PROPOSED LIDL FOODSTORE, BANKWOOD WAY, BIRSTALL

COMPARISON GOODS RETAIL IMPACT ASSESSMENT

Table 1: Population of Study Area

Zone	2011	2019	2021	2026	2031	Growth 2019-2021		Growth 2021-2026		Growth 2021-2031	
						Persons	%	Persons	%	Persons	%
Zone 9 - Birstall and Batley (Primary Catchment Area)	43,349	45,129	45,411	45,984	46,447	1,780	4.1%	573	1.3%	1,036	2.3%
Zone 4 - Heckmondwike and Cleckheaton	72,017	74,974	75,442	76,394	77,163	2,957	4.1%	952	1.3%	1,721	2.3%
Zone 8 - Dewsbury	61,930	64,473	64,876	65,694	66,355	2,543	4.1%	818	1.3%	1,480	2.3%
Zone 10 - Outer North and East	132,443	139,335	140,768	143,831	146,645	6,892	5.2%	3,064	2.2%	5,878	4.2%
Total (Study Area)	**309,739**	**323,912**	**326,497**	**331,903**	**336,610**	**14,173**	**4.6%**	**5,407**	**1.7%**	**10,114**	**3.1%**

Notes:

1. Estimate of population within each zone at 2011 sourced from Experian Software
2. Population of each zone projected forward over the period 2011-2031 using ONS 2018-based Sub-National Projections and Mid-Year Estimates and Mid-Year Estimates

Table 2: Available Comparison Goods Expenditure Per Capita 2021-2031 (2019 prices)

	2019	2021	2026	2031	Growth 2019-2021	Growth 2021-2026	Growth 2021-2031
					%	%	%
Zone 9 - Birstall and Batley (Primary Catchment Area)	2359	2179	2435	2736	-7.6%	11.7%	25.6%
Zone 4 - Heckmondwike and Cleckheaton	2901	2679	2994	3365	-7.7%	11.8%	25.6%
Zone 8 - Dewsbury	2246	2075	2319	2606	-7.6%	11.8%	25.6%
Zone 10 - Outer North and East	2949	2724	3044	3422	-7.6%	11.7%	25.6%

Notes:

1. Base comparison goods expenditure per capita at 2019 sourced from Experian Software (in 2019 prices)
2. Deduction made to reflect Special Forms of Trading (SFT) (Experian Briefing Note 18.0 October 2020)
3. Base expenditure projected forward on the Experian's forecast annual growth rates (Experian Briefing Note 18.0 October 2020)

Table 3 : Total Comparison Goods Expenditure Per Capita 2021 - 2031 (2019 prices)

Retail Expenditure Type	2019	2021	2026	2031	Growth 2019-2021	Growth 2021-2026	Growth 2021-2031
					%	%	%
Zone 9 - Birstall and Batley (Primary Catchment Area)	106.459	98.950	111.970	127.078	-7.1%	13.2%	28.4%
Zone 4 - Heckmondwike and Cleckheaton	217.500	202.110	228.724	259.654	-7.1%	13.2%	28.5%
Zone 8 - Dewsbury	144.806	134.617	152.344	172.922	-7.0%	13.2%	28.5%
Zone 10 - Outer North and East	410.900	383.452	437.823	501.821	-6.7%	14.2%	30.9%
Total (Study Area)	**879.666**	**819.129**	**930.862**	**1,061.474**	**-6.9%**	**13.6%**	**29.6%**

Notes:

1. Total available expenditure is the product of applying population forecasts in Table 1 to expenditure per capita forecasts set out in Table 1

Table 4: Comparison Goods Market Shares and Expenditure Flows within the Study Area in 2021 (2019 prices)

Centre/Location	Zone 9 - Birstall and Batley (Primary Catchment Area)		Sub-Total (Other Zones)		Total (Study Area)		Beyond the Study Area	Total Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(£m)
Primary Catchment Area								
Birstall District Centre	4.9%	4.849	2.1%	15.124	2.4%	19.972	2.219	22.191
Batley Town Centre	20.1%	19.889	2.8%	20.165	4.9%	40.054	4.450	44.504
Birstall Shopping Park	22.9%	22.660	16.6%	119.550	17.4%	142.209	60.947	203.156
Mill Discount Village, Batley	0.7%	0.693	1.0%	7.202	1.0%	7.894	0.877	8.772
Other Shops, Zone 9	0.9%	0.891	0.9%	6.482	0.9%	7.372	0.819	8.191
Sub-Total (Primary Catchment Area)	***49.5%***	***48.980***	***23.4%***	***168.522***	***26.6%***	***217.502***	***69.313***	***286.815***
Cleckheaton Town Centre	0.1%	0.099	2.2%	15.844	1.9%	15.943	1.771	17.714
Heckmondwike Town Centre	1.0%	0.990	2.2%	15.844	2.1%	16.833	1.870	18.704
Dewsbury Town Centre	13.2%	13.061	11.5%	82.821	11.7%	95.882	10.654	106.536
Mirfield District Centre	0.0%	0.000	0.9%	6.482	0.8%	6.482	0.720	7.202
Morley Town Centre	1.4%	1.385	2.7%	19.445	2.5%	20.830	2.314	23.145
Asda, Howley Park Road, Morley	5.1%	5.046	2.6%	18.725	2.9%	23.771	4.195	27.966
Other Stores (Zones 4, 8 & 10)	1.0%	0.990	4.3%	30.968	3.9%	31.957	3.551	35.508
Sub-Total (Zones 4, 8 & 10)	***21.8%***	***21.571***	***26.4%***	***190.127***	***25.8%***	***211.698***		
Other Stores (Beyond the Study Area)	***28.7%***	***28.399***	***50.2%***	***361.530***	**47.6%**	***389.928***		
Total	**100.0%**	**98.950**	**100.0%**	**720.179**	**100.0%**	**819.129**		

Notes

1. Expenditure flows based on Kirklees Retail Study Update 2018
2. Total comparison goods expenditure within the Study Area at 2021 sourced from Table 4

Table 5: Comparison Goods Market Shares and Expenditure Flows within the Study Area in 2026 (2019 prices)

Centre/Location	Zone 9 - Birstall and Batley (Primary Catchment Area)		Sub-Total (Other Zones)		Total (Study Area)		Beyond the Study Area	Total Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(£m)
Primary Catchment Area								
Birstall District Centre	4.9%	5.487	2.1%	17.197	2.4%	22.683	2.520	25.204
Batley Town Centre	20.1%	22.506	2.8%	22.929	4.9%	45.435	5.048	50.483
Birstall Shopping Park	22.9%	25.641	16.6%	135.936	17.4%	161.577	69.247	230.824
Mill Discount Village, Batley	0.7%	0.784	1.0%	8.189	1.0%	8.973	0.997	9.970
Other Shops, Zone 9	0.9%	1.008	0.9%	7.370	0.9%	8.378	0.931	9.309
Sub-Total (Primary Catchment Area)	***49.5%***	***55.425***	***23.4%***	***191.621***	***26.5%***	***247.046***	***78.744***	***325.790***
Cleckheaton Town Centre	0.1%	0.112	2.2%	18.016	1.9%	18.128	2.014	20.142
Heckmondwike Town Centre	1.0%	1.120	2.2%	18.016	2.1%	19.135	2.126	21.261
Dewsbury Town Centre	13.2%	14.780	11.5%	94.172	11.7%	108.953	12.106	121.058
Mirfield District Centre	0.0%	0.000	0.9%	7.370	0.8%	7.370	0.819	8.189
Morley Town Centre	1.4%	1.568	2.7%	22.110	2.5%	23.678	2.631	26.308
Asda, Howley Park Road, Morley	5.1%	5.710	2.6%	21.291	2.9%	27.002	4.765	31.767
Other Stores (Zones 4, 8 & 10)	1.0%	1.120	4.3%	35.212	3.9%	36.332	4.037	40.369
Sub-Total (Zones 4, 8 & 10)	***21.8%***	***24.410***	***26.4%***	***216.187***	***25.8%***	***240.597***		
Other Stores (Beyond the Study Area)	***28.7%***	***32.135***	***50.2%***	***411.083***	***47.6%***	***443.219***		
Total	**100.0%**	**111.970**	**100.0%**	**818.891**	**100.0%**	**930.862**		

Notes

1. Expenditure flows based on Kirklees Retail Study Update 2018
2. Total comparison goods expenditure within the Study Area at 2021 sourced from Table 4

Table 6 (a): Forecast Turnover of the Committed Developments in 2026 (2019 prices)

	Kenmore Caravans, Mirfield	Blakeridge Mills, Batley	Total
Gross Floorspace (sqm)	1,837	2,323	4,160
Net Floorspace (all goods) (sqm)	1,254	1,858	3,112
Net Floorspace (comparison goods) (sqm)	251	1,487	1,738
Turnover to Floorspace ratio	8,039	4,526	
Total Turnover £m	**2.016**	**6.729**	**8.745**

Table 6 (b): Forecast Trade Draw of the Committed Developments in 2026 (2019 prices)

	Kenmore Caravans, Mirfield			Blakeridge Mills, Batley			Total		
	Trade Drawn (%)	Trade Drawn (£m)	Penetration Rate (%)	Trade Drawn (%)	Trade Drawn (£m)	Penetration Rate (%)	Trade Drawn (%)	Trade Drawn (£m)	Penetration Rate (%)
Zone 9 - Birstall and Batley (PCA)	2.5%	0.050	0.0%	60.0%	4.037	3.6%	46.7%	4.088	3.7%
Other Zones	87.5%	1.764	0.2%	30.0%	2.019	0.2%	43.3%	3.783	0.5%
Beyond the Study Area	10.0%	0.202		10.0%	0.673		10.0%	0.875	
Total	**100.0%**	**2.016**		**100.0%**	**6.729**		**100.0%**	**8.745**	

Notes

1. Gross and net floorspace details sourced from Planning and Retail Statements prepared to accompany applications
2. Assumes that 20% and 80% of net area for Kenmore Caravans and Blakeridge Mills developments respectively will be used for the sale of comparison goods
3. Turnover to floorspace ratios based on company averages of Aldi and B&M respectively, sourced from Global Data, and allowing for convenience/comparison goods split (for Kenmore Caravans site) and VAT
4. Proportions of trade drawn from within and beyond PCA based on scale, nature and accessibility of existing and proposed provision

Table 7: Comparison Goods Market Shares and Expenditure Flows within the Study Area in 2026 - with Committed Developments (2019 prices)

Centre/Location	Zone 9 - Birstall and Batley (Primary Catchment Area)		Sub-Total (Other Zones)		Total (Study Area)		Beyond the Study Area	Total Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(£m)
Primary Catchment Area								
Committed Developments	**3.7%**	**4.088**	**0.5%**	**3.783**	**0.8%**	**7.871**	**0.875**	**8.745**
Birstall District Centre	4.9%	5.457	2.1%	17.185	2.4%	22.641	2.518	25.159
Batley Town Centre	19.2%	21.530	2.8%	22.802	4.8%	44.332	5.012	49.344
Birstall Shopping Park	22.0%	24.638	16.5%	135.254	17.2%	159.892	68.792	228.684
Mill Discount Village, Batley	0.7%	0.753	1.0%	8.148	1.0%	8.901	0.990	9.891
Other Shops, Zone 9	0.9%	1.002	0.9%	7.365	0.9%	8.367	0.930	9.297
Sub-Total (Primary Catchment Area)	***51.3%***	***57.468***	***23.8%***	***194.536***	***27.1%***	***252.004***	***79.116***	***331.120***
Cleckheaton Town Centre	0.1%	0.109	2.2%	17.954	1.9%	18.063	2.005	20.069
Heckmondwike Town Centre	1.0%	1.082	2.2%	17.939	2.0%	19.021	2.114	21.136
Dewsbury Town Centre	12.7%	14.245	11.4%	93.736	11.6%	107.981	12.032	120.013
Mirfield District Centre	0.0%	0.000	0.9%	7.341	0.8%	7.341	0.815	8.155
Morley Town Centre	1.4%	1.513	2.7%	22.011	2.5%	23.524	2.615	26.139
Asda, Howley Park Road, Morley	5.0%	5.559	2.6%	21.219	2.9%	26.778	4.744	31.522
Other Stores (Zones 4, 8 & 10)	1.0%	1.089	4.3%	35.089	3.9%	36.178	4.018	40.196
Sub-Total (Zones 4, 8 & 10)	***21.1%***	***23.598***	***26.3%***	***215.289***	***25.7%***	***238.886***		
Other Stores (Beyond the Study Area)	***27.6%***	***30.905***	***50.0%***	***409.067***	***47.3%***	***439.972***		
Total	**100.0%**	**111.970**	**100.0%**	**818.891**	**100.0%**	**930.862**		

Notes

1. Expenditure flows take into account trade diversion to existing facilities, based on the scale, nature and accessibility of both existing and proposed facilities
2. Total comparison goods expenditure within the Study Area at 2026 sourced from Table 4

Table 8 (a): Forecast Turnover of the Proposed Development in 2026 (2019 prices)

	Lidl	Home Bargains	Total
Gross Floorspace (sqm)	2,231	2,280	4,511
Net Floorspace (all goods) (sqm)	1,414	2,014	3,428
Net Floorspace (comparison goods) (sqm)	283	1,108	1,391
Turnover to Floorspace ratio	4,888	4,205	
Total Turnover £m	**1.382**	**4.658**	**6.040**

Table 8 (b): Forecast Trade Draw of the Proposed Lidl Foodstore in 2026 (2019 prices)

	Lidl			Home Bargains			Total		
	Trade Drawn (%)	Trade Drawn (£m)	Penetration Rate (%)	Trade Drawn (%)	Trade Drawn (£m)	Penetration Rate (%)	Trade Drawn (%)	Trade drawn (£m)	Penetration Rate (%)
Zone 9 - Birstall and Batley (PCA)	50.0%	0.691	0.6%	40.0%	1.863	1.7%	42.3%	2.554	2.3%
Other Zones	35.0%	0.484	0.1%	40.0%	1.863	0.2%	38.9%	2.347	0.3%
Beyond the Study Area	15.0%	0.207		20.0%	0.932		18.9%	1.139	
Total	**100.0%**	**1.382**		**100.0%**	**4.658**		**100.0%**	**6.040**	

Notes

1. Gross and net floorspace details sourced from Lidl and Home Bargains
2. Assumes that 20% and 55% of net area will be used for the sale of convenience goods for Lidl and Home Bargains respectively
3. Turnover to floorspace ratios sourced from Global Data, allowing for convenience/comparison goods split and VAT
4. Proportions of trade drawn from within and beyond PCA based on scale, nature and accessibility of existing and proposed provision

Table 9: Comparison Goods Market Shares and Expenditure Flows within the Study Area in 2026 - with Committed Aldi and Proposed Lidl Stores (2019 prices)

Centre/Location	Zone 9 - Birstall and Batley (Primary Catchment Area)		Sub-Total (Other Zones)		Total (Study Area)		Beyond the Study Area	Total Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(£m)
Primary Catchment Area								
Proposed Development	**2.3%**	**2.554**	**0.3%**	**2.347**	**0.5%**	**4.901**	**1.139**	**6.040**
Committed Developments	**3.4%**	**3.841**	**0.5%**	**3.753**	**0.8%**	**7.594**	**0.862**	**8.456**
Birstall District Centre	4.8%	5.360	2.1%	17.144	2.4%	22.504	2.508	25.012
Batley Town Centre	18.9%	21.126	2.8%	22.745	4.7%	43.871	4.990	48.860
Birstall Shopping Park	21.5%	24.060	16.5%	134.835	17.1%	158.895	68.419	227.314
Mill Discount Village, Batley	0.7%	0.743	1.0%	8.133	1.0%	8.877	0.987	9.864
Other Shops, Zone 9	0.9%	0.995	0.9%	7.358	0.9%	8.353	0.928	9.282
Sub-Total (Primary Catchment Area)	***52.4%***	***58.679***	***24.0%***	***196.316***	***27.4%***	***254.995***	***79.833***	***334.829***
Cleckheaton Town Centre	0.1%	0.107	2.2%	17.903	1.9%	18.010	1.995	20.005
Heckmondwike Town Centre	0.9%	1.054	2.2%	17.878	2.0%	18.932	2.102	21.034
Dewsbury Town Centre	12.4%	13.911	11.4%	93.445	11.5%	107.356	11.967	119.323
Mirfield District Centre	0.0%	0.000	0.9%	7.328	0.8%	7.328	0.812	8.141
Morley Town Centre	1.3%	1.476	2.7%	21.941	2.5%	23.417	2.601	26.017
Asda, Howley Park Road, Morley	4.8%	5.423	2.6%	21.150	2.9%	26.573	4.717	31.290
Other Stores (Zones 4, 8 & 10)	1.0%	1.071	4.3%	35.011	3.9%	36.081	4.003	40.084
Sub-Total (Zones 4, 8 & 10)	**20.6%**	**23.042**	**26.2%**	**214.656**	**25.5%**	**237.698**		
Other Stores (Beyond the Study Area)	**27.0%**	**30.249**	**49.8%**	**407.919**	**47.1%**	**438.168**		
Total	**100.0%**	**111.970**	**100.0%**	**818.891**	**100.0%**	**930.862**		

Notes

1. Expenditure flows take into account trade diversion to existing facilities, based on the scale, nature and accessibility of both existing and proposed facilities
2. Total comparison goods expenditure within the Study Area at 2026 sourced from Table 4

Table 10: Comparison Goods Market Shares and Expenditure Flows within the Study Area in 2031 - with Committed Aldi and Proposed Lidl Stores (2019 prices)

Centre/Location	Zone 9 - Birstall and Batley (Primary Catchment Area)		Sub-Total (Other Zones)		Total (Study Area)		Beyond the Study Area	Total Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(£m)
Primary Catchment Area								
Proposed Development	**2.3%**	**2.899**	**0.3%**	**2.347**	**0.6%**	**5.246**	**1.219**	**6.465**
Committed Developments	**3.4%**	**4.360**	**0.5%**	**3.753**	**0.9%**	**8.112**	**0.921**	**9.034**
Birstall District Centre	4.8%	6.083	2.1%	17.144	2.5%	23.228	2.588	25.816
Batley Town Centre	18.9%	23.976	2.8%	22.745	4.9%	46.721	5.314	52.035
Birstall Shopping Park	21.5%	27.306	16.5%	134.835	17.1%	162.141	69.817	231.958
Mill Discount Village, Batley	0.7%	0.843	1.0%	8.133	0.9%	8.977	0.999	9.975
Other Shops, Zone 9	0.9%	1.129	0.9%	7.358	0.9%	8.487	0.943	9.431
Sub-Total (Primary Catchment Area)	***52.4%***	***66.597***	***24.0%***	***196.316***	***27.8%***	***262.913***	***81.801***	***344.714***
Cleckheaton Town Centre	0.1%	0.121	2.2%	17.903	1.9%	18.024	1.997	20.021
Heckmondwike Town Centre	0.9%	1.197	2.2%	17.878	2.0%	19.074	2.117	21.192
Dewsbury Town Centre	12.4%	15.788	11.4%	93.445	11.5%	109.233	12.176	121.410
Mirfield District Centre	0.0%	0.000	0.9%	7.328	0.8%	7.328	0.812	8.141
Morley Town Centre	1.3%	1.675	2.7%	21.941	2.5%	23.616	2.623	26.239
Asda, Howley Park Road, Morley	4.8%	6.155	2.6%	21.150	2.9%	27.305	4.847	32.152
Other Stores (Zones 4, 8 & 10)	1.0%	1.215	4.3%	35.011	3.8%	36.226	4.019	40.244
Sub-Total (Zones 4, 8 & 10)	**20.6%**	**26.151**	**26.2%**	**214.656**	**25.5%**	**240.807**		
Other Stores (Beyond the Study Area)	**27.0%**	**34.330**	**49.8%**	**407.919**	**100.0%**	**442.249**		
Total	**100.0%**	**127.078**	**100.0%**	**818.891**	**100.0%**	**945.969**		

Notes

1. Expenditure flows take into account trade diversion to existing facilities, based on the scale, nature and accessibility of both existing and proposed facilities
2. Total comparison goods expenditure within the Study Area at 2031 sourced from Table 4

Table 11: Summary of Comparison Goods Turnovers and Trade Diversions within the Primary Catchment Area (2019 prices)

Centre/Location	Turnover in 2026 - No New Development	Trade Diversion to Committed Developments		Turnover in 2026 - With Committed Developments	Trade Diversion to Proposed Development		Turnover in 2026 - With Proposed Development	Cumulative Trade Diversion		Turnover in 2031 - With Proposed Development
	£m	£m	%	£m	£m	%	£m	£m	%	£m
Proposed Development							**6.040**			**6.465**
Committed Developments				**8.745**	**0.289**	**3.3%**	**8.456**			**9.034**
Birstall District Centre	25.204	0.044	0.2%	25.159	0.147	0.6%	25.012	0.191	0.8%	25.816
Batley Town Centre	50.483	1.140	2.3%	49.344	0.483	1.0%	48.860	1.623	3.2%	52.035
Birstall Shopping Park	230.824	2.141	0.9%	228.684	1.370	0.6%	227.314	3.511	1.5%	231.958
Mill Discount Village, Batley	9.970	0.078	0.8%	9.891	0.027	0.3%	9.864	0.106	1.1%	9.975
Other Shops, Zone 9	9.309	0.012	0.1%	9.297	0.016	0.2%	9.282	0.027	0.3%	9.431
Sub-Total (Primary Catchment Area)	***325.790***	***3.415***		***331.120***	***2.332***		***334.829***	***5.458***		***344.714***
Cleckheaton Town Centre	20.142	0.073	0.4%	20.069	0.063	0.3%	20.005	0.137	0.7%	20.021
Heckmondwike Town Centre	21.261	0.126	0.6%	21.136	0.102	0.5%	21.034	0.228	1.1%	21.192
Dewsbury Town Centre	121.058	1.045	0.9%	120.013	0.690	0.6%	119.323	1.735	1.4%	121.410
Mirfield District Centre	8.189	0.034	0.4%	8.155	0.015	0.2%	8.141	0.048	0.6%	8.141
Morley Town Centre	26.308	0.169	0.6%	26.139	0.122	0.5%	26.017	0.291	1.1%	26.239
Asda, Howley Park Road, Morley	31.767	0.245	0.8%	31.522	0.231	0.7%	31.290	0.476	1.5%	32.152
Other Stores (Zones 4, 8 & 10)	40.369	0.173	0.4%	40.196	0.112	0.3%	40.084	0.285	0.7%	40.244
Sub-Total (Study Area)	***594.884***	***5.279***		***598.350***	***3.667***		***600.723***	***8.658***		***614.112***
Other Stores (Beyond the Study Area)		3.466			2.373			5.839		
Total		**8.745**			**6.040**			**14.786**		

Notes

1. Comparison goods turnovers in 2026 (No New Development) sourced from Table 6
2. Comparison goods turnovers in 2026 (With Committed Developments) sourced from Table 8
3. Comparison goods turnovers in 2026 (With Committed and Proposed Developments) sourced from Table 10
4. Comparison goods turnovers in 2031 (With Committed and Proposed Developments) sourced from Table 11