c p w planning

Retail, Leisure and Town Centre Study: Partial Update 2026

July 2026

prepared for

Colchester City Council

Contents

1. Introduction

1.1 CPW Planning was commissioned by Colchester City Council to prepare a Partial Update to the Retail, Leisure and Town Centre Study 2024 (hereafter the '2024 Study').

1.2 The scope of this Partial Update is limited to an updated assessment of new retail (convenience and comparison goods) floorspace capacity in Colchester, with a base year of 2026 and projections to 2043 so as to cover the emerging plan period.

1.3 This assessment is based on the latest available data inputs and assumptions, although we have used the same catchment area and market share analysis from the household telephone survey that informed the 2024 Study. In reality, market shares are likely to have altered to some extent; however, we do not consider that new evidence is required at this stage but should form part of a more comprehensive update in the future.

1.4 It is also to be noted that Experian's latest expenditure growth rates (derived from the Retail Planner Briefing Note 23 and used for this Partial Update) do not account for the Iran war and the potential ramifications for the UK economy. Our updated assessment of retail floorspace capacity should be understood in that context.

1.5 The remainder of this report is structured as follows:

- **Section 2** describes the basis of our updated retail capacity forecasts; and
- **Section 3** sets out the updated retail capacity forecasts for Colchester.

2. Basis of the Updated Retail Capacity Forecasts

2.1 For the retail capacity forecasting in this Partial Update, we have used the same Excel-based retail capacity model as the 2024 Study. The shopping destinations modelled are shown in Figure 2.1 below.

Figure 2.1 – Shopping destinations modelled

Colchester City Centre
Tollgate
Turner Rise
Peartree Road
Highwoods
Tiptree
Non-central stores in Colchester (modelled as a group)

2.2 No retail capacity forecasts are prescriptive and the further ahead the forecasting year, the less certain the forecasts. Accordingly, the Council should be aware that capacity forecasts beyond five years should be treated with a degree of caution, as they are based on various assumptions and forecasts that can and will change. Forecasting accuracy, even over the next five years, is also uncertain due to changing macro-economic conditions and the potential ramifications of the Iran war.

2.3 The latest available data inputs and assumptions have been applied to the retail capacity model. It is to be noted, however, that this Partial Update is based on a household telephone survey of shopping patterns conducted by NEMS Market Research in July/August 2024. Notwithstanding, we are currently satisfied that the model and its resulting retail capacity forecasts are realistic for the purposes of plan preparation and informing decisions on planning applications.

2.4 Consistent with good retail planning practice, we forecast the expenditure-based capacity for new retail floorspace as follows:

- calculate the total amount of convenience and comparison goods expenditure available within each of the 9 zones comprising the catchment area, at the base and forecasting years (as defined below);
- allocate the available expenditure to the area's shopping destinations based on the results of the 2024 household telephone survey to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission and/or under construction) and assess their likely turnover contribution to future sales; and
- compare the estimated sales in the area's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional convenience and/or comparison goods floorspace (after allowing for any committed developments).

2.5 We describe below the principal data inputs, the scenarios modelled, and the format of the retail capacity tables.

Principle data inputs

Catchment area

2.6 We have adopted the same catchment area (and zones) as the 2024 Study. The catchment area zones are based on postcode geography[1] and extend beyond the Colchester City Council administrative boundary to reflect shopping patterns and expenditure flows.

2.7 A map of the catchment area showing the 9 zones is included at Appendix A.

Base and forecasting years

2.8 As set out previously, we have used 2026 as the base year for our updated retail capacity forecasts. The model therefore provides estimates of current sales in each of the shopping destinations as at 2026.

2.9 We have prepared capacity forecasts at 2031, 2036, 2041 and 2043 (so as to cover the emerging plan period).

Catchment population

2.10 Catchment population data has been supplied in the form of the latest Experian Retail Planner data (dated June 2026) which includes current estimates and the projected future population of each catchment area zone. The result is that, for the catchment area as a whole, the population is expected to increase from 535,032 in 2026 to 595,614 by 2043 (representing an increase of about 11.3%).

Per capita expenditure

2.11 The latest Experian Retail Planner data sets out average per capita expenditure on convenience and comparison goods in each catchment area zone, at the various forecasting years. These estimates and forecasts take account of differences in average per capita expenditure on convenience and comparison goods from zone to zone. The resulting estimates and forecasts of per capita expenditure on both convenience and comparison goods, including expenditure on Special Forms of Trading, are set out in the top half of Table 2 at Appendix B.

2.12 The forecast growth in per capita expenditure in Table 2 is specific to the catchment area. The use of such local growth forecasts is expected to be more reliable than relying on national forecasts. Notwithstanding, they broadly reflect UK-wide trends for retail spending per capita (or per head) as follows[2]:

- ***Convenience goods:*** The Covid-19 pandemic resulted in a substantial +7.2% increase in spend per head in 2020 as consumers, faced with lockdown restrictions, spent more on home cooking/food. Convenience goods spending has fallen in every year since, including -5.1% in 2023; -2.8% in 2024; and -1.5% in 2025. Experian forecasts a fall of -0.5% in 2026. There is expected to be negative 'growth' on a per head basis in the long term, at -0.2% per annum.

- ***Comparison goods:*** Experian's figures show a more mixed picture for comparison goods spending. The lockdown year of 2020 resulted in a -6.2% fall in expenditure per head before recovering in 2021 (+8.1%) and 2022 (+1.5%). However, spending fell considerably in 2023 (-9.4%) due to the cost-of-living crisis; and remained at -0.5% in 2024 and 2025 before rising to 1.2% as forecasted in 2026. Going forward, Experian expects growth to settle at approximately +2.5% per annum.

2.13 As highlighted previously, Experian's latest expenditure growth rates do not account for the Iran war and the potential ramifications for the UK economy. Significantly, interest rates and inflation are now expected to be higher than assumed in the Experian forecasts. Our updated assessment of retail floorspace capacity should be understood in that context.

[1] Refer to Table 1 at Appendix B for details of the relevant postcode sectors.
[2] Sourced from Experian's Retail Planner Briefing Note 23 (published March 2026).

Special Forms of Trading (SFT)

2.14 We have made deductions from the per capita expenditure figures supplied by Experian to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.

2.15 We have applied an SFT deduction of 5.4% for convenience goods expenditure in 2026, increasing to 7.8% by 2043. Our SFT deductions for comparison goods expenditure are much greater; from 26.1% in 2026 to 32% by the end of the forecasting period.

2.16 These deductions are based on Experian's Retail Planner Briefing Note 23 (published March 2026). Whilst the total volume of online retail sales is greater than the percentages assumed within the model, it is necessary to recognise that, with the growth of multi-channel retailing, physical stores can function as showrooms and a source of stock for online-based sales. Therefore, not all online retail sales are 'lost' from the turnover of physical stores and our SFT deductions seek to account for this.

Shopping patterns

2.17 For this Partial Update, we have used the results of the 2024 household telephone survey. The survey covered the area shown on the map in Appendix A which was divided into the 9 catchment area zones shown on that map. Further information on the household telephone survey is included in the 2024 Study.

Visitor expenditure

2.18 For some of the shopping destinations modelled, the 2024 Study made allowances for convenience and comparison goods expenditure by visitors who live outside the catchment area (or 'inflow' expenditure). The same allowances have been made in this Partial Update.

Existing shop floorspace

2.19 We have used the same existing shop floorspace data as the 2024 Study. The latest sales density estimates have been derived from GlobalData insofar as possible.

Shop floorspace commitments and changes

2.20 Officers have supplied details of committed shop floorspace (500 sqm gross or more) in Colchester as well as notable store openings and closures since the 2024 Study.

2.21 The committed developments and other changes we have accounted for in the retail capacity model, and the assumptions we have made, are identified in Figure 2.2 below.

Figure 2.2 – Shop floorspace commitments and changes

Location	Committed developments and other changes	Assumptions for retail capacity modelling
Tollgate	JD Sports has opened in the former Argos unit at Tollgate Centre Shopping Park.	No market share adjustments made for store opening. We assume this new store will not have a material effect on shopping patterns, while some of the JD Sports sales are likely to be diverted from Sports Direct (Tollgate Centre Shopping Park).
	Carpetright (Tollgate Centre Shopping Park) has closed and the unit remains vacant.	No market share adjustments made for store closure. We assume a substantial proportion of the Carpetright sales will be re-distributed to Tapi Carpets (Tollgate Centre Shopping Park) and elsewhere, including other stores at Tollgate. Our retail capacity forecasts assume the unit will be re-occupied as comparison goods floorspace, as shown in Table 21 at Appendix B.
	Homebase (Tollgate West) has closed and the unit remains vacant.	No market share adjustments made for store closure. We assume a substantial proportion of the Homebase sales will be re-distributed to B&Q (Stane Retail Park) and elsewhere, including other stores at Tollgate. Our retail capacity forecasts make no allowance for the re-occupation of this floorspace.
Turner Rise	Poundland (Turner Rise Retail Park) has closed and the unit is now occupied by The Gym Group.	No market share adjustments made for store closure. We assume a substantial proportion of the Poundland sales will be re-distributed to B&M and Home Bargains (Turner Rise Retail Park) and elsewhere, including other stores at Turner Rise.
Non-central stores in Colchester	Home Bargains has opened on Lightship Way following the sub-division of the former B&Q warehouse (planning permission ref. 222681).	No market share adjustments made for store opening. We have treated this as a committed development in the retail capacity model (Table 65 at Appendix B).
	Shoe Zone (Colchester Retail Park) has closed and the unit is now occupied by Greggs and KFC.	No market share adjustments made for store closure. We assume a substantial proportion of the Shoe Zone sales will be re-distributed to Matalan (Colchester Retail Park) and elsewhere, including other 'non-central' shopping destinations in Colchester.

Price basis

2.22 All monetary values in the retail capacity model are based on 2024 prices, unless otherwise stated.

Growth in sales density efficiencies

2.23 We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary.

2.24 We have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period.

Scenarios modelled

2.25 We have assessed the following scenarios for retail floorspace in Colchester:

- **Scenario 1** – the 'baseline' scenario, in which we assume the 2024 pattern of market shares of convenience and comparison goods expenditure in each of the area's shopping destinations – as indicated by the 2024 household telephone survey – remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace (or 'lost' retail floorspace e.g. through redevelopment and/or change of use to non-retail) would not change the market shares of expenditure attracted from the catchment area. This 'constant market share' approach is widely used and accepted for strategic retail capacity forecasting.
- **Scenario 2** – a 'sensitivity' scenario, in which we make adjustments to the 2024 pattern of market shares of convenience goods expenditure (only) to generate more realistic sales densities in some of the shopping destinations modelled. More information on the market share adjustments we have made is set out below.

2.26 The household telephone survey provides a detailed picture of where households in each of the 9 catchment zones do 'most of' their shopping for convenience goods and the different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical within the limitations of the sample to quantify how much households spend, and where and how often. Shopping patterns are too dynamic and unpredictable. Therefore, the results of the household telephone survey do not directly indicate actual expenditure flows but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations.

2.27 However, like all such surveys, this means that its results cannot be applied uncritically in the retail capacity model. Thus for example, in our extensive experience, such surveys (undertaken by ourselves and by other consultants) often tend to over-emphasise shopping in larger centres and stores, and under-represent it in small centres/stores[3]. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres/stores is much less than the probability of interviewing the much larger number of people who use larger centres/stores.

2.28 It is therefore sometimes necessary to make market share adjustments so as to transfer expenditure in the model from one or more locations to others, to balance (or calibrate) the model and make it represent reality more accurately[4] based on our professional judgements.

2.29 Accordingly, we consider using the convenience goods market shares from the 2024 household telephone survey without adjustments would generate an unrealistically high sales density for Highwoods i.e. Tesco Extra and Non-central stores in Colchester. Although we assess the Tesco Extra store and many of the 'non-central' stores are likely to be over-trading, we consider the significant

[3] This is confirmed by the now revoked DCLG 'Practice Guidance' which states, *'Also, surveys that use simple questions about where people shop, provide answers that relate to trips and not spending flows. They can also overstate the importance of the larger centres and stores, and can understate the smaller and less frequently visited stores.'* (Appendix B, paragraph B.34).

[4] There is an approximate correlation between the size of a centre and its average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values).

degree of over-trading indicated by the household telephone survey (as shown under Scenario 1[5]) is unrealistic. Our market share adjustments seek to 'correct' this and re-distribute convenience goods expenditure to other locations (namely Peartree Road[6]). This has involved reducing the survey-indicated convenience goods market shares for both Highwoods and Non-central stores in Colchester by the market share correction factor of 80% (i.e. we have reduced them by 20% from the no-change default factor of 100%) to provide a more realistic sales density; and increasing the market shares for Peartree Road by the market share correction factor of 140% (i.e. we have increased them by 40%).

2.30 No adjustments to the comparison goods market shares have been made.

Format of the retail capacity tables

2.31 Our updated retail capacity tables are included in Appendix B and comprise the following:

- Tables 1 to 5 show the population and expenditure forecasts for the catchment area.
- Tables 6 to 13 are the Scenario 1 tables for Colchester City Centre. Tables 6 and 7 indicate the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the 2024 household telephone survey. Table 8 provides an overview of the pattern of market shares for Colchester City Centre. Table 9 is the product of Tables 5 and 7, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main foodstores and other convenience goods shops in the City Centre, and Table 12 sets out any committed retail developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Colchester City Centre. It also shows (in the bottom row) the overall market shares of catchment area expenditure on convenience and comparison goods attracted by the City Centre.
- Tables 14 to 22 are the Scenario 1 tables for Tollgate. These tables follow the same arrangement as the tables for Colchester City Centre; however, an additional table is included (Table 20) identifying comparison goods floorspace in the existing retail warehouses and foodstores.
- Tables 23 to 31 are the tables for Turner Rise; Tables 32 to 40 are the tables for Peartree Road; and Table 41 to 49 are the tables for Highwoods. These tables relate to Scenario 1 and follow the same arrangement as the tables for Tollgate.
- Tables 50 to 57 are the Scenario 1 tables for Tiptree and follow the same arrangement as the tables for Colchester City Centre.
- Tables 58 to 66 are the Scenario 1 tables for Non-central stores in Colchester and follow the same arrangement as the tables for Tollgate.
- The Scenario 2 tables are Tables 67 to 75 for Peartree Road; Tables 76 to 84 for Highwoods; and Tables 85 to 93 for Non-central stores in Colchester.

[5] Under Scenario 1, Highwoods is achieving a convenience goods sales density of £24,698 per sqm net compared with a benchmark of £14,051 per sqm net; and Non-central stores in Colchester achieve a convenience goods sales density of £18,027 per sqm net compared with a benchmark of £10,476 per sqm net.
[6] We consider the survey-indicated sales density of £1,156 per sqm net is unrealistic for Peartree Road i.e. Co-op (noting Co-op's benchmark sales density is £11,226 per sqm net).

3. Updated Retail Capacity Forecasts

3.1 In this section, we set out and discuss our updated retail capacity forecasts for Colchester.

3.2 We have prepared forecasts for both convenience and comparison goods floorspace in each of the shopping destinations modelled, as shown in Figure 3.1 below. We also set out combined forecasts for Colchester as a whole

Figure 3.1 – Shopping destinations modelled

Colchester City Centre
Tollgate
Turner Rise
Peartree Road
Highwoods
Tiptree
Non-central stores in Colchester (modelled as a group)

3.3 Our forecasts under Scenario 1 are based on the unchanged 2024 pattern of market shares of convenience and comparison goods expenditure; and our Scenario 2 forecasts account for the adjustments we have made to the 2024 pattern of market shares of convenience goods expenditure to generate more realistic sales densities in some of the shopping destinations modelled (namely Highwoods and Non-central stores in Colchester, with expenditure re-distributed to Peartree Road).

3.4 It should once again be highlighted that the capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change. The uncertainty in forecasting long-term retail trends is recognised in the PPG, which states that assessments *'…may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed'* (paragraph 004). Therefore, greater weight should be placed on the capacity forecasts over the next five-year period i.e. to 2031.

Convenience Goods Floorspace

3.5 The updated forecasts in respect of the need for new convenience goods floorspace in Colchester are summarised in Figure 3.2 (Scenario 1) and Figure 3.3 (Scenario 2) below.

3.6 Before we comment on the updated capacity forecasts, we would note that the forecasts are on the assumption that, where existing convenience goods floorspace is shown in the model to be trading above or below average benchmark levels, the sales density will fall or rise to that benchmark level from 2031 onwards. In reality, some stores may continue to trade above or below average benchmark levels.

3.7 The forecasts are also on the assumption that potential new convenience goods floorspace would be delivered in the form of a new foodstore(s) trading at a 'generic' average sales density of £12,000 per sqm net.

Figure 3.2 – Summary of capacity forecasts: convenience goods (sqm net sales area)

Scenario 1	**2031**	**2036**	**2041**	**2043**	Table number (Appendix B)
Colchester City Centre	-1,300	-1,300	-1,250	-1,250	13
Tollgate	-550	-450	-350	-350	22
Turner Rise	-800	-750	-700	-700	31
Peartree Road	-1,050	-1,050	-1,050	-1,050	40
Highwoods	4,050	4,150	4,250	4,300	49
Tiptree	-750	-750	-750	-750	57
Non-central stores in Colchester	6,150	6,350	6,550	6,600	66
Combined forecasts for Colchester	**5,750**	**6,200**	**6,700**	**6,700**	n/a

Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

3.8 Figure 3.2 shows, under Scenario 1, after allowing for committed developments, there will be capacity for convenience goods floorspace in Colchester (all shopping destinations modelled as a whole) amounting to about 5,750 sqm net sales area in 2031.

3.9 The positive capacity identified is focused on Non-central stores in Colchester (about 6,150 sqm net sales area) and Highwoods (about 4,050 sqm net sales area), while the other shopping destinations modelled have a limited theoretical over-supply of convenience goods floorspace from 2031 onwards.

3.10 The substantial capacity forecasted at the Non-central stores in Colchester (modelled as a group) is a signal that many of these stores are likely to be over-trading. However, the Scenario 1 forecasts do not justify new 'non-central' foodstore development or extensions should proposals come forward; rather, the sequential and impact tests should be applied.

3.11 The capacity forecasts further indicate that the Tesco Extra store at Highwoods District Centre is over-trading, although we assess probably not to the degree shown in the retail capacity model (see Table 49 at Appendix B).

3.12 As described previously, we have modelled a 'sensitivity' scenario in which we make adjustments to the 2024 pattern of market shares of convenience goods expenditure to generate more realistic sales densities in some of the shopping destinations modelled (namely Highwoods and Non-central stores in Colchester, with expenditure re-distributed to Peartree Road). The resulting Scenario 2 forecasts are shown in Figure 3.3 below.

3.13 There remains, under Scenario 2, positive capacity for convenience goods floorspace at Non-central stores in Colchester (about 2,950 sqm net sales area) and Highwoods (about 2,050 sqm net sales area) in 2031 – albeit substantially less than forecasted under Scenario 1. Again, the capacity forecasted for Non-central stores in Colchester does not justify new 'non-central' foodstore development or extensions without applying the sequential and impact tests.

3.14 The overall picture for Colchester (all shopping destinations modelled as a whole) under Scenario 2 reveals capacity for about 750 sqm net sales area in 2031, rising to about 1,750 sqm net sales area by the end of the plan period.

Figure 3.3 – Summary of capacity forecasts: convenience goods (sqm net sales area)

Scenario 2	**2031**	**2036**	**2041**	**2043**	Table number (Appendix B)
Peartree Road	-850	-850	-850	-800	75
Highwoods	2,050	2,200	2,250	2,300	84
Non-central stores in Colchester	2,950	3,100	3,250	3,300	93
Combined forecasts for Colchester	**750**	**1,200**	**1,600**	**1,750**	n/a

Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

3.15 Our updated forecasts for convenience goods floorspace in Colchester indicate there is a need to plan for new foodstore provision. An appropriate policy response would consider additional provision in the North Colchester area where there is substantial population growth and a lack of main foodstores at present. In addition, it is assessed the Tesco Extra store at Highwoods District Centre is over-trading; evidence that there is a qualitative need for new foodstore provision in this part of (north) Colchester.

Comparison Goods Floorspace

3.16 Our updated capacity forecasts for comparison goods floorspace in Colchester are summarised in Figure 3.4 below.

Figure 3.4 – Summary of capacity forecasts: comparison goods (sqm net sales area)

Scenario 1	**2031**	**2036**	**2041**	**2043**	Table number (Appendix B)
Colchester City Centre	1,400	3,350	5,050	5,700	13
Tollgate	-8,250	-6,400	-4,800	-4,150	22
Turner Rise	350	800	1,200	1,350	31
Peartree Road	50	150	250	300	40
Highwoods	50	150	200	250	49
Tiptree	50	150	250	300	57
Non-central stores in Colchester	-3,200	-2,850	-2,550	-2,050	66
Combined forecasts for Colchester	**-9,550**	**-4,650**	**-400**	**1,700**	n/a

Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

3.17 Figure 3.4 shows, after allowing for commitment developments and for existing floorspace to become more efficient by 2% per annum, there will be a substantial theoretical over-supply of comparison goods floorspace in Colchester (all shopping destinations modelled as a whole) in 2031, amounting to about -9,550 sqm net sales area. In the longer term, due to positive spending growth as currently forecasted by Experian, capacity for additional comparison goods floorspace is identified and will rise to about 1,700 sqm net sales area by the end of the plan period.

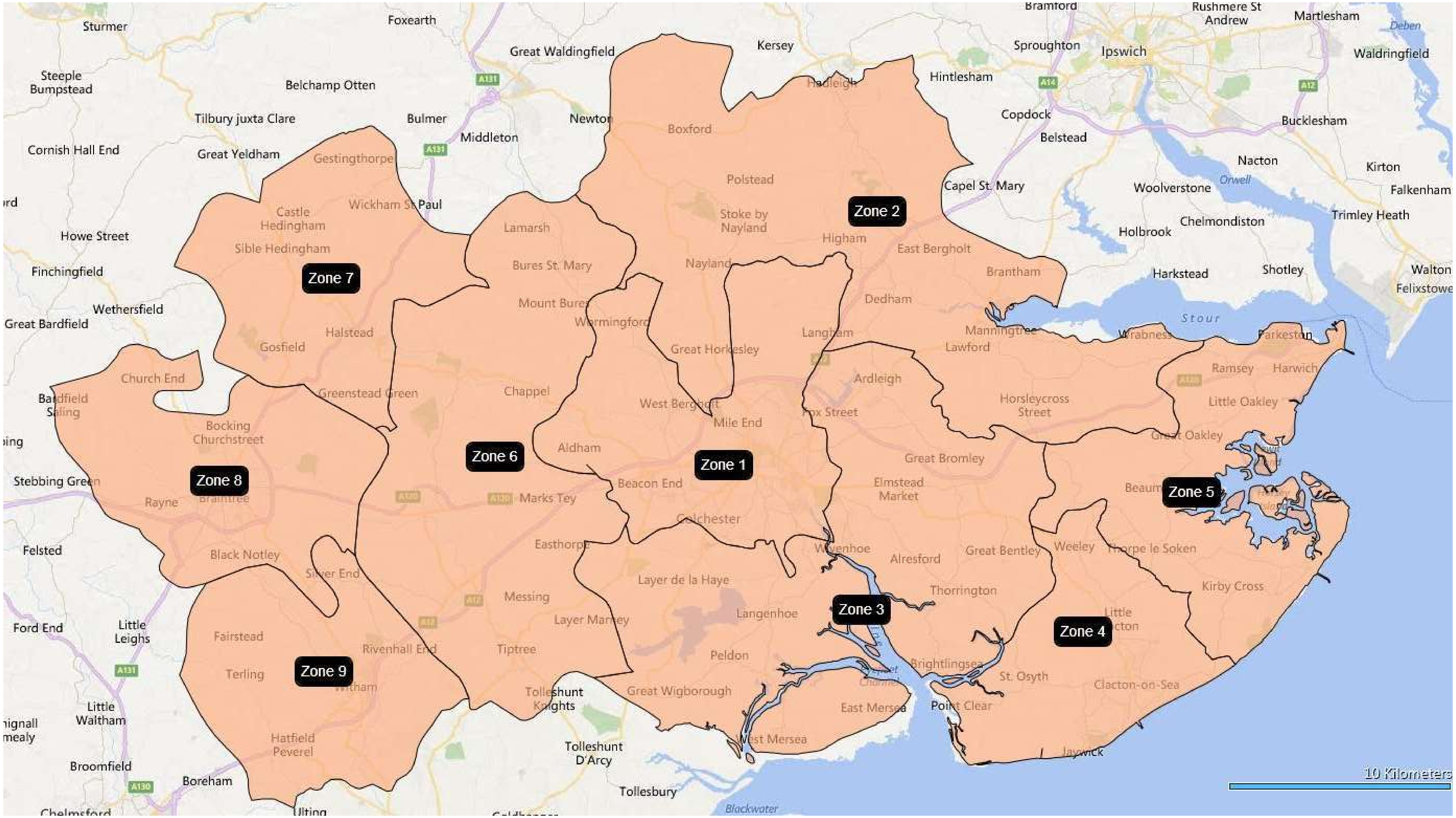
3.18 The most notable 'over-supply' locations are Tollgate (principally due to the Tollgate Village retail development commitment) and Non-central stores in Colchester. Meanwhile, Colchester City Centre is assessed to have capacity for additional comparison goods floorspace (about 1,400 sqm net sales area in 2031), some or all of which could be accommodated within the most 'prime' existing vacant shop floorspace and as part of store refurbishments (e.g. the former M&S store on High Street[7]).

3.19 Based on the foregoing, and noting that longer term capacity forecasts should be treated with a degree of caution as they are based on various assumptions and forecasts than can and will change, we assess there is no quantitative need to plan or allocate sites for new comparison goods floorspace. This further aligns with market trends and a reduction in (comparison goods) retailer demand. There will be scope, however, for existing vacant shop floorspace in Colchester City Centre and other existing centres to accommodate any retailer demand that arises.

[77] Planning permission ref. 242470.

Appendix A

Map of the catchment area


Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
10 Kilometers
Colchester
Ipswich
Felixstowe
Walton
Harwich
Clacton-on-Sea
Brightlingsea
Manningtree
Lawford
Dedham
East Bergholt
Wivenhoe
Tiptree
Halstead
Witham
Rayne
Marks Tey
West Mersea
St. Osyth
Kirby Cross
Tollesbury
Stour
Orwell
Blackwater

Appendix B

Updated retail capacity tables

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year	Forecasting Years			
		2026	2031	2036	2041	2043
1	CO1 1, 2; CO2 7, 8, 9; CO3 0, 3, 4, 8, 9; CO4 0, 3, 5, 6, 9; CO6 3.	155,783	161,684	166,763	171,446	173,288
2	CO6 4, 5; CO7 6; CO10 5; CO11 1, 2; IP7 5.	38,500	40,248	41,762	43,132	43,697
3	CO2 0; CO5 7, 8; CO7 0, 7, 8, 9.	49,558	51,655	53,349	54,902	55,515
4	CO15 1, 2, 3, 4, 5, 6; CO16 7, 8, 9.	70,718	73,983	76,682	78,914	79,748
5	CO12 3, 4, 5; CO13 0, 9; CO14 8; CO16 0.	49,821	52,040	54,175	56,124	56,865
6	CO5 0, 9; CO6 1, 2; CO8 5.	37,686	38,616	39,276	39,793	39,958
7	CO9 1, 2, 3.	24,392	25,018	25,549	26,131	26,337
8	CM7 1, 2, 3, 5, 9; CM77 6, 7, 8.	64,943	66,927	69,016	70,929	71,738
9	CM3 2; CM8 1, 2, 3.	43,631	45,141	46,648	47,923	48,468
TOTAL		535,032	555,312	573,220	589,294	595,614

Source:
Experian Retail Planner Data for the Catchment Area (June 2026).

Table: **2**

CATCHMENT AREA PER CAPITA EXPENDITURE

Price Basis: **2024** Prices

Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS				
	Per Capita Expenditure Including Special Form of Trading					Per Capita Expenditure Including Special Form of Trading				
	Base Year	Forecasting Years				Base Year	Forecasting Years			
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
1	2,771	2,732	2,705	2,681	2,673	3,970	4,453	5,062	5,750	6,041
2	3,216	3,171	3,139	3,111	3,102	4,677	5,245	5,964	6,774	7,117
3	3,080	3,037	3,007	2,980	2,971	4,403	4,938	5,615	6,377	6,700
4	2,942	2,901	2,872	2,847	2,838	3,770	4,228	4,807	5,460	5,736
5	3,002	2,960	2,931	2,904	2,896	3,988	4,473	5,086	5,776	6,069
6	3,097	3,054	3,023	2,996	2,987	4,542	5,094	5,792	6,578	6,911
7	3,007	2,965	2,935	2,909	2,900	4,201	4,711	5,356	6,084	6,392
8	2,896	2,856	2,827	2,802	2,794	4,136	4,638	5,273	5,989	6,292
9	2,931	2,891	2,862	2,836	2,828	4,194	4,703	5,347	6,074	6,381
Catchment Area Average	2,994	2,952	2,922	2,896	2,888	4,209	4,720	5,367	6,096	6,404
Expenditure on Special Forms of Trading (%)*	5.4	6.1	6.8	7.5	7.8	26.1	28.0	29.7	31.4	32.0
	Per Capita Expenditure EXCLUDING* Special Form of Trading					**Per Capita Expenditure EXCLUDING* Special Form of Trading**				
Catchment Zone	Base Year	Forecasting Years				Base Year	Forecasting Years			
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
1	2,621	2,565	2,521	2,480	2,465	2,934	3,206	3,559	3,945	4,108
2	3,042	2,978	2,926	2,878	2,860	3,456	3,776	4,193	4,647	4,840
3	2,914	2,852	2,803	2,757	2,739	3,254	3,555	3,947	4,375	4,556
4	2,783	2,724	2,677	2,633	2,617	2,786	3,044	3,379	3,746	3,900
5	2,840	2,779	2,732	2,686	2,670	2,947	3,221	3,575	3,962	4,127
6	2,930	2,868	2,817	2,771	2,754	3,357	3,668	4,072	4,513	4,699
7	2,845	2,784	2,735	2,691	2,674	3,105	3,392	3,765	4,174	4,347
8	2,740	2,682	2,635	2,592	2,576	3,057	3,339	3,707	4,108	4,279
9	2,773	2,715	2,667	2,623	2,607	3,099	3,386	3,759	4,167	4,339
Catchment Area Average	2,832	2,772	2,724	2,679	2,662	3,110	3,399	3,773	4,182	4,355

Source: Experian Retail Planner Data for the Catchment Area (June 2026) for per capita expenditure.
SFT deductions by CPW Planning with regard to Experian Retail Planner Briefing Note 23 (Appendix 3).

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					**COMPARISON GOODS**				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	408,364	414,776	420,420	425,173	427,069	457,041	518,385	593,440	676,269	711,846
2	117,130	119,841	122,177	124,120	124,975	133,068	151,993	175,095	200,433	211,474
3	144,396	147,307	149,512	151,337	152,070	161,253	183,652	210,587	240,175	252,926
4	196,818	201,533	205,255	207,818	208,671	197,022	225,216	259,133	295,577	311,055
5	141,486	144,642	147,989	150,760	151,836	146,829	167,598	193,700	222,382	234,677
6	110,411	110,739	110,658	110,278	110,045	126,494	141,631	159,923	179,566	187,782
7	69,386	69,653	69,887	70,314	70,420	75,726	84,859	96,199	109,061	114,475
8	177,919	179,484	181,841	183,837	184,802	198,499	223,493	255,837	291,409	306,935
9	120,977	122,542	124,428	125,716	126,376	135,228	152,855	175,347	199,684	210,307
TOTALS	1,486,887	1,510,517	1,532,166	1,549,355	1,556,265	1,631,160	1,849,682	2,119,262	2,414,556	2,541,479

Source: Tables 1 and 2

Table: **4**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2026 for the catchment area as a whole **2024** Prices

	Clothing & footwear	Furniture & floor coverings	Household textiles	Household appliances	Audio-visual & computer equipment	DIY goods & decorating supplies	Chemist's goods, medical & beauty products	All other comparison goods	Total Comparison Goods
Including SFT (£)	1,021	313	132	331	470	362	122	1,458	4,209
Deduction for SFT (%)	31.0	17.0	20.0	31.0	33.0	9.0	9.5	27.5	26.1
Excluding SFT (£)	704	260	106	228	315	329	110	1,057	3,110

Source: Experian Retail Planner Data for the Catchment Area (June 2026) for per capita expenditure.
SFT deductions estimated by CPW Planning.

Table: **5**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2026

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)
1	103,516	38,173	15,517	33,559	46,271	48,404	16,220	155,320
2	30,139	11,114	4,518	9,771	13,472	14,093	4,722	45,221
3	36,522	13,468	5,475	11,840	16,325	17,078	5,723	54,800
4	44,624	16,456	6,689	14,467	19,946	20,866	6,992	66,956
5	33,256	12,263	4,985	10,781	14,865	15,550	5,211	49,898
6	28,650	10,565	4,294	9,288	12,806	13,397	4,489	42,988
7	17,151	6,325	2,571	5,560	7,666	8,020	2,687	25,735
8	44,958	16,579	6,739	14,575	20,096	21,022	7,044	67,457
9	30,628	11,295	4,591	9,929	13,690	14,322	4,799	45,956
TOTALS	369,444	136,237	55,378	119,771	165,138	172,752	57,888	554,330

Source: Tables 1 and 4

Scenario	1
Colchester City Centre	

Table: **6**

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Colchester City Centre

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	8.9	5.7	7.9
2	0.0	0.0	0.0
3	1.3	0.8	1.2
4	0.0	0.0	0.0
5	1.3	0.0	0.9
6	2.4	1.5	2.1
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: **7**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Colchester City Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	59.7	6.7	10.0	5.7	16.8	7.3	41.8	49.9	35.8
2	35.2	2.6	3.8	10.7	4.4	0.8	8.9	22.0	17.4
3	35.0	14.0	9.5	9.8	5.5	9.4	10.9	36.6	24.5
4	18.2	1.3	8.4	1.2	0.0	0.0	0.0	9.6	7.9
5	25.5	15.8	17.0	3.0	1.1	3.0	2.8	13.8	13.1
6	19.6	1.2	11.0	0.0	2.1	2.4	4.5	35.5	17.6
7	2.4	8.7	13.7	6.4	8.6	0.8	1.6	7.5	5.8
8	2.0	0.0	0.0	0.0	0.0	0.0	1.8	3.4	1.7
9	16.7	7.0	1.3	1.5	1.5	0.0	1.5	1.7	5.3

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **8**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Colchester City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	8	8	8	8	8	36	36	36	36	36
2	0	0	0	0	0	17	17	17	17	17
3	1	1	1	1	1	25	25	25	25	25
4	0	0	0	0	0	8	8	8	8	8
5	1	1	1	1	1	13	13	13	13	13
6	2	2	2	2	2	18	18	18	18	18
7	0	0	0	0	0	6	6	6	6	6
8	0	0	0	0	0	2	2	2	2	2
9	0	0	0	0	0	5	5	5	5	5

Sources: CPW Planning for market share corrections.

Table: **9**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Colchester City Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	61,799	2,538	1,555	1,896	7,773	3,533	6,780	77,536
2	10,609	283	173	1,043	591	113	422	9,949
3	12,783	1,886	517	1,165	898	1,612	624	20,035
4	8,122	212	561	174	0	0	0	6,434
5	8,480	1,943	848	327	166	459	147	6,896
6	5,615	128	474	0	274	320	202	15,243
7	418	550	352	356	659	63	43	1,922
8	899	0	0	0	0	0	129	2,300
9	5,115	791	61	152	199	0	73	777
TOTALS	113,840	8,331	4,543	5,112	10,560	6,100	8,420	141,092
MARKET SHARES	30.8%	6.1%	8.2%	4.3%	6.4%	3.5%	14.5%	25.5%

Table: **10**

FORECAST RETAIL SALES

Scenario: 1 Location: **Colchester City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	32,669	33,182	33,634	34,014	34,166	164,535	186,619	213,639	243,457	256,265
2	0	0	0	0	0	22,622	25,839	29,766	34,074	35,951
3	1,444	1,473	1,495	1,513	1,521	40,313	45,913	52,647	60,044	63,232
4	0	0	0	0	0	15,762	18,017	20,731	23,646	24,884
5	1,415	1,446	1,480	1,508	1,518	19,088	21,788	25,181	28,910	30,508
6	2,208	2,215	2,213	2,206	2,201	22,769	25,494	28,786	32,322	33,801
7	0	0	0	0	0	4,544	5,092	5,772	6,544	6,869
8	0	0	0	0	0	3,970	4,470	5,117	5,828	6,139
9	0	0	0	0	0	6,761	7,643	8,767	9,984	10,515
TOTALS	37,736	38,316	38,822	39,240	39,406	300,363	340,873	390,405	444,808	468,163

Table: 11

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Priory Walk)	1,235	95	1,173	12,006	14,086
Tesco Express (High Street)	380	98	372	14,051	5,233
Iceland (St John's Walk)	480	98	470	7,576	3,564
Other convenience goods shops and stores	5,664	85	4,814	6,500	31,293
ALL STORES	7,759		6,830	7,932	54,175

Sources: Retail, Leisure and Town Centre Study 2024. Experian Goad. CPW Planning. GlobalData.

Table: 12

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **13**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Colchester City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	37,736	38,316	38,822	39,240	39,406	300,363	340,873	390,405	444,808	468,163
Plus visitors' spending (%)	-	-	-	-	-	1.0	1.0	1.0	1.0	1.0
Total spending (£000)	37,736	38,316	38,822	39,240	39,406	303,367	344,282	394,309	449,256	472,844
Existing shop floorspace (sq m net)	6,830	6,830	6,830	6,830	6,830	38,039	38,039	38,039	38,039	38,039
Sales per sq m net (£)	5,525	7,932	7,932	7,932	7,932	7,975	8,805	9,722	10,733	11,167
Sales from extg flrspce (£000)	37,736	54,175	54,175	54,175	54,175	303,367	334,941	369,802	408,291	424,786
Available spending to support new shops (£000)	0	-15,859	-15,354	-14,935	-14,770	0	9,341	24,507	40,965	48,058
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-15,859	-15,354	-14,935	-14,770	0	9,341	24,507	40,965	48,058
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,624	7,314	8,075	8,401
Capacity for new shop flrspc (sq m net)	**0**	**-1,322**	**-1,279**	**-1,245**	**-1,231**	**0**	**1,410**	**3,351**	**5,073**	**5,720**

Market Share of Catchment Area Expenditure	2.5%	2.5%	2.5%	2.5%	2.5%	18.4%	18.4%	18.4%	18.4%	18.4%

Sources: Experian Goad for Comparison Goods (ground floor) floorspace plus allowance by CPW Planning for mezzanine/upper floorspace.

Notes:

Scenario	1
Tollgate	

Table: **14**

CONVENIENCE GOODS MARKET SHARES IN 2026

2026 Tollgate			
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	17.7	14.8	16.8
2	2.0	1.4	1.8
3	11.6	2.2	8.8
4	2.1	0.0	1.4
5	0.0	0.0	0.0
6	38.6	12.6	30.8
7	4.8	0.8	3.6
8	0.5	0.0	0.4
9	0.7	0.0	0.5

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: **15**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

	2026 Allocations to **Tollgate** Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	14.6	55.9	19.4	61.1	63.8	57.8	27.3	16.7	32.3
2	4.3	20.3	14.3	30.0	34.3	23.3	2.0	0.0	11.4
3	17.7	39.4	19.4	55.5	61.9	39.0	20.8	7.5	25.7
4	8.1	22.1	8.4	3.0	0.0	0.9	4.2	0.0	4.4
5	6.7	20.8	6.5	14.8	16.7	11.1	3.9	0.0	7.6
6	32.5	54.6	35.4	68.5	74.7	58.7	35.5	21.0	40.3
7	8.3	35.0	14.0	44.6	57.5	18.6	4.5	0.0	16.5
8	5.2	3.2	0.0	21.5	24.1	2.7	9.0	0.0	6.1
9	6.0	10.0	2.7	16.6	20.8	1.8	10.1	0.0	6.1

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **16**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Tollgate**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	17	17	17	17	17	32	32	32	32	32
2	2	2	2	2	2	11	11	11	11	11
3	9	9	9	9	9	26	26	26	26	26
4	1	1	1	1	1	4	4	4	4	4
5	0	0	0	0	0	8	8	8	8	8
6	31	31	31	31	31	40	40	40	40	40
7	4	4	4	4	4	17	17	17	17	17
8	0	0	0	0	0	6	6	6	6	6
9	1	1	1	1	1	6	6	6	6	6

Sources: CPW Planning for market share corrections.

Table: **17**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2026 Sales in **Tollgate** By Comparison Goods Type.							
1	15,082	21,327	3,016	20,488	29,511	27,958	4,428	25,861
2	1,287	2,253	647	2,931	4,619	3,286	96	0
3	6,479	5,309	1,061	6,574	10,100	6,654	1,190	4,088
4	3,632	3,630	561	438	0	177	293	0
5	2,221	2,547	322	1,591	2,475	1,726	203	0
6	9,297	5,771	1,519	6,360	9,571	7,867	1,591	9,023
7	1,430	2,211	360	2,478	4,410	1,489	120	0
8	2,320	527	0	3,132	4,837	563	634	0
9	1,832	1,124	122	1,643	2,845	259	483	0
TOTALS	43,581	44,698	7,608	45,636	68,369	49,980	9,039	38,972
MARKET SHARES	11.8%	32.8%	13.7%	38.1%	41.4%	28.9%	15.6%	7.0%

Table: **18**

FORECAST RETAIL SALES

Scenario: 1 Location: **Tollgate**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	69,422	70,512	71,471	72,279	72,602	146,253	165,883	189,901	216,406	227,791
2	2,343	2,397	2,444	2,482	2,500	14,637	16,719	19,260	22,048	23,262
3	12,996	13,258	13,456	13,620	13,686	41,926	47,750	54,753	62,446	65,761
4	1,968	2,015	2,053	2,078	2,087	7,881	9,009	10,365	11,823	12,442
5	0	0	0	0	0	11,746	13,408	15,496	17,791	18,774
6	34,227	34,329	34,304	34,186	34,114	50,598	56,652	63,969	71,826	75,113
7	2,775	2,786	2,795	2,813	2,817	12,873	14,426	16,354	18,540	19,461
8	0	0	0	0	0	11,910	13,410	15,350	17,485	18,416
9	1,210	1,225	1,244	1,257	1,264	8,114	9,171	10,521	11,981	12,618
TOTALS	124,941	126,522	127,767	128,716	129,069	305,938	346,428	395,969	450,345	473,638

Table: 19

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Western Approach)	10,650	58	6,177	12,006	74,161
Iceland (The Tollgate Centre)	744	98	729	7,576	5,524
Aldi (Stane Retail Park)	1,290	75	968	11,425	11,054
M&S Foodhall (Stane Retail Park)	1,360	100	1,360	11,960	16,266
Other convenience goods shops and stores	320	100	320	6,500	2,080
ALL STORES	14,364		9,554	11,418	109,084

Sources: Retail, Leisure and Town Centre Study 2024. Colchester City Council. CPW Planning. GolbalData.

Table: 20

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
Currys	1,900	1,710		
The Carphone Warehouse [1]	280	252		
Next	1,906	1,715		
Next Home	1,850	1,665		
B&M	1,160	1,044		
Smyths Toys	1,394	1,255		
Hughes	990	891		
Dreams	1,050	945		
AHF (Anglia Home Furnishings)	2,261	2,035		
Sports Direct	1,755	1,580		
Wren Kitchens	910	819		
Oak Furnitureland	1,400	1,260		
Magnet	1,130	1,017		
SCS	1,711	1,540		
Tapi Carpets	647	582		
Boots	540	486		
JD Sports [2]	1,170	1,053		
Hobbycraft	659	593		
B&Q (Stane Retail Park) [3]	11,231	7,581		
Card Factory (Stane Retail Park)	288	259		
Furniture Village (Stane Retail Park)	987	888		
M&S (Stane Retail Park)	n/a	4,041		
Mountain Warehouse (Stane Retail Park)	1,003	903		
Pets Corner (Stane Retail Park)	297	267		
Superdrug (Stane Retail Park)	487	438		
Comparison Goods Floorspace in main foodstores:				
Sainsbury's (Western Approach)	n/a	4,473		
Aldi (Stane Retail Park)	n/a	323		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns (unless otherwise indicated)		39,615		

Sources: Retail, Leisure and Town Centre Study 2024. Edozo Occupiers. Colchester City Council. CPW Planning.

Notes:
(1) Currys concession.
(2) Opened after the date of the household telephone survey.
(3) 10,108 sq m net sales but 25% excluded for trade / non-retail sales.

Table: 21

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Tollgate Village (planning application ref. 211610) [1]	2,100	95	1,995	12,000	23,940
ALL STORES	2,100		1,995		23,940

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Tollgate Village (planning application ref. 211610) [1]	11,000	80	8,800	6,000	52,800
Vacant Retail Warehouse (Former Carpetright, Tollgate Centre Shopping Park)	1,162	90	1,046	4,500	4,706
ALL STORES AND SCHEMES	12,162		9,846		57,506

Sources: Colchester City Council. Edozo Occupiers. CPW Planning.

Notes:
(1) Maximum gross floorspace figures as per conditions 30 and 42 of the planning permission.

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Table: 22

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Tollgate**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	124,941	126,522	127,767	128,716	129,069	305,938	346,428	395,969	450,345	473,638
Plus visitors' spending (%)	-	-	-	-	-	0.5	0.5	0.5	0.5	0.5
Total spending (£000)	124,941	126,522	127,767	128,716	129,069	307,468	348,160	397,949	452,597	476,006
Existing shop floorspace (sq m net)	9,554	9,554	9,554	9,554	9,554	39,615	39,615	39,615	39,615	39,615
Sales per sq m net (£)	13,078	11,418	11,418	11,418	11,418	7,761	8,569	9,461	10,446	10,868
Sales from extg flrspce (£000)	124,941	109,084	109,084	109,084	109,084	307,468	339,469	374,802	413,811	430,529
Available spending to support new shops (£000)	0	17,438	18,683	19,632	19,985	0	8,690	23,148	38,786	45,477
Less sales capacity of committed new floorspace (£000)	0	23,940	23,940	23,940	23,940	0	63,491	70,100	77,396	80,522
Net available spending for new shops (£000)	0	-6,502	-5,257	-4,308	-3,955	0	-54,801	-46,952	-38,610	-35,045
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,624	7,314	8,075	8,401
Capacity for new shop flrspc (sq m net)	**0**	**-542**	**-438**	**-359**	**-330**	**0**	**-8,272**	**-6,420**	**-4,781**	**-4,171**

Market Share of Catchment Area Expenditure	8.4%	8.4%	8.3%	8.3%	8.3%	18.8%	18.7%	18.7%	18.7%	18.6%

Sources:

Notes:

Scenario	1
Turner Rise	

Table: 23

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Turner Rise

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	9.7	11.0	10.1
2	0.7	0.0	0.5
3	1.3	0.0	0.9
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.7	0.0	0.5
7	0.7	0.0	0.5
8	0.0	0.6	0.2
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 24

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Turner Rise
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	5.7	5.1	42.2	11.3	3.9	8.2	3.9	7.5	7.9
2	0.0	1.3	26.8	1.1	0.0	0.0	0.0	3.3	2.2
3	0.0	4.6	49.7	3.9	1.0	1.3	4.9	0.0	2.8
4	0.0	2.6	21.1	0.0	0.0	0.0	0.0	0.0	0.9
5	0.0	1.4	16.0	0.0	0.0	0.8	0.0	0.0	0.7
6	1.3	3.1	22.2	0.0	0.0	0.0	0.9	0.0	1.3
7	0.0	7.0	18.0	0.0	0.0	0.0	0.0	9.6	4.5
8	0.0	3.0	8.4	0.0	0.0	1.6	0.0	0.0	0.7
9	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **25**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Turner Rise**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	10	10	10	10	10	8	8	8	8	8
2	0	0	0	0	0	2	2	2	2	2
3	1	1	1	1	1	3	3	3	3	3
4	0	0	0	0	0	1	1	1	1	1
5	0	0	0	0	0	1	1	1	1	1
6	1	1	1	1	1	1	1	1	1	1
7	0	0	0	0	0	4	4	4	4	4
8	0	0	0	0	0	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: 26

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in Turner Rise By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	5,942	1,928	6,540	3,806	1,805	3,969	624	11,649
2	0	142	1,211	106	0	0	0	1,492
3	0	620	2,719	463	168	220	279	0
4	0	423	1,413	0	0	0	0	0
5	0	174	795	0	0	129	0	0
6	370	325	954	0	0	0	38	0
7	0	441	462	0	0	0	0	2,476
8	0	492	564	0	0	332	0	0
9	0	0	122	0	0	0	0	0
TOTALS	6,311	4,546	14,780	4,374	1,973	4,651	942	15,617
MARKET SHARES	1.7%	3.3%	26.7%	3.7%	1.2%	2.7%	1.6%	2.8%

Table: 27

FORECAST RETAIL SALES

Scenario: 1 Location: Turner Rise

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	COMPARISON GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	40,836	41,478	42,042	42,517	42,707	36,563	41,471	47,475	54,101	56,948
2	0	0	0	0	0	2,661	3,040	3,502	4,009	4,229
3	1,444	1,473	1,495	1,513	1,521	4,838	5,510	6,318	7,205	7,588
4	0	0	0	0	0	1,970	2,252	2,591	2,956	3,111
5	0	0	0	0	0	1,468	1,676	1,937	2,224	2,347
6	1,104	1,107	1,107	1,103	1,100	1,265	1,416	1,599	1,796	1,878
7	0	0	0	0	0	3,029	3,394	3,848	4,362	4,579
8	0	0	0	0	0	1,985	2,235	2,558	2,914	3,069
9	0	0	0	0	0	0	0	0	0	0
TOTALS	43,384	44,058	44,644	45,133	45,328	53,780	60,994	69,829	79,567	83,748

Table: 28

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Asda (Petrolea Close)	6,096	75	4,572	10,519	48,093
Iceland (Petrolea Close)	744	98	729	7,576	5,524
ALL STORES	6,840		5,301	10,114	53,617

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GlobalData.

Table: 29

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
B&M	4,217	3,795		
Home Bargains	1,650	1,485		
Carpets 4 Less	690	621		
Dunelm	3,060	2,754		
Bensons For Beds	1,030	927		
Jollyes Petfood Superstore	490	441		
Comparison Goods Floorspace in main foodstores:				
Asda (Petrolea Close)	n/a	1,524		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		11,547		

Sources: Retail, Leisure and Town Centre Study 2024. Edozo Occupiers. CPW Planning.

Notes:

Table: 30

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **31**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Turner Rise**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	43,384	44,058	44,644	45,133	45,328	53,780	60,994	69,829	79,567	83,748
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	43,384	44,058	44,644	45,133	45,328	53,780	60,994	69,829	79,567	83,748
Existing shop floorspace (sq m net)	5,301	5,301	5,301	5,301	5,301	11,547	11,547	11,547	11,547	11,547
Sales per sq m net (£)	8,184	10,114	10,114	10,114	10,114	4,657	5,142	5,677	6,268	6,521
Sales from extg flrspce (£000)	43,384	53,617	53,617	53,617	53,617	53,780	59,377	65,557	72,380	75,305
Available spending to support new shops (£000)	0	-9,559	-8,973	-8,483	-8,289	0	1,617	4,272	7,187	8,444
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-9,559	-8,973	-8,483	-8,289	0	1,617	4,272	7,187	8,444
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**-797**	**-748**	**-707**	**-691**	**0**	**325**	**779**	**1,187**	**1,340**

Market Share of Catchment Area Expenditure	2.9%	2.9%	2.9%	2.9%	2.9%	3.3%	3.3%	3.3%	3.3%	3.3%

Sources:

Notes:

Scenario 1

Peartree Road

Table: 32

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Peartree Road

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	1.1	0.3
2	0.0	0.0	0.0
3	2.0	0.0	1.4
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	1.5	0.5
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 33

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Peartree Road
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	5.2	2.0	0.0	0.0	0.0	0.0	0.0	0.5
2	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1
3	0.0	11.8	0.0	0.0	0.0	0.0	0.0	4.4	2.5
4	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.4
5	0.0	4.3	2.2	0.0	0.0	0.0	0.0	0.0	0.4
6	0.0	5.5	2.2	1.1	0.0	0.0	0.0	3.2	1.7
7	0.0	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.4
8	0.0	6.1	0.9	0.0	0.0	0.0	0.0	0.0	0.5
9	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.2

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **34**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Peartree Road**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	0	0	0	0	0	1	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0
3	1	1	1	1	1	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	2	2	2	2	2
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **35**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Peartree Road** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	1,985	310	0	0	0	0	0
2	0	142	0	0	0	0	0	0
3	0	1,589	0	0	0	0	0	2,422
4	0	749	0	0	0	0	0	0
5	0	524	107	0	0	0	0	0
6	0	582	93	106	0	0	0	1,363
7	0	305	0	0	0	0	0	0
8	0	1,018	59	0	0	0	0	0
9	0	298	0	0	0	0	0	0
TOTALS	0	7,193	569	106	0	0	0	3,785
MARKET SHARES	0.0%	5.3%	1.0%	0.1%	0.0%	0.0%	0.0%	0.7%

Table: **36**

FORECAST RETAIL SALES

Scenario: 1 Location: **Peartree Road**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	0	0	0	0	0	4,570	5,184	5,934	6,763	7,118
2	0	0	0	0	0	0	0	0	0	0
3	1,444	1,473	1,495	1,513	1,521	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	2,530	2,833	3,198	3,591	3,756
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	1,985	2,235	2,558	2,914	3,069
9	0	0	0	0	0	0	0	0	0	0
TOTALS	1,444	1,473	1,495	1,513	1,521	12,310	13,924	15,903	18,072	19,002

Table: 37

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-Op (Stanway Retail Park)	1,470	85	1,250	11,226	14,027
ALL STORES	1,470		1,250	11,226	14,027

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GolbalData.

Table: 38

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
Poundstretcher	1,110	999		
Barnado's	390	351		
Mattressman	360	324		
Hatfields of Colchester	2,370	2,133		
Hatfields Budget Clearance	2,110	1,899		
Topps Tiles	600	540		
Easy Bathrooms	630	567		
Other comparison goods stores (The Stanway Centre and Angora Business Park)	4,020	3,618		
Comparison Goods Floorspace in main foodstores:				
Co-Op (Stanway Retail Park)	n/a	221		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		10,652		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:

Table: 39

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **40**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Peartree Road**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	1,444	1,473	1,495	1,513	1,521	12,310	13,924	15,903	18,072	19,002
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	1,444	1,473	1,495	1,513	1,521	12,310	13,924	15,903	18,072	19,002
Existing shop floorspace (sq m net)	1,250	1,250	1,250	1,250	1,250	10,652	10,652	10,652	10,652	10,652
Sales per sq m net (£)	1,156	11,226	11,226	11,226	11,226	1,156	1,276	1,409	1,555	1,618
Sales from extg flrspce (£000)	1,444	14,027	14,027	14,027	14,027	12,310	13,592	15,006	16,568	17,237
Available spending to support new shops (£000)	0	-12,554	-12,532	-12,514	-12,506	0	333	897	1,504	1,765
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-12,554	-12,532	-12,514	-12,506	0	333	897	1,504	1,765
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**-1,046**	**-1,044**	**-1,043**	**-1,042**	**0**	**67**	**163**	**248**	**280**

Market Share of Catchment Area Expenditure	0.1%	0.1%	0.1%	0.1%	0.1%	0.8%	0.8%	0.8%	0.7%	0.7%

Sources:

Notes:

Scenario	1
Highwoods	

Table: 41

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Highwoods

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	25.2	17.4	22.8
2	9.7	1.3	7.2
3	5.8	0.0	4.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 42

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to

Highwoods

Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	2.6	2.2	0.0	0.0	0.0	12.2	2.1	1.4
2	2.6	0.0	0.0	2.2	2.3	0.0	8.1	0.0	1.3
3	2.7	0.0	1.0	0.0	0.0	0.0	6.3	4.1	2.3
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.5
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	4.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	1.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: 43

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Highwoods**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	CONVENIENCE GOODS 2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	COMPARISON GOODS 2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	23	23	23	23	23	1	1	1	1	1
2	7	7	7	7	7	1	1	1	1	1
3	4	4	4	4	4	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **44**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Highwoods** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	992	346	0	0	0	1,979	3,184
2	787	0	0	210	309	0	384	0
3	1,001	0	57	0	0	0	361	2,219
4	0	0	0	0	0	0	0	911
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	691	0	102	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
TOTALS	2,479	992	505	210	309	0	2,724	6,314
MARKET SHARES	0.7%	0.7%	0.9%	0.2%	0.2%	0.0%	4.7%	1.1%

Table: **45**

FORECAST RETAIL SALES

Scenario: 1 Location: **Highwoods**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	COMPARISON GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	93,924	95,398	96,696	97,790	98,226	4,570	5,184	5,934	6,763	7,118
2	8,199	8,389	8,552	8,688	8,748	1,331	1,520	1,751	2,004	2,115
3	5,776	5,892	5,980	6,053	6,083	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	757	849	962	1,091	1,145
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
TOTALS	107,899	109,680	111,229	112,532	113,057	9,883	11,225	12,859	14,661	15,436

Table: 46

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Extra (Highwoods Square)	6,241	70	4,369	14,051	61,385
ALL STORES	6,241		4,369	14,051	61,385

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GlobalData.

Table: 47

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)				
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in main foodstore:				
Tesco Extra (Highwoods Square)	n/a	1,872		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		1,872		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:

Table: 48

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **49**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Highwoods**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	107,899	109,680	111,229	112,532	113,057	9,883	11,225	12,859	14,661	15,436
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	107,899	109,680	111,229	112,532	113,057	9,883	11,225	12,859	14,661	15,436
Existing shop floorspace (sq m net)	4,369	4,369	4,369	4,369	4,369	1,872	1,872	1,872	1,872	1,872
Sales per sq m net (£)	24,698	14,051	14,051	14,051	14,051	5,279	5,828	6,435	7,104	7,392
Sales from extg flrspce (£000)	107,899	61,385	61,385	61,385	61,385	9,883	10,912	12,048	13,302	13,839
Available spending to support new shops (£000)	0	48,295	49,845	51,147	51,672	0	313	811	1,359	1,597
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	48,295	49,845	51,147	51,672	0	313	811	1,359	1,597
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**4,025**	**4,154**	**4,262**	**4,306**	**0**	**63**	**148**	**224**	**254**

Market Share of Catchment Area Expenditure	7.3%	7.3%	7.3%	7.3%	7.3%	0.6%	0.6%	0.6%	0.6%	0.6%

Sources:

Notes:

Scenario	1
Tiptree	

Table: 50

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Tiptree

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	1.3	1.3	1.3
3	0.7	0.0	0.5
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	26.3	37.4	29.6
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 51

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Tiptree
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	2.9	1.9	1.4	1.4	0.0	0.0	0.5
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	3.6	6.8	0.0	0.0	12.0	8.8	20.8	9.8	7.6
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	2.4	3.3	0.0	0.0	0.0	0.0	0.3
9	2.1	0.0	0.0	0.0	0.0	0.9	0.0	1.7	1.1

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **52**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Tiptree**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures

Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	0	0	0	0	0	1	1	1	1	1
2	1	1	1	1	1	0	0	0	0	0
3	1	1	1	1	1	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	30	30	30	30	30	8	8	8	8	8
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	1	1	1	1	1

Sources: CPW Planning for market share corrections.

Table: **53**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Tiptree** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	447	628	652	658	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	1,023	717	0	0	1,542	1,176	933	4,213
7	0	0	0	0	0	0	0	0
8	0	0	162	482	0	0	0	0
9	634	0	0	0	0	129	0	777
TOTALS	1,657	717	609	1,110	2,194	1,963	933	4,989
MARKET SHARES	0.4%	0.5%	1.1%	0.9%	1.3%	1.1%	1.6%	0.9%

Table: **54**

FORECAST RETAIL SALES

Scenario: 1 Location: **Tiptree**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	0	0	0	0	0	4,570	5,184	5,934	6,763	7,118
2	1,171	1,198	1,222	1,241	1,250	0	0	0	0	0
3	1,444	1,473	1,495	1,513	1,521	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	33,123	33,222	33,197	33,084	33,013	10,120	11,330	12,794	14,365	15,023
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	1,352	1,529	1,753	1,997	2,103
TOTALS	35,739	35,893	35,914	35,838	35,784	16,042	18,043	20,482	23,125	24,244

Table: 55

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco (Church Road)	2,080	90	1,872	14,051	26,303
Asda (Church Road)	1,386	90	1,247	10,519	13,121
Iceland (The Centre)	416	98	408	7,576	3,089
Other convenience goods shops and stores	378	85	321	6,500	2,087
ALL STORES	4,260		3,848	11,590	44,601

Sources: Retail, Leisure and Town Centre Study 2024. Experian Goad. CPW Planning. GlobalData.

Table: 56

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **57**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Tiptree**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	35,739	35,893	35,914	35,838	35,784	16,042	18,043	20,482	23,125	24,244
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	35,739	35,893	35,914	35,838	35,784	16,042	18,043	20,482	23,125	24,244
Existing shop floorspace (sq m net)	3,848	3,848	3,848	3,848	3,848	2,684	2,684	2,684	2,684	2,684
Sales per sq m net (£)	9,287	11,590	11,590	11,590	11,590	5,978	6,600	7,287	8,045	8,370
Sales from extg flrspce (£000)	35,739	44,601	44,601	44,601	44,601	16,042	17,712	19,555	21,591	22,463
Available spending to support new shops (£000)	0	-8,708	-8,687	-8,763	-8,817	0	331	926	1,534	1,781
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-8,708	-8,687	-8,763	-8,817	0	331	926	1,534	1,781
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**-726**	**-724**	**-730**	**-735**	**0**	**67**	**169**	**253**	**283**

Market Share of Catchment Area Expenditure	2.4%	2.4%	2.3%	2.3%	2.3%	1.0%	1.0%	1.0%	1.0%	1.0%

Sources: Experian Goad for Comparison Goods (ground floor) floorspace.

Notes:

Scenario	1
Non-central stores in Colchester	

Table: 58

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Non-central stores in Colchester

Zones	Main Food Q1	Top-up convenience Q5	WEIGHTED AVERAGE
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	30.2	32.0	30.7
2	5.8	5.0	5.6
3	28.0	15.0	24.1
4	0.0	0.0	0.0
5	1.9	4.5	2.7
6	3.7	0.0	2.6
7	0.0	0.0	0.0
8	1.0	1.1	1.0
9	0.0	1.8	0.5

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 59

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Non-central stores in Colchester
Indicated by Household Interview Survey

Zones	Clothing & footwear Q15	Furniture/ florcvrgs etc Q16	Household Textiles Q17	Household Appliances Q18	Audio-visual equipment Q19	Hardware, DIY, garden products Q20	Chemists, medcl & beauty goods Q21	All other comparison gds Q22	WEIGHTED AVERAGE
	Expenditure weighting								
	704 (%)	260 (%)	106 (%)	228 (%)	315 (%)	329 (%)	110 (%)	1,057 (%)	3,110 (%)
1	6.1	9.5	4.4	4.7	0.0	11.5	0.7	9.0	6.9
2	0.0	4.5	2.0	0.0	0.0	2.0	1.9	1.8	1.3
3	4.6	7.4	3.4	0.0	0.0	5.2	0.7	0.0	2.4
4	0.0	4.6	1.1	0.0	3.3	0.0	0.0	0.0	0.7
5	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
6	5.0	6.8	7.9	0.0	0.0	0.8	0.9	0.0	2.1
7	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	2.3	2.2	3.0	3.1	0.0	0.0	0.0	0.8
9	1.1	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.4

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: **60**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central stores in Colchester**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	31	31	31	31	31	7	7	7	7	7
2	6	6	6	6	6	1	1	1	1	1
3	24	24	24	24	24	2	2	2	2	2
4	0	0	0	0	0	1	1	1	1	1
5	3	3	3	3	3	0	0	0	0	0
6	3	3	3	3	3	2	2	2	2	2
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	1	1	1	1	1
9	1	1	1	1	1	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **61**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Non-central stores in Colchester** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	6,273	3,626	675	1,571	0	5,557	110	13,901
2	0	501	90	0	0	285	88	814
3	1,695	991	187	0	0	888	41	0
4	0	749	72	0	654	0	0	0
5	0	0	54	0	0	0	0	0
6	1,418	717	340	0	0	113	38	0
7	0	0	31	0	0	0	0	0
8	0	378	149	443	623	0	0	0
9	346	149	0	0	0	0	0	0
TOTALS	9,732	7,112	1,597	2,014	1,277	6,842	277	14,715
MARKET SHARES	2.6%	5.2%	2.9%	1.7%	0.8%	4.0%	0.5%	2.7%

Table: **62**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central stores in Colchester**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	126,593	128,580	130,330	131,804	132,391	31,993	36,287	41,541	47,339	49,829
2	7,028	7,190	7,331	7,447	7,499	1,331	1,520	1,751	2,004	2,115
3	34,655	35,354	35,883	36,321	36,497	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	1,970	2,252	2,591	2,956	3,111
5	4,245	4,339	4,440	4,523	4,555	0	0	0	0	0
6	3,312	3,322	3,320	3,308	3,301	2,530	2,833	3,198	3,591	3,756
7	0	0	0	0	0	0	0	0	0	0
8	1,779	1,795	1,818	1,838	1,848	1,985	2,235	2,558	2,914	3,069
9	1,210	1,225	1,244	1,257	1,264	0	0	0	0	0
TOTALS	178,822	181,806	184,366	186,499	187,355	43,034	48,800	55,852	63,608	66,938

Table: 63

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Waitrose (St Andrew's Avenue)	2,672	80	2,138	11,865	25,363
Aldi (Colne View Retail Park)	1,552	75	1,164	11,425	13,299
Aldi (Magdalen Street)	1,614	75	1,211	11,425	13,830
Lidl (St Andrew's Avenue)	1,700	80	1,360	8,260	11,234
Lidl (Gosbecks Road)	1,896	80	1,517	8,260	12,529
Lidl (Abbot's Road)	1,424	80	1,139	8,260	9,410
Co-op (Haven Road)	280	98	274	11,226	3,080
Sainsbury's Local (Layer Road)	260	98	255	12,006	3,059
Tesco Express (Bromley Road)	300	98	294	14,051	4,131
Tesco Express (Crouch Street)	280	98	274	14,051	3,856
Tesco Express (Magdalen Street)	300	98	294	14,051	4,131
ALL STORES	12,278		9,920	10,476	103,921

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GlobalData.

Table: 64

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
DFS (Colne View Retail Park)	1,940	1,746		
Halfords (Colne View Retail Park) [1]	1,140	616		
Pets At Home (Colne View Retail Park)	800	720		
The Range (Cowdray Avenue)	2,630	2,367		
Wickes (Clarendon Way Retail Park) [2]	2,590	1,632		
Matalan (Colchester Retail Park, Sheepen Road)	2,940	2,646		
Go Outdoors (Colchester Retail Park, Sheepen Road) [3]	980	882		
Waitrose (St Andrew's Avenue) comparison goods [3]	n/a	534		
Aldi (stores identified in Table 63) comparison goods [3]	n/a	792		
Lidl (stores identified in Table 63) comparison goods [3]	n/a	1,004		
Cowdray Carpet Centre (Mason Road) [3]	900	810		
Fillpots Garden Centre (Boxted Cross) [3]	n/a	600		
Stanway Garden Centre (London Road) [3]	n/a	600		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		14,948		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:
(1) 1,026 sq m net sales but 40% excluded as non-retail (i.e. motor parts and accessories) sales.
(2) 2,331 sq m net sales but 30% excluded for trade / non-retail sales.
(3) Estimated sales density.

Table: 65

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Home Bargains, Lightship Way (planning application ref. 222681)			907	4,500	4,082
ALL STORES	-		907		4,082

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Home Bargains, Lightship Way (planning application ref. 222681)			3,473	4,500	15,629
ALL STORES AND SCHEMES	-		3,473		15,629

Sources: Colchester City Council. CPW Planning.

Notes:

Table: **66**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central stores in Colchester**

Baseline - Market shares indicated by the Household Interview Survey 2024 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	178,822	181,806	184,366	186,499	187,355	43,034	48,800	55,852	63,608	66,938
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	178,822	181,806	184,366	186,499	187,355	43,034	48,800	55,852	63,608	66,938
Existing shop floorspace (sq m net)	9,920	9,920	9,920	9,920	9,920	14,948	14,948	14,948	14,948	14,948
Sales per sq m net (£)	18,027	10,476	10,476	10,476	10,476	2,879	3,178	3,509	3,875	3,875
Sales from extg flrspce (£000)	178,822	103,921	103,921	103,921	103,921	43,034	47,513	52,458	57,918	57,918
Available spending to support new shops (£000)	0	77,886	80,445	82,578	83,434	0	1,287	3,394	5,690	9,020
Less sales capacity of committed new floorspace (£000)	0	4,082	4,082	4,082	4,082	0	17,255	19,051	21,034	21,884
Net available spending for new shops (£000)	0	73,804	76,364	78,496	79,353	0	-15,968	-15,657	-15,344	-12,863
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**6,150**	**6,364**	**6,541**	**6,613**	**0**	**-3,214**	**-2,854**	**-2,533**	**-2,041**

Market Share of Catchment Area Expenditure	12.0%	12.0%	12.0%	12.0%	12.0%	2.6%	2.6%	2.6%	2.6%	2.6%

Sources:

Notes:

Scenario 2

Peartree Road

Table: 67

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Peartree Road

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	1.1	0.3
2	0.0	0.0	0.0
3	2.0	0.0	1.4
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	1.5	0.5
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 68

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Peartree Road
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	5.2	2.0	0.0	0.0	0.0	0.0	0.0	0.5
2	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1
3	0.0	11.8	0.0	0.0	0.0	0.0	0.0	4.4	2.5
4	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.4
5	0.0	4.3	2.2	0.0	0.0	0.0	0.0	0.0	0.4
6	0.0	5.5	2.2	1.1	0.0	0.0	0.0	3.2	1.7
7	0.0	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.4
8	0.0	6.1	0.9	0.0	0.0	0.0	0.0	0.0	0.5
9	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.2

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: 69

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Peartree Road**

Market shares correction factors: Convenience Goods: 140 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	0	0	0	0	0	1	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0
3	2	2	2	2	2	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	1	1	1	1	1	2	2	2	2	2
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **70**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in **Peartree Road** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	1,985	310	0	0	0	0	0
2	0	142	0	0	0	0	0	0
3	0	1,589	0	0	0	0	0	2,422
4	0	749	0	0	0	0	0	0
5	0	524	107	0	0	0	0	0
6	0	582	93	106	0	0	0	1,363
7	0	305	0	0	0	0	0	0
8	0	1,018	59	0	0	0	0	0
9	0	298	0	0	0	0	0	0
TOTALS	0	7,193	569	106	0	0	0	3,785
MARKET SHARES	0.0%	5.3%	1.0%	0.1%	0.0%	0.0%	0.0%	0.7%

Table: **71**

FORECAST RETAIL SALES

Scenario: 2 Location: **Peartree Road**

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	COMPARISON GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	0	0	0	0	0	4,570	5,184	5,934	6,763	7,118
2	0	0	0	0	0	0	0	0	0	0
3	2,888	2,946	2,990	3,027	3,041	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	1,104	1,107	1,107	1,103	1,100	2,530	2,833	3,198	3,591	3,756
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	1,985	2,235	2,558	2,914	3,069
9	0	0	0	0	0	0	0	0	0	0
TOTALS	3,992	4,054	4,097	4,130	4,142	12,310	13,924	15,903	18,072	19,002

Table: 72

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-Op (Stanway Retail Park)	1,470	85	1,250	11,226	14,027
ALL STORES	1,470		1,250	11,226	14,027

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GolbalData.

Table: 73

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
Poundstretcher	1,110	999		
Barnado's	390	351		
Mattressman	360	324		
Hatfields of Colchester	2,370	2,133		
Hatfields Budget Clearance	2,110	1,899		
Topps Tiles	600	540		
Easy Bathrooms	630	567		
Other comparison goods stores (The Stanway Centre and Angora Business Park)	4,020	3,618		
Comparison Goods Floorspace in main foodstores:				
Co-Op (Stanway Retail Park)	n/a	221		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		10,652		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:

Table: 74

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 75

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Peartree Road**

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	3,992	4,054	4,097	4,130	4,142	12,310	13,924	15,903	18,072	19,002
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	3,992	4,054	4,097	4,130	4,142	12,310	13,924	15,903	18,072	19,002
Existing shop floorspace (sq m net)	1,250	1,250	1,250	1,250	1,250	10,652	10,652	10,652	10,652	10,652
Sales per sq m net (£)	3,195	11,226	11,226	11,226	11,226	1,156	1,276	1,409	1,555	1,618
Sales from extg flrspce (£000)	3,992	14,027	14,027	14,027	14,027	12,310	13,592	15,006	16,568	17,237
Available spending to support new shops (£000)	0	-9,973	-9,930	-9,897	-9,885	0	333	897	1,504	1,765
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-9,973	-9,930	-9,897	-9,885	0	333	897	1,504	1,765
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**-831**	**-828**	**-825**	**-824**	**0**	**67**	**163**	**248**	**280**

Market Share of Catchment Area Expenditure	0.3%	0.3%	0.3%	0.3%	0.3%	0.8%	0.8%	0.8%	0.7%	0.7%

Sources:

Notes:

Scenario	2
Highwoods	

Table: **76**

CONVENIENCE GOODS MARKET SHARES IN 2026

2026 **Highwoods**			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	25.2	17.4	22.8
2	9.7	1.3	7.2
3	5.8	0.0	4.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: **77**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

	2026 Allocations to **Highwoods** Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
Zones	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	2.6	2.2	0.0	0.0	0.0	12.2	2.1	1.4
2	2.6	0.0	0.0	2.2	2.3	0.0	8.1	0.0	1.3
3	2.7	0.0	1.0	0.0	0.0	0.0	6.3	4.1	2.3
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.5
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	4.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	1.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: 78

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	2	Location:	Highwoods							
Market shares correction factors:			Convenience Goods:			80	% of survey indicated figures			
			Comparison Goods:			100	% of survey indicated figures			

Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	18	18	18	18	18	1	1	1	1	1
2	6	6	6	6	6	1	1	1	1	1
3	3	3	3	3	3	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **79**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in Highwoods By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	992	346	0	0	0	1,979	3,184
2	787	0	0	210	309	0	384	0
3	1,001	0	57	0	0	0	361	2,219
4	0	0	0	0	0	0	0	911
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	691	0	102	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
TOTALS	2,479	992	505	210	309	0	2,724	6,314
MARKET SHARES	0.7%	0.7%	0.9%	0.2%	0.2%	0.0%	4.7%	1.1%

Table: **80**

FORECAST RETAIL SALES

Scenario: 2 Location: **Highwoods**

Catchment zone	RETAIL SALES BY CATCHMENT ZONE — CONVENIENCE GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	COMPARISON GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	73,506	74,660	75,676	76,531	76,872	4,570	5,184	5,934	6,763	7,118
2	7,028	7,190	7,331	7,447	7,499	1,331	1,520	1,751	2,004	2,115
3	4,332	4,419	4,485	4,540	4,562	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	757	849	962	1,091	1,145
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
TOTALS	84,865	86,269	87,491	88,518	88,933	9,883	11,225	12,859	14,661	15,436

Table: **81**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Extra (Highwoods Square)	6,241	70	4,369	14,051	61,385
ALL STORES	6,241		4,369	14,051	61,385

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GlobalData.

Table: **82**

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in main foodstore:				
Tesco Extra (Highwoods Square)	n/a	1,872		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		1,872		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:

Table: **83**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 84

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Highwoods**

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	84,865	86,269	87,491	88,518	88,933	9,883	11,225	12,859	14,661	15,436
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	84,865	86,269	87,491	88,518	88,933	9,883	11,225	12,859	14,661	15,436
Existing shop floorspace (sq m net)	4,369	4,369	4,369	4,369	4,369	1,872	1,872	1,872	1,872	1,872
Sales per sq m net (£)	19,426	14,051	14,051	14,051	14,051	5,279	5,828	6,435	7,104	7,392
Sales from extg flrspce (£000)	84,865	61,385	61,385	61,385	61,385	9,883	10,912	12,048	13,302	13,839
Available spending to support new shops (£000)	0	24,885	26,107	27,134	27,548	0	313	811	1,359	1,597
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	24,885	26,107	27,134	27,548	0	313	811	1,359	1,597
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**2,074**	**2,176**	**2,261**	**2,296**	**0**	**63**	**148**	**224**	**254**

Market Share of Catchment Area Expenditure	5.7%	5.7%	5.7%	5.7%	5.7%	0.6%	0.6%	0.6%	0.6%	0.6%

Sources:

Notes:

Scenario 2

Non-central stores in Colchester

Table: 85

CONVENIENCE GOODS MARKET SHARES IN 2026

2026

Non-central stores in Colchester

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	30.2	32.0	30.7
2	5.8	5.0	5.6
3	28.0	15.0	24.1
4	0.0	0.0	0.0
5	1.9	4.5	2.7
6	3.7	0.0	2.6
7	0.0	0.0	0.0
8	1.0	1.1	1.0
9	0.0	1.8	0.5

Sources: Household Telephone Survey 2024.
Expenditure weighting by CPW Planning.

Table: 86

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026

2026 Allocations to
Non-central stores in Colchester
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q15	Q16	Q17	Q18	Q19	Q20	Q21	Q22	
	Expenditure weighting								
	704	260	106	228	315	329	110	1,057	3,110
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	6.1	9.5	4.4	4.7	0.0	11.5	0.7	9.0	6.9
2	0.0	4.5	2.0	0.0	0.0	2.0	1.9	1.8	1.3
3	4.6	7.4	3.4	0.0	0.0	5.2	0.7	0.0	2.4
4	0.0	4.6	1.1	0.0	3.3	0.0	0.0	0.0	0.7
5	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
6	5.0	6.8	7.9	0.0	0.0	0.8	0.9	0.0	2.1
7	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	2.3	2.2	3.0	3.1	0.0	0.0	0.0	0.8
9	1.1	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.4

Sources: Household Telephone Survey 2024.
Table 4 for expenditure weights.

Table: 87

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Non-central stores in Colchester**

Market shares correction factors: Convenience Goods: 80 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)	2026 (%)	2031 (%)	2036 (%)	2041 (%)	2043 (%)
1	25	25	25	25	25	7	7	7	7	7
2	4	4	4	4	4	1	1	1	1	1
3	19	19	19	19	19	2	2	2	2	2
4	0	0	0	0	0	1	1	1	1	1
5	2	2	2	2	2	0	0	0	0	0
6	2	2	2	2	2	2	2	2	2	2
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0

Sources: CPW Planning for market share corrections.

Table: **88**

COMPARISON GOODS SALES BY GOODS TYPE IN 2026

Catchment Zones	2026 Sales in Non-central stores in Colchester By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	6,273	3,626	675	1,571	0	5,557	110	13,901
2	0	501	90	0	0	285	88	814
3	1,695	991	187	0	0	888	41	0
4	0	749	72	0	654	0	0	0
5	0	0	54	0	0	0	0	0
6	1,418	717	340	0	0	113	38	0
7	0	0	31	0	0	0	0	0
8	0	378	149	443	623	0	0	0
9	346	149	0	0	0	0	0	0
TOTALS	9,732	7,112	1,597	2,014	1,277	6,842	277	14,715
MARKET SHARES	2.6%	5.2%	2.9%	1.7%	0.8%	4.0%	0.5%	2.7%

Table: **89**

FORECAST RETAIL SALES

Scenario: 2 Location: **Non-central stores in Colchester**

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)	COMPARISON GOODS 2026 (£000)	2031 (£000)	2036 (£000)	2041 (£000)	2043 (£000)
1	102,091	103,694	105,105	106,293	106,767	31,993	36,287	41,541	47,339	49,829
2	4,685	4,794	4,887	4,965	4,999	1,331	1,520	1,751	2,004	2,115
3	27,435	27,988	28,407	28,754	28,893	3,225	3,673	4,212	4,804	5,059
4	0	0	0	0	0	1,970	2,252	2,591	2,956	3,111
5	2,830	2,893	2,960	3,015	3,037	0	0	0	0	0
6	2,208	2,215	2,213	2,206	2,201	2,530	2,833	3,198	3,591	3,756
7	0	0	0	0	0	0	0	0	0	0
8	1,779	1,795	1,818	1,838	1,848	1,985	2,235	2,558	2,914	3,069
9	0	0	0	0	0	0	0	0	0	0
TOTALS	141,029	143,378	145,391	147,071	147,745	43,034	48,800	55,852	63,608	66,938

Table: 90

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Waitrose (St Andrew's Avenue)	2,672	80	2,138	11,865	25,363
Aldi (Colne View Retail Park)	1,552	75	1,164	11,425	13,299
Aldi (Magdalen Street)	1,614	75	1,211	11,425	13,830
Lidl (St Andrew's Avenue)	1,700	80	1,360	8,260	11,234
Lidl (Gosbecks Road)	1,896	80	1,517	8,260	12,529
Lidl (Abbot's Road)	1,424	80	1,139	8,260	9,410
Co-op (Haven Road)	280	98	274	11,226	3,080
Sainsbury's Local (Layer Road)	260	98	255	12,006	3,059
Tesco Express (Bromley Road)	300	98	294	14,051	4,131
Tesco Express (Crouch Street)	280	98	274	14,051	3,856
Tesco Express (Magdalen Street)	300	98	294	14,051	4,131
ALL STORES	12,278		9,920	10,476	103,921

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning. GlobalData.

Table: 91

EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)		
Comparison Goods Floorspace in stores & warehouses:				
DFS (Colne View Retail Park)	1,940	1,746		
Halfords (Colne View Retail Park) [1]	1,140	616		
Pets At Home (Colne View Retail Park)	800	720		
The Range (Cowdray Avenue)	2,630	2,367		
Wickes (Clarendon Way Retail Park) [2]	2,590	1,632		
Matalan (Colchester Retail Park, Sheepen Road)	2,940	2,646		
Go Outdoors (Colchester Retail Park, Sheepen Road) [3]	980	882		
Waitrose (St Andrew's Avenue) comparison goods [3]	n/a	534		
Aldi (stores identified in Table 63) comparison goods [3]	n/a	792		
Lidl (stores identified in Table 63) comparison goods [3]	n/a	1,004		
Cowdray Carpet Centre (Mason Road) [3]	900	810		
Fillpots Garden Centre (Boxted Cross) [3]	n/a	600		
Stanway Garden Centre (London Road) [3]	n/a	600		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		14,948		

Sources: Retail, Leisure and Town Centre Study 2024. CPW Planning.

Notes:
(1) 1,026 sq m net sales but 40% excluded as non-retail (i.e. motor parts and accessories) sales.
(2) 2,331 sq m net sales but 30% excluded for trade / non-retail sales.
(3) Estimated sales density.

Table: 92

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2026

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Home Bargains, Lightship Way (planning application ref. 222681)			907	4,500	4,082
ALL STORES	-		907		4,082

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Home Bargains, Lightship Way (planning application ref. 222681)			3,473	4,500	15,629
ALL STORES AND SCHEMES	-		3,473		15,629

Sources: Colchester City Council. CPW Planning.

Notes:

Table: 93

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Non-central stores in Colchester**

Growth in sales per sq m from shop floorspace existing in 2026 Comparison Goods: 2.00 % pa 2026 to 2043

	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2031	2036	2041	2043	2026	2031	2036	2041	2043
Residents' Spending £000	141,029	143,378	145,391	147,071	147,745	43,034	48,800	55,852	63,608	66,938
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	141,029	143,378	145,391	147,071	147,745	43,034	48,800	55,852	63,608	66,938
Existing shop floorspace (sq m net)	9,920	9,920	9,920	9,920	9,920	14,948	14,948	14,948	14,948	14,948
Sales per sq m net (£)	14,217	10,476	10,476	10,476	10,476	2,879	3,178	3,509	3,875	3,875
Sales from extg flrspce (£000)	141,029	103,921	103,921	103,921	103,921	43,034	47,513	52,458	57,918	57,918
Available spending to support new shops (£000)	0	39,458	41,470	43,151	43,825	0	1,287	3,394	5,690	9,020
Less sales capacity of committed new floorspace (£000)	0	4,082	4,082	4,082	4,082	0	17,255	19,051	21,034	21,884
Net available spending for new shops (£000)	0	35,376	37,388	39,069	39,743	0	-15,968	-15,657	-15,344	-12,863
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,968	5,485	6,056	6,301
Capacity for new shop flrspc (sq m net)	**0**	**2,948**	**3,116**	**3,256**	**3,312**	**0**	**-3,214**	**-2,854**	**-2,533**	**-2,041**

Market Share of Catchment Area Expenditure	9.5%	9.5%	9.5%	9.5%	9.5%	2.6%	2.6%	2.6%	2.6%	2.6%

Sources:

Notes: