Penetration Rates 2009**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow
Food stores/shops in Enfield area	2%	23%	24%	1%	9%	20%	6%	5%
Food stores/shops in Edmonton area	11%	5%	0%	1%	3%	45%	25%	10%
Food stores/shops in Palmers Green area	0%	0%	0%	4%	14%	5%	2%	5%
Food stores/shops in Southgate area	1%	1%	8%	14%	20%	5%	3%	5%
Other facilities in Enfield Borough	3%	23%	17%	3%	45%	18%	4%	5%
LB Enfield Sub-Total	**17%**	**52%**	**49%**	**23%**	**91%**	**93%**	**40%**	**n/a**
Other in Study Area (outside Borough)	**75%**	**38%**	**26%**	**45%**	**5%**	**6%**	**56%**	**n/a**
Expenditure Outflow	**8%**	**10%**	**25%**	**32%**	**4%**	**1%**	**4%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household survey 2005*
NLP

Table 5B: **Convenience Expenditure 2009 £Million**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend
Expenditure 2009	**£126.51**	**£174.62**	**£97.93**	**£97.43**	**£154.83**	**£112.68**	**£131.02**	**n/a**	
Food stores/shops in Enfield area	£2.53	£40.16	£23.50	£0.97	£13.93	£22.54	£7.86	£5.87	**£117.37**
Food stores/shops in Edmonton area	£13.92	£8.73	£0.00	£0.97	£4.64	£50.70	£32.76	£12.41	**£124.14**
Food stores/shops in Palmers Green area	£0.00	£0.00	£0.00	£3.90	£21.68	£5.63	£2.62	£1.78	**£35.61**
Food stores/shops in Southgate area	£1.27	£1.75	£7.83	£13.64	£30.97	£5.63	£3.93	£3.42	**£68.44**
Other facilities in Enfield Borough	£3.80	£40.16	£16.65	£2.92	£69.67	£20.28	£5.24	£8.35	**£167.08**
LB Enfield Sub-Total	**£21.51**	**£90.80**	**£47.98**	**£22.41**	**£140.89**	**£104.79**	**£52.41**	**£31.84**	**£512.63**
Other in Study Area (outside Borough)	**£94.88**	**£66.36**	**£25.46**	**£43.84**	**£7.74**	**£6.76**	**£73.37**	**£0.00**	**£318.42**
Expenditure Outflow	**£10.12**	**£17.46**	**£24.48**	**£31.18**	**£6.19**	**£1.13**	**£5.24**	**£0.00**	**£95.80**
Market Share Total	**£126.51**	**£174.62**	**£97.93**	**£97.43**	**£154.83**	**£112.68**	**£131.02**	**n/a**	**n/a**

Sources: Table 3B and 4B

Table 6B: **Convenience Expenditure 2015 £Million**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend
Expenditure 2015	**£128.93**	**£177.58**	**£102.64**	**£112.57**	**£169.72**	**£115.59**	**£141.06**	**n/a**	
Food stores/shops in Enfield area	£2.58	£40.84	£24.63	£1.13	£15.27	£23.12	£8.46	£6.11	**£122.15**
Food stores/shops in Edmonton area	£14.18	£8.88	£0.00	£1.13	£5.09	£52.02	£35.26	£12.95	**£129.51**
Food stores/shops in Palmers Green area	£0.00	£0.00	£0.00	£4.50	£23.76	£5.78	£2.82	£1.94	**£38.80**
Food stores/shops in Southgate area	£1.29	£1.78	£8.21	£15.76	£33.94	£5.78	£4.23	£3.74	**£74.73**
Other facilities in Enfield Borough	£3.87	£40.84	£17.45	£3.38	£76.37	£20.81	£5.64	£8.86	**£177.22**
LB Enfield Sub-Total	**£21.92**	**£92.34**	**£50.29**	**£25.89**	**£154.44**	**£107.50**	**£56.42**	**£33.60**	**£542.41**
Other in Study Area (outside Borough)	**£96.70**	**£67.48**	**£26.69**	**£50.65**	**£8.49**	**£6.94**	**£78.99**	**n/a**	**£335.94**
Expenditure Outflow	**£10.31**	**£17.76**	**£25.66**	**£36.02**	**£6.79**	**£1.16**	**£5.64**	**n/a**	**£103.34**
Market Share Total	**£128.93**	**£177.58**	**£102.64**	**£112.57**	**£169.72**	**£115.59**	**£141.06**	**n/a**	**n/a**

Sources: Table 3B and 4B

Table 7B: Convenience Expenditure 2020 £Million

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend
Expenditure 2020	**£132.09**	**£182.52**	**£106.59**	**£122.24**	**£181.30**	**£118.23**	**£148.45**	**n/a**	
Food stores/shops in Enfield area	£2.64	£41.98	£25.58	£1.22	£16.32	£23.65	£8.91	£6.33	**£126.63**
Food stores/shops in Edmonton area	£14.53	£9.13	£0.00	£1.22	£5.44	£53.20	£37.11	£13.40	**£134.04**
Food stores/shops in Palmers Green area	£0.00	£0.00	£0.00	£4.89	£25.38	£5.91	£2.97	£2.06	**£41.21**
Food stores/shops in Southgate area	£1.32	£1.83	£8.53	£17.11	£36.26	£5.91	£4.45	£3.97	**£79.38**
Other facilities in Enfield Borough	£3.96	£41.98	£18.12	£3.67	£81.58	£21.28	£5.94	£9.29	**£185.82**
LB Enfield Sub-Total	**£22.45**	**£94.91**	**£52.23**	**£28.12**	**£164.98**	**£109.95**	**£59.38**	**£35.06**	**£567.08**
Other in Study Area (outside Borough)	**£99.07**	**£69.36**	**£27.71**	**£55.01**	**£9.06**	**£7.09**	**£83.13**	**n/a**	**£350.44**
Expenditure Outflow	**£10.57**	**£18.25**	**£26.65**	**£39.12**	**£7.25**	**£1.18**	**£5.94**	**n/a**	**£108.96**
Market Share Total	**£132.09**	**£182.52**	**£106.59**	**£122.24**	**£181.30**	**£118.23**	**£148.45**	**n/a**	**n/a**

Sources: Table 3B and 4B

Table 8B: Convenience Expenditure 2025 £Million

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend
Expenditure 2025	**£137.65**	**£188.07**	**£112.69**	**£129.93**	**£184.37**	**£121.86**	**£144.55**	**n/a**	
Food stores/shops in Enfield area	£2.75	£43.26	£27.05	£1.30	£16.59	£24.37	£8.67	£6.53	**£130.52**
Food stores/shops in Edmonton area	£15.14	£9.40	£0.00	£1.30	£5.53	£54.84	£36.14	£13.59	**£135.94**
Food stores/shops in Palmers Green area	£0.00	£0.00	£0.00	£5.20	£25.81	£6.09	£2.89	£2.10	**£42.10**
Food stores/shops in Southgate area	£1.38	£1.88	£9.02	£18.19	£36.87	£6.09	£4.34	£4.09	**£81.86**
Other facilities in Enfield Borough	£4.13	£43.26	£19.16	£3.90	£82.97	£21.93	£5.78	£9.53	**£190.65**
LB Enfield Sub-Total	**£23.40**	**£97.80**	**£55.22**	**£29.88**	**£167.77**	**£113.33**	**£57.82**	**£35.85**	**£581.07**
Other in Study Area (outside Borough)	**£103.24**	**£71.47**	**£29.30**	**£58.47**	**£9.22**	**£7.31**	**£80.95**	**n/a**	**£359.95**
Expenditure Outflow	**£11.01**	**£18.81**	**£28.17**	**£41.58**	**£7.37**	**£1.22**	**£5.78**	**n/a**	**£113.95**
Market Share Total	**£137.65**	**£188.07**	**£112.69**	**£129.93**	**£184.37**	**£121.86**	**£144.55**	**n/a**	**n/a**

Sources: Table 3B and 4B

Table 9B: Summary of Convenience Turnover 2009 to 2025 (£Million)

Town	2009	2015	2020	2025
Available Expenditure in Enfield				
Food stores/shops in Enfield area	£117.37	£122.15	£126.63	£130.52
Food stores/shops in Edmonton area	£124.14	£129.51	£134.04	£135.94
Food stores/shops in Palmers Green area	£35.61	£38.80	£41.21	£42.10
Food stores/shops in Southgate area	£68.44	£74.73	£79.38	£81.86
Other facilities in Enfield Borough	£167.08	£177.22	£185.82	£190.65
Total	**£512.63**	**£542.41**	**£567.08**	**£581.07**
Benchmark Turnover of Facilities				
Food stores/shops in Enfield area	£120.50	£122.32	£124.16	£126.04
Food stores/shops in Edmonton area	£127.36	£129.28	£131.23	£133.21
Food stores/shops in Palmers Green area	£31.04	£31.51	£31.98	£32.47
Food stores/shops in Southgate area	£54.43	£55.25	£56.09	£56.93
Other facilities in Enfield Borough	£186.45	£189.26	£192.12	£195.02
Total	**£519.78**	**£527.62**	**£535.59**	**£543.67**
Surplus Expenditure				
Food stores/shops in Enfield area	-£3.13	-£0.17	£2.46	£4.48
Food stores/shops in Edmonton area	-£3.22	£0.23	£2.80	£2.73
Food stores/shops in Palmers Green area	£4.57	£7.30	£9.23	£9.63
Food stores/shops in Southgate area	£14.01	£19.48	£23.30	£24.93
Other facilities in Enfield Borough	-£19.37	-£12.04	-£6.30	-£4.36
Total	**-£7.15**	**£14.79**	**£31.49**	**£37.40**

Sources: Tables 1A, 4B to 8B

Table 10B: Convenience Floorspace Projections 2009 to 2025 (Baseline)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£3.13	-£0.17	£2.46	£4.48
Food stores/shops in Edmonton area	-£3.22	£0.23	£2.80	£2.73
Food stores/shops in Palmers Green area	£4.57	£7.30	£9.23	£9.63
Food stores/shops in Southgate area	£14.01	£19.48	£23.30	£24.93
Other facilities in Enfield Borough	-£19.37	-£12.04	-£6.30	-£4.36
Total	**-£7.15**	**£14.79**	**£31.49**	**£37.40**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-386	-21	294	528
Food stores/shops in Edmonton area	-397	28	335	322
Food stores/shops in Palmers Green area	563	886	1,104	1,135
Food stores/shops in Southgate area	1,727	2,365	2,787	2,938
Other facilities in Enfield Borough	-2,388	-1,462	-753	-514
Total	**-881**	**1,795**	**3,767**	**4,408**

Sources: Tables 1A, 2A, 5B to 9B

Table 11B: Convenience Floorspace Projections 2009 to 2025 (Strategic Growth Area - Low population scenario)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£3.13	£0.40	£3.41	£5.78
Food stores/shops in Edmonton area	-£3.22	£0.61	£4.01	£4.72
Food stores/shops in Palmers Green area	£4.57	£7.38	£9.43	£9.95
Food stores/shops in Southgate area	£14.01	£19.61	£23.56	£25.32
Other facilities in Enfield Borough	-£19.37	-£11.33	-£5.16	-£2.82
Total	**-£7.15**	**£16.66**	**£35.25**	**£42.95**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-386	48	408	681
Food stores/shops in Edmonton area	-397	74	480	556
Food stores/shops in Palmers Green area	563	896	1,129	1,173
Food stores/shops in Southgate area	1,727	2,381	2,818	2,984
Other facilities in Enfield Borough	-2,388	-1,376	-617	-332
Total	**-881**	**2,023**	**4,217**	**5,062**

Sources: Tables 1A, 2A, 5B to 9B

Table 12B: Convenience Floorspace Projections 2009 to 2025
(Strategic Growth Area - Medium population scenario)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£3.13	£1.27	£5.11	£8.27
Food stores/shops in Edmonton area	-£3.22	£1.32	£6.47	£8.82
Food stores/shops in Palmers Green area	£4.57	£7.73	£10.11	£10.96
Food stores/shops in Southgate area	£14.01	£20.09	£24.45	£26.61
Other facilities in Enfield Borough	-£19.37	-£9.75	-£2.42	£1.06
Total	**-£7.15**	**£20.67**	**£43.72**	**£55.72**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-386	154	611	975
Food stores/shops in Edmonton area	-397	161	774	1,039
Food stores/shops in Palmers Green area	563	938	1,210	1,292
Food stores/shops in Southgate area	1,727	2,440	2,924	3,136
Other facilities in Enfield Borough	-2,388	-1,184	-289	125
Total	**-881**	**2,509**	**5,230**	**6,566**

Sources: Tables 1A, 2A, 5B to 9B

Table 13B: Convenience Floorspace Projections 2009 to 2025
(Strategic Growth Area - High population scenario)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£3.13	£2.17	£6.80	£10.72
Food stores/shops in Edmonton area	-£3.22	£1.91	£8.72	£12.63
Food stores/shops in Palmers Green area	£4.57	£8.05	£10.75	£11.91
Food stores/shops in Southgate area	£14.01	£20.70	£25.43	£27.97
Other facilities in Enfield Borough	-£19.37	-£8.33	£0.08	£4.63
Total	**-£7.15**	**£24.50**	**£51.78**	**£67.85**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-386	264	814	1,263
Food stores/shops in Edmonton area	-397	232	1,043	1,488
Food stores/shops in Palmers Green area	563	977	1,286	1,403
Food stores/shops in Southgate area	1,727	2,513	3,042	3,296
Other facilities in Enfield Borough	-2,388	-1,012	10	545
Total	**-881**	**2,975**	**6,195**	**7,996**

Sources: Tables 1A, 2A, 5B to 9B

Table 14B: Convenience Floorspace Projections 2009 to 2025
(SGA - High population and food store development in New Barnet)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£6.82	-£1.86	£2.54	£6.27
Food stores/shops in Edmonton area	-£3.22	£1.91	£8.72	£12.63
Food stores/shops in Palmers Green area	£2.43	£5.63	£8.13	£9.19
Food stores/shops in Southgate area	£8.69	£14.75	£19.05	£21.33
Other facilities in Enfield Borough	-£25.81	-£15.52	-£7.63	-£3.36
Total	**-£24.73**	**£4.91**	**£30.81**	**£46.05**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-841	-226	304	739
Food stores/shops in Edmonton area	-397	232	1,043	1,488
Food stores/shops in Palmers Green area	299	683	972	1,083
Food stores/shops in Southgate area	1,071	1,791	2,279	2,514
Other facilities in Enfield Borough	-3,181	-1,884	-913	-396
Total	**-3,049**	**596**	**3,685**	**5,427**

Sources: Tables 1A, 2A, 5B to 9B

Table 15B: Convenience Floorspace Projections 2009 to 2025
(SGA - High population scenario and food store development in Tottenham)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£6.19	-£1.06	£3.30	£7.00
Food stores/shops in Edmonton area	-£13.20	-£8.64	-£2.60	£0.81
Food stores/shops in Palmers Green area	£3.97	£7.43	£10.07	£11.16
Food stores/shops in Southgate area	£13.41	£20.08	£24.75	£27.23
Other facilities in Enfield Borough	-£22.44	-£11.56	-£3.42	£0.91
Total	**-£24.44**	**£6.24**	**£32.10**	**£47.11**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-763	-129	395	825
Food stores/shops in Edmonton area	-1,627	-1,049	-311	96
Food stores/shops in Palmers Green area	490	902	1,204	1,316
Food stores/shops in Southgate area	1,653	2,438	2,961	3,209
Other facilities in Enfield Borough	-2,765	-1,404	-409	107
Total	**-3,012**	**758**	**3,840**	**5,552**

Sources: Tables 1A, 2A, 5B to 9B

Table 16B: Convenience Floorspace Projections 2009 to 2025
(SGA - High population scenario and food store development in both New Barnet and Tottenham)

Town	2009	2015	2020	2025
Surplus Expenditure				
Food stores/shops in Enfield area	-£9.88	-£5.09	-£0.96	£2.55
Food stores/shops in Edmonton area	-£13.20	-£8.64	-£2.60	£0.81
Food stores/shops in Palmers Green area	£1.83	£5.00	£7.45	£8.45
Food stores/shops in Southgate area	£8.10	£14.13	£18.37	£20.59
Other facilities in Enfield Borough	-£28.87	-£18.75	-£11.14	-£7.08
Total	**-£42.02**	**-£13.35**	**£11.12**	**£25.32**
Turnover Density New Floorspace £ Per Sq M	£8,113	£8,235	£8,360	£8,486
New Floorspace Sq M Net				
Food stores/shops in Enfield area	-1,218	-619	-115	300
Food stores/shops in Edmonton area	-1,627	-1,049	-311	96
Food stores/shops in Palmers Green area	226	608	891	996
Food stores/shops in Southgate area	998	1,716	2,198	2,426
Other facilities in Enfield Borough	-3,558	-2,277	-1,332	-835
Total	**-5,179**	**-1,621**	**1,331**	**2,983**

Sources: Tables 1A, 2A, 5B to 9B

Appendix C

Comparison Retail Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2007 Prices)

Expenditure Per Capita	2009	2015	2020	2025	Growth 2009-2015	Growth 2009-2020	Growth 2009-2025
1 - Chingford	£2,695	£3,232	£4,067	£5,116	19.9%	50.9%	89.8%
2 - Enfield East	£2,543	£3,050	£3,838	£4,828	19.9%	50.9%	89.9%
3 - Enfield West	£3,087	£3,703	£4,658	£5,861	20.0%	50.9%	89.9%
4 - East Barnet	£2,948	£3,536	£4,448	£5,597	19.9%	50.9%	89.9%
5 - Southgate/Palmers Green	£3,106	£3,726	£4,687	£5,897	20.0%	50.9%	89.9%
6 - Edmonton	£2,295	£2,753	£3,463	£4,357	20.0%	50.9%	89.8%
7 - Tottenham	£2,290	£2,747	£3,456	£4,348	20.0%	50.9%	89.9%

Sources:

Experian local estimates of 2007 comparison goods expenditure per capita

Excluding special froms of trading - 8.1% in 2009, 8.9% in 2015, 8.9% in 2016 and beyond

Experian Business Strategies - forecast annual growth rates for 2009 to 2011 (1.1%,-0.4%,- 1.1% and 4.7%)

Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (4.7% per annum)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2007 Prices)

Catchment Area	2009	2015	2020	2025	Growth 2009-2015	Growth 2009-2020	Growth 2009-2025
1 - Chingford	£200.08	£240.74	£302.65	£386.95	20.3%	51.3%	93.4%
2 - Enfield East	£274.79	£330.06	£416.23	£526.37	20.1%	51.5%	91.6%
3 - Enfield West	£166.28	£205.78	£262.13	£340.27	23.8%	57.6%	104.6%
4 - East Barnet	£161.27	£220.03	£293.12	£382.36	36.4%	81.8%	137.1%
5 - Southgate/Palmers Green	£258.96	£335.29	£439.37	£548.55	29.5%	69.7%	111.8%
6 - Edmonton	£161.62	£195.84	£245.75	£310.85	21.2%	52.1%	92.3%
7 - Tottenham	£187.41	£238.31	£307.77	£367.76	27.2%	64.2%	96.2%
Total	**£1,410.42**	**£1,766.04**	**£2,267.03**	**£2,863.10**	**25.2%**	**60.7%**	**103.0%**
Additional Population - LOW SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£3.22	£4.05	£5.10	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£0.00	£0.00	£0.00	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£0.79	£1.49	£2.51	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£0.90	£4.53	£9.49	N/A	N/A	N/A
Additional Population - MEDIUM SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£6.71	£8.44	£10.62	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£0.00	£0.00	£0.00	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£4.64	£8.76	£14.70	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£2.76	£13.90	£29.14	N/A	N/A	N/A
Additional Population - HIGH SCENARIO							
Zone 2 (North East Enfield SGA)	N/A	£6.71	£8.44	£10.62	N/A	N/A	N/A
Zone 3 (Enfield Town)	N/A	£4.07	£5.12	£6.45	N/A	N/A	N/A
Zone 5 (North Circular SGA)	N/A	£8.20	£15.47	£25.95	N/A	N/A	N/A
Zone 6 (Central Leeside SGA)	N/A	£4.54	£22.86	£47.93	N/A	N/A	N/A

Sources: *Table 1B and Table 1C*

Table 3C: **Comparison Shopping Penetration Rates and Available Expenditure 2009**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend.
Expenditure 2009	**£200.08**	**£274.79**	**£166.28**	**£161.27**	**£258.96**	**£161.62**	**£187.41**	**n/a**	**£1,410.42**
Market Share									
Retail Warehouses in LB of Enfield	5%	14%	13%	5%	13%	17%	6%	10%	
Other comparison facilities in LB Enfield	8%	33%	29%	12%	51%	62%	9%	2%	
Borough Area Total	**13%**	**47%**	**42%**	**17%**	**64%**	**79%**	**15%**	**n/a**	
Rest of Study Area	**26%**	**1%**	**2%**	**2%**	**1%**	**3%**	**20%**	**n/a**	
Elsewhere outside study area	**61%**	**52%**	**56%**	**81%**	**35%**	**18%**	**65%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Inflow Expend.**	**Total £M**
Turnover £M									
Retail Warehouses in LB of Enfield	£10.00	£38.47	£21.62	£8.06	£33.67	£27.48	£11.24	£16.73	**£167.27**
Other comparison facilities in LB Enfield	£16.01	£90.68	£48.22	£19.35	£132.07	£100.20	£16.87	£8.64	**£432.04**
Borough Area Total	**£26.01**	**£129.15**	**£69.84**	**£27.42**	**£165.74**	**£127.68**	**£28.11**	**£25.37**	**£599.31**
Rest of Study Area	**£52.02**	**£2.75**	**£3.33**	**£3.23**	**£2.59**	**£4.85**	**£37.48**	**n/a**	**£106.24**
Elsewhere outside study area	**£122.05**	**£142.89**	**£93.12**	**£130.63**	**£90.64**	**£29.09**	**£121.82**	**n/a**	**£730.23**
TOTAL	**£200.08**	**£274.79**	**£166.28**	**£161.27**	**£258.96**	**£161.62**	**£187.41**	**n/a**	**n/a**

Sources: *Table 2C*
NEMS Household and Street Surveys 2005
NLP

Table 4C: Comparison Shopping Penetration Rates and Available Expenditure 2015

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend.
Expenditure 2015	**£240.74**	**£330.06**	**£205.78**	**£220.03**	**£335.29**	**£195.84**	**£238.31**	**n/a**	**£1,766.04**
Market Share									
Retail Warehouses in LB of Enfield	5%	14%	13%	5%	13%	17%	6%	10%	
Other comparison facilities in LB Enfield	8%	33%	29%	12%	51%	62%	9%	2%	
Borough Area Total	**13%**	**47%**	**42%**	**17%**	**64%**	**79%**	**15%**	**n/a**	
Rest of Study Area	**26%**	**1%**	**2%**	**2%**	**1%**	**3%**	**20%**	**n/a**	
Elsewhere outside study area	**61%**	**52%**	**56%**	**81%**	**35%**	**18%**	**65%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Inflow Expend.**	**Total £M**
Turnover £M									
Retail Warehouses in LB of Enfield	£12.04	£46.21	£26.75	£11.00	£43.59	£33.29	£14.30	£20.80	**£207.97**
Other comparison facilities in LB Enfield	£19.26	£108.92	£59.68	£26.40	£171.00	£121.42	£21.45	£10.78	**£538.90**
Borough Area Total	**£31.30**	**£155.13**	**£86.43**	**£37.41**	**£214.59**	**£154.71**	**£35.75**	**£31.58**	**£746.87**
Rest of Study Area	**£62.59**	**£3.30**	**£4.12**	**£4.40**	**£3.35**	**£5.88**	**£47.66**	**n/a**	**£131.30**
Elsewhere outside study area	**£146.85**	**£171.63**	**£115.24**	**£178.22**	**£117.35**	**£35.25**	**£154.90**	**n/a**	**£919.44**
TOTAL	**£240.74**	**£330.06**	**£205.78**	**£220.03**	**£335.29**	**£195.84**	**£238.31**	**n/a**	**n/a**

Sources: *Table 2C*
NEMS Household and Street Surveys 2005
NLP

Table 5C: **Comparison Shopping Penetration Rates and Available Expenditure 2020**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend.
Expenditure 2020	**£302.65**	**£416.23**	**£262.13**	**£293.12**	**£439.37**	**£245.75**	**£307.77**	**n/a**	**£2,267.03**
Market Share									
Retail Warehouses in LB of Enfield	5%	14%	13%	5%	13%	17%	6%	10%	
Other comparison facilities in LB Enfield	8%	33%	29%	12%	51%	62%	9%	2%	
Borough Area Total	**13%**	**47%**	**42%**	**17%**	**64%**	**79%**	**15%**	**n/a**	
Rest of Study Area	**26%**	**1%**	**2%**	**2%**	**1%**	**3%**	**20%**	**n/a**	
Elsewhere outside study area	**61%**	**52%**	**56%**	**81%**	**35%**	**18%**	**65%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Inflow Expend.**	**Total £M**
Turnover £M									
Retail Warehouses in LB of Enfield	£15.13	£58.27	£34.08	£14.66	£57.12	£41.78	£18.47	£26.61	**£266.11**
Other comparison facilities in LB Enfield	£24.21	£137.36	£76.02	£35.17	£224.08	£152.36	£27.70	£13.81	**£690.72**
Borough Area Total	**£39.34**	**£195.63**	**£110.10**	**£49.83**	**£281.20**	**£194.14**	**£46.17**	**£40.43**	**£956.83**
Rest of Study Area	**£78.69**	**£4.16**	**£5.24**	**£5.86**	**£4.39**	**£7.37**	**£61.55**	**n/a**	**£167.28**
Elsewhere outside study area	**£184.61**	**£216.44**	**£146.79**	**£237.43**	**£153.78**	**£44.23**	**£200.05**	**n/a**	**£1,183.35**
TOTAL	**£302.65**	**£416.23**	**£262.13**	**£293.12**	**£439.37**	**£245.75**	**£307.77**	**n/a**	**n/a**

Sources: *Table 2C*
NEMS Household and Street Surveys 2005
NLP

Table 6C: **Comparison Shopping Penetration Rates and Available Expenditure 2025**

Centre/Facilities	Zone 1 Chingford	Zone 2 Enfield East	Zone 3 Enfield West	Zone 4 East Barnet	Zone 5 Southgate/ Palmers Green	Zone 6 Edmonton	Zone 7 Tottenham	% Inflow	Total Expend.
Expenditure 2025	**£386.95**	**£526.37**	**£340.27**	**£382.36**	**£548.55**	**£310.85**	**£367.76**	**n/a**	**£2,863.10**
Market Share									
Retail Warehouses in LB of Enfield	5%	14%	13%	5%	13%	17%	6%	10%	
Other comparison facilities in LB Enfield	8%	33%	29%	12%	51%	62%	9%	2%	
Borough Area Total	**13%**	**47%**	**42%**	**17%**	**64%**	**79%**	**15%**	**n/a**	
Rest of Study Area	**26%**	**1%**	**2%**	**2%**	**1%**	**3%**	**20%**	**n/a**	
Elsewhere outside study area	**61%**	**52%**	**56%**	**81%**	**35%**	**18%**	**65%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Inflow Expend.**	**Total £M**
Turnover £M									
Retail Warehouses in LB of Enfield	£19.35	£73.69	£44.24	£19.12	£71.31	£52.84	£22.07	£33.62	**£336.24**
Other comparison facilities in LB Enfield	£30.96	£173.70	£98.68	£45.88	£279.76	£192.73	£33.10	£17.44	**£872.25**
Borough Area Total	**£50.30**	**£247.40**	**£142.91**	**£65.00**	**£351.07**	**£245.57**	**£55.16**	**£51.07**	**£1,208.48**
Rest of Study Area	**£100.61**	**£5.26**	**£6.81**	**£7.65**	**£5.49**	**£9.33**	**£73.55**	**n/a**	**£208.69**
Elsewhere outside study area	**£236.04**	**£273.71**	**£190.55**	**£309.71**	**£191.99**	**£55.95**	**£239.05**	**n/a**	**£1,497.00**
TOTAL	**£386.95**	**£526.37**	**£340.27**	**£382.36**	**£548.55**	**£310.85**	**£367.76**	**n/a**	**n/a**

Sources: *Table 2C*
NEMS Household and Street Surveys 2005
NLP

Table 7C: Comparison Retail Summary 2009 to 2025 (Baseline)

Centre	2009	2015	2020	2025
Total available expenditure in LB of Enfield £M	£599.31	£746.87	£956.83	£1,208.48
Turnover of existing floorspace in LB of Enfield £M	£599.31	£648.71	£716.23	£790.78
Total £M	**£599.31**	**£648.71**	**£716.23**	**£790.78**
Surplus Expenditure £M	n/a	£98.16	£240.60	£417.71
Turnover density new floorspace £ per Sq M Net	£5,000	£5,412	£5,975	£6,597
New Floorspace Sq M Net	n/a	18,138	40,265	63,314
Commitments - New Floorspace Sq M Net	n/a	5,123	5,123	5,123
Remaining Floorpsace Capacity Sq M Net	n/a	13,015	35,142	58,191
Remaining Floorpsace Capacity Sq M Gross	n/a	17,353	46,856	77,588

Sources: *Tables 3A, 4A, 3C to 6C*

Table 8C: Comparison Retail Summary 2009 to 2025 (Strategic Growth Area - Low population scenario)

Centre	2009	2015	2020	2025
Total available expenditure in LB of Enfield £M	£599.31	£749.72	£963.54	£1,220.46
Turnover of existing floorspace in LB of Enfield £M	£599.31	£648.71	£716.23	£790.78
Total £M	**£599.31**	**£648.71**	**£716.23**	**£790.78**
Surplus Expenditure £M	n/a	£101.01	£247.31	£429.68
Turnover density new floorspace £ per Sq M Net	£5,000	£5,412	£5,975	£6,597
New Floorspace Sq M Net	n/a	18,664	41,387	65,129
Commitments - New Floorspace Sq M Net	n/a	5,123	5,123	5,123
Remaining Floorpsace Capacity Sq M Net	n/a	13,541	36,264	60,006
Remaining Floorpsace Capacity Sq M Gross	n/a	18,055	48,352	80,008

Sources: *Tables 3A, 4A, 3C to 6C*

Table 9C: Comparison Retail Summary 2009 to 2025 (Strategic Growth Area - Medium population scenario)

Centre	2009	2015	2020	2025
Total available expenditure in LB of Enfield £M	£599.31	£755.53	£978.23	£1,247.43
Turnover of existing floorspace in LB of Enfield £M	£599.31	£648.71	£716.23	£790.78
Total £M	**£599.31**	**£648.71**	**£716.23**	**£790.78**
Surplus Expenditure £M	n/a	£106.82	£262.00	£456.65
Turnover density new floorspace £ per Sq M Net	£5,000	£5,412	£5,975	£6,597
New Floorspace Sq M Net	n/a	19,737	43,846	69,217
Commitments - New Floorspace Sq M Net	n/a	5,123	5,123	5,123
Remaining Floorpsace Capacity Sq M Net	n/a	14,614	38,723	64,094
Remaining Floorpsace Capacity Sq M Gross	n/a	19,486	51,631	85,459

Sources: *Tables 3A, 4A, 3C to 6C*

Table 10C: Comparison Retail Summary 2009 to 2025 (Strategic Growth Area - High population scenario)

Centre	**2009**	**2015**	**2020**	**2025**
Total available expenditure in LB of Enfield £M	£599.31	£761.15	£992.31	£1,273.18
Turnover of existing floorspace in LB of Enfield £M	£599.31	£648.71	£716.23	£790.78
Total £M	**£599.31**	**£648.71**	**£716.23**	**£790.78**
Surplus Expenditure £M	n/a	£112.44	£276.08	£482.40
Turnover density new floorspace £ per Sq M Net	£5,000	£5,412	£5,975	£6,597
New Floorspace Sq M Net	n/a	20,776	46,202	73,120
Commitments - New Floorspace Sq M Net	n/a	5,123	5,123	5,123
Remaining Floorpsace Capacity Sq M Net	n/a	15,653	41,079	67,997
Remaining Floorpsace Capacity Sq M Gross	n/a	20,870	54,771	90,663

Sources: *Tables 3A, 4A, 3C to 6C*