

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study
Nexus Planning

2020 Prices

Table 1a: Population and convenience goods expenditure per capita

	Population				Population Growth	Convenience expenditure per capita (excluding SFT)			
Zone	2022	2025	2030	2035	2022-2035	2022	2025	2030	2035
Zone 1	52,006	53,162	54,820	56,306	8.3%	£2,536	£2,523	£2,518	£2,531
Zone 2	50,008	51,120	52,714	54,143	8.3%	£2,616	£2,603	£2,598	£2,611
Zone 3	125,905	128,705	132,717	136,316	8.3%	£2,523	£2,511	£2,506	£2,518
Zone 4	35,557	36,236	37,172	37,973	6.8%	£2,380	£2,368	£2,364	£2,375
Zone 5	109,230	110,799	112,859	114,468	4.8%	£2,607	£2,594	£2,589	£2,602
Total Study Area	372,706	380,023	390,281	399,206	7.1%				

Notes:

- a. Zones are based on Postcode geography as shown on the plan at Appendix A
- b. Population data is sourced from Experian MMG3 data (2021 report) for 2022, and is projected forward susing NISRA population forecasting (2018-based Population Projections for areas within Northern Ireland), whereby Zone 1, 2 and 3 and have been projected using forecasts for Armagh City, Banbridge And Craigavon BC; Zone 4 has been projected using forecasts for Mid Ulster DC; and Zone 5 has been projected using combined forecasts for Newry, Mourne And Down DC and Lisburn And Castlereagh CC.
- c. Per capita expenditure figures are derived from Experian MMG3 data (2021 report) at 2020 - the 2020 figures are then projected to the assessment years using “Ex. SFT adjusted for sales via stores’ forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 19.

Table 1b: Total convenience goods expenditure available (excluding SFT)

	Convenience expenditure (£m)				Growth (£m)
Zones	2022	2025	2030	2035	2022-2035
Zone 1	£131.9	£134.1	£138.0	£142.5	8.1%
Zone 2	£130.8	£133.1	£137.0	£141.4	8.1%
Zone 3	£317.7	£323.1	£332.6	£343.3	8.1%
Zone 4	£84.6	£85.8	£87.9	£90.2	6.6%
Zone 5	£284.8	£287.4	£292.2	£297.9	4.6%
Total Study Area	£949.9	£963.6	£987.6	£1,015.2	6.9%

Notes:

- a. Figures derived from multiplying per capita expenditure with population within each zone using data provided in Table 1a

Table 1c: Convenience goods expenditure split between main food shopping and top-up food shopping spend (2022) (excluding SFT)

	Convenience expenditure (£m)		
Zones	Main Food	Top-Up	Total
Zone 1	98.9	33.0	131.9
Zone 2	98.1	32.7	130.8
Zone 3	238.3	79.4	317.7
Zone 4	63.5	21.2	84.6
Zone 5	213.6	71.2	284.8
Total Study Area	712.4	237.5	949.9

Notes:

- a. Ratio of main food shopping to top-up food shopping is assumed to be 75:25 in line with Nexus professional judgement, as informed by the results of the NEMS household survey.

Table 2: Convenience goods shopping patterns (excluding SFT)

Destination	Total Main Food (%)	Total Top-up (%)	Total Convenience (%)	Inner Study Area (Zone 1 -3) (%)	Zone 1 Main	Zone 1 Top Up	Zone 2 Main	Zone 2 Top Up	Zone 3 Main	Zone 3 Top Up	Zone 4 Main	Zone 4 Top Up	Zone 5 Main	Zone 5 Top Up
Within ABC BC	62.6%	59.5%	61.8%	92.4%	93.6%	94.5%	93.1%	93.3%	94.0%	84.2%	10.2%	6.7%	14.6%	15.9%
In-Centre	37.3%	25.3%	34.3%	53.4%	80.2%	51.8%	19.7%	40.6%	64.7%	33.3%	7.9%	3.3%	3.8%	3.5%
Armagh CC	8.4%	5.0%	7.5%	11.3%	54.9%	33.8%	0.0%	0.0%	0.0%	0.0%	6.9%	3.3%	0.5%	0.0%
Lidl, Spires Retail Park	2.1%	0.4%	1.6%	2.0%	10.9%	2.6%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.5%	0.0%
Sainsbury, The Mall Shopping Centre	3.1%	0.3%	2.4%	3.7%	21.1%	1.9%	0.0%	0.0%	0.0%	0.0%	1.8%	0.6%	0.0%	0.0%
Armagh CC - Other Stores	3.2%	4.3%	3.5%	5.6%	22.9%	29.3%	0.0%	0.0%	0.0%	0.0%	0.5%	2.7%	0.0%	0.0%
Banbridge TC	2.2%	5.2%	2.9%	4.8%	0.0%	0.0%	15.8%	35.4%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Lidl, Newry Road	2.1%	0.9%	1.8%	3.0%	0.0%	0.0%	15.6%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Banbridge TC - Other Stores	0.0%	4.4%	1.1%	1.8%	0.0%	0.0%	0.3%	29.1%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Craigavon TC	6.2%	2.8%	5.3%	8.7%	8.6%	2.5%	2.2%	0.0%	13.9%	7.3%	0.5%	0.0%	0.0%	0.0%
Tesco, Marlborough Retail Park	5.3%	0.8%	4.2%	6.8%	6.2%	0.0%	2.2%	0.0%	12.2%	2.5%	0.0%	0.0%	0.0%	0.0%
Craigavon TC - Other Stores	0.9%	1.9%	1.2%	1.9%	2.4%	2.5%	0.0%	0.0%	1.7%	4.8%	0.5%	0.0%	0.0%	0.0%
Dromore LTC	0.0%	0.4%	0.1%	0.2%	0.0%	0.0%	0.3%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dromore LTC - Local Stores	0.0%	0.4%	0.1%	0.2%	0.0%	0.0%	0.3%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilford LTC	0.0%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilford LTC - Local Stores	0.0%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.4%	1.1%	0.6%	0.9%	2.7%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC - Local Stores	0.4%	1.1%	0.6%	0.9%	2.7%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	11.6%	4.9%	9.9%	16.2%	0.0%	0.0%	0.9%	0.0%	34.2%	14.7%	0.0%	0.0%	0.0%	0.0%
Tesco, Millennium Way	10.8%	1.1%	8.4%	13.7%	0.0%	0.0%	0.9%	0.0%	32.0%	3.2%	0.0%	0.0%	0.0%	0.0%
Lurgan TC - Other Stores	0.7%	3.9%	1.5%	2.5%	0.0%	0.0%	0.0%	0.0%	2.2%	11.5%	0.0%	0.0%	0.0%	0.0%
Markethill LTC	1.2%	0.8%	1.1%	1.2%	4.5%	5.5%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	1.6%	0.0%
Eurospar, Markethill	1.1%	0.5%	0.9%	0.9%	3.7%	3.5%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	1.6%	0.0%
Markethill LTC - Local Stores	0.1%	0.3%	0.2%	0.3%	0.8%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portadown TC	6.9%	2.1%	5.7%	9.2%	9.5%	1.8%	0.4%	0.5%	16.4%	5.2%	0.5%	0.0%	0.0%	0.0%
Tesco, The Meadows Shopping Centre	4.5%	0.7%	3.6%	5.8%	8.0%	1.8%	0.4%	0.0%	9.9%	1.4%	0.5%	0.0%	0.0%	0.0%
Lidl, High Street Mal	1.6%	0.8%	1.4%	2.3%	1.5%	0.0%	0.0%	0.0%	4.2%	2.4%	0.0%	0.0%	0.0%	0.0%
Portadown TC - Other Stores	0.7%	0.6%	0.7%	1.1%	0.0%	0.0%	0.0%	0.5%	2.2%	1.4%	0.0%	0.0%	0.0%	0.0%
Rathfriland LTC	0.5%	1.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	3.5%
Rathfriland LTC - Local Stores	0.5%	1.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	3.5%
Tandragee LTC	0.0%	1.7%	0.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
Tandragee LTC - Local Stores	0.0%	1.7%	0.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre	25.2%	34.2%	27.5%	39.1%	13.4%	42.7%	73.5%	52.8%	29.3%	50.9%	2.3%	3.3%	10.9%	12.4%
OoC - Armagh	0.3%	1.6%	0.7%	1.1%	2.4%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.3%	1.6%	0.7%	1.1%	2.4%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbrdige	12.8%	3.7%	10.6%	14.4%	0.0%	0.4%	68.5%	26.6%	3.1%	0.0%	1.8%	0.0%	7.4%	0.0%
M&S, Bridgewater Retail Park	0.1%	0.5%	0.2%	0.3%	0.0%	0.4%	0.9%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Bridgewater Retail Park	6.7%	0.9%	5.2%	7.0%	0.0%	0.0%	33.1%	6.4%	2.6%	0.0%	1.8%	0.0%	3.5%	0.0%
Tesco, Castlewellan Road	6.0%	0.6%	4.7%	6.2%	0.0%	0.0%	34.1%	4.1%	0.5%	0.0%	0.0%	0.0%	3.8%	0.0%
OoC - Banbridge - Other Stores	0.0%	1.8%	0.5%	0.8%	0.0%	0.0%	0.3%	13.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon	1.0%	1.3%	1.1%	1.8%	0.3%	0.4%	0.0%	0.0%	2.9%	3.7%	0.0%	0.0%	0.0%	0.0%
Lidl, Northway	1.0%	1.3%	1.1%	1.8%	0.3%	0.4%	0.0%	0.0%	2.9%	3.7%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.5%	2.9%	1.1%	1.7%	0.0%	0.0%	3.5%	15.8%	0.0%	1.4%	0.0%	0.0%	0.0%	0.8%
OoC - Dromore - Other Stores	0.5%	2.9%	1.1%	1.7%	0.0%	0.0%	3.5%	15.8%	0.0%	1.4%	0.0%	0.0%	0.0%	0.8%
OoC - Keady	0.3%	0.8%	0.5%	0.8%	2.5%	5.7%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Keady - Other Stores	0.3%	0.8%	0.5%	0.8%	2.5%	5.7%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	2.5%	5.0%	3.2%	5.2%	0.0%	0.0%	0.3%	0.0%	7.5%	14.8%	0.0%	0.0%	0.0%	0.0%
Lidl, Pinehurst Retail Park	2.2%	0.1%	1.7%	2.7%	0.0%	0.0%	0.3%	0.0%	6.4%	0.3%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.4%	4.9%	1.5%	2.4%	0.0%	0.0%	0.0%	0.0%	1.1%	14.5%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	5.3%	7.7%	5.9%	9.6%	4.7%	3.5%	0.4%	0.0%	13.7%	21.5%	0.5%	0.0%	0.0%	0.0%
Asda, Bridge Street	3.6%	0.8%	2.9%	4.7%	4.2%	0.7%	0.4%	0.0%	8.8%	2.1%	0.0%	0.0%	0.0%	0.0%
Eurospar, Brownstown Road	1.4%	1.2%	1.3%	2.2%	0.0%	0.9%	0.0%	0.0%	4.0%	3.4%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown - Other Stores	0.4%	5.6%	1.7%	2.7%	0.6%	1.9%	0.0%	0.0%	0.8%	16.0%	0.5%	0.0%	0.0%	0.0%
OoC - Rathfriland	1.1%	2.0%	1.3%	0.2%	0.0%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%	3.5%	6.1%
OoC - Rathfriland - Other Stores	1.1%	2.0%	1.3%	0.2%	0.0%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%	3.5%	6.1%
OoC - Other	1.2%	9.2%	3.2%	4.4%	3.5%	20.9%	0.3%	8.5%	2.1%	9.4%	0.0%	3.3%	0.0%	5.5%
OoC - All Other Locations	1.2%	9.2%	3.2%	4.4%	3.5%	20.9%	0.3%	8.5%	2.1%	9.4%	0.0%	3.3%	0.0%	5.5%
Outside of ABC BC	37.4%	40.5%	38.2%	7.6%	6.4%	5.5%	6.9%	6.7%	6.0%	15.8%	89.8%	93.3%	85.4%	84.1%
Ballynahinch	1.7%	1.3%	1.6%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	4.3%
Belfast	1.2%	0.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	4.1%	1.2%
Dungannon	7.4%	4.7%	6.8%	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.5%	82.2%	51.6%	0.0%	0.0%
Lisburn	10.3%	7.8%	9.7%	3.6%	0.9%	0.0%	5.7%	0.9%	4.4%	4.3%	0.0%	0.0%	26.4%	20.9%
Newcastle	1.0%	0.0%	0.7%	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%
Newry	12.9%	12.8%	12.9%	0.8%	3.5%	0.5%	0.0%	1.3%	0.0%	1.0%	0.0%	0.0%	41.4%	40.7%
Other Locations in Northern Ireland	2.8%	12.9%	5.3%	2.5%	0.3%	5.0%	0.6%	4.6%	1.5%	8.3%	7.6%	41.8%	5.0%	17.0%
Republic of Ireland	0.1%	0.5%	0.2%	0.3%	0.9%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

2020 prices

Table 3: Convenience goods expenditure (2022) (£m) (excluding SFT)

Destination	Total Main Food	Total Top-up	Total Convenience	Inner Study Area (Zone 1 -3)	Zone 1 Main	Zone 1 Top Up	Zone 2 Main	Zone 2 Top Up	Zone 3 Main	Zone 3 Top Up	Zone 4 Main	Zone 4 Top Up	Zone 5 Main	Zone 5 Top Up
Within ABC BC	445.7	141.3	587.0	536.6	92.6	31.1	91.4	30.5	224.0	66.9	6.5	1.4	31.2	11.3
In-Centre	265.9	60.0	325.9	309.7	79.4	17.1	19.3	13.3	154.2	26.4	5.0	0.7	8.0	2.5
Armagh CC	59.8	11.8	71.6	65.5	54.3	11.1	0.0	0.0	0.0	0.0	4.4	0.7	1.1	0.0
Lidl, Spires Retail Park	14.7	0.9	15.6	11.6	10.8	0.9	0.0	0.0	0.0	0.0	2.9	0.0	1.1	0.0
Sainsbury, The Mall Shopping Centre	22.0	0.7	22.8	21.5	20.9	0.6	0.0	0.0	0.0	0.0	1.1	0.1	0.0	0.0
Armagh CC - Other Stores	23.0	10.2	33.2	32.3	22.7	9.7	0.0	0.0	0.0	0.0	0.3	0.6	0.0	0.0
Banbridge TC	15.5	12.5	28.0	28.0	0.0	0.0	15.5	11.6	0.0	0.9	0.0	0.0	0.0	0.0
Lidl, Newry Road	15.3	2.1	17.4	17.4	0.0	0.0	15.3	2.1	0.0	0.0	0.0	0.0	0.0	0.0
Banbridge TC - Other Stores	0.3	10.4	10.6	10.6	0.0	0.0	0.3	9.5	0.0	0.9	0.0	0.0	0.0	0.0
Craigavon TC	44.1	6.6	50.7	50.4	8.5	0.8	2.2	0.0	33.1	5.8	0.3	0.0	0.0	0.0
Tesco, Marlborough Retail Park	37.4	2.0	39.4	39.4	6.1	0.0	2.2	0.0	29.1	2.0	0.0	0.0	0.0	0.0
Craigavon TC - Other Stores	6.7	4.6	11.3	11.0	2.4	0.8	0.0	0.0	4.0	3.8	0.3	0.0	0.0	0.0
Dromore LTC	0.3	0.9	1.2	1.2	0.0	0.0	0.3	0.9	0.0	0.0	0.0	0.0	0.0	0.0
Dromore LTC - Local Stores	0.3	0.9	1.2	1.2	0.0	0.0	0.3	0.9	0.0	0.0	0.0	0.0	0.0	0.0
Gilford LTC	0.0	0.6	0.6	0.6	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Gilford LTC - Local Stores	0.0	0.6	0.6	0.6	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	2.6	2.7	5.3	5.3	2.6	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC - Local Stores	2.6	2.7	5.3	5.3	2.6	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	82.4	11.7	94.1	94.1	0.0	0.0	0.9	0.0	81.5	11.7	0.0	0.0	0.0	0.0
Tesco, Millennium Way	77.1	2.5	79.7	79.7	0.0	0.0	0.9	0.0	76.2	2.5	0.0	0.0	0.0	0.0
Lurgan TC - Other Stores	5.3	9.2	14.4	14.4	0.0	0.0	0.0	0.0	5.3	9.2	0.0	0.0	0.0	0.0
Markethill LTC	8.6	1.8	10.4	6.9	4.5	1.8	0.0	0.0	0.6	0.0	0.0	0.0	3.5	0.0
Eurospar, Markethill	7.7	1.2	8.9	5.4	3.6	1.2	0.0	0.0	0.6	0.0	0.0	0.0	3.5	0.0
Markethill LTC - Local Stores	0.8	0.7	1.5	1.5	0.8	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portadown TC	49.1	4.9	54.0	53.6	9.3	0.6	0.4	0.2	39.0	4.1	0.3	0.0	0.0	0.0
Tesco, The Meadows Shopping Centre	32.2	1.7	33.9	33.6	7.9	0.6	0.4	0.0	23.6	1.1	0.3	0.0	0.0	0.0
Lidl, High Street Mal	11.6	1.9	13.5	13.5	1.5	0.0	0.0	0.0	10.1	1.9	0.0	0.0	0.0	0.0
Portadown TC - Other Stores	5.3	1.3	6.6	6.6	0.0	0.0	0.0	0.2	5.3	1.1	0.0	0.0	0.0	0.0
Rathfriland LTC	3.5	2.5	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.5	2.5
Rathfriland LTC - Local Stores	3.5	2.5	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.5	2.5
Tandragee LTC	0.0	4.0	4.0	4.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0
Tandragee LTC - Local Stores	0.0	4.0	4.0	4.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0
Out of Centre	179.8	81.3	261.1	226.9	13.3	14.1	72.1	17.3	69.8	40.4	1.5	0.7	23.2	8.8
OoC - Armagh	2.4	3.9	6.3	6.3	2.4	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	2.4	3.9	6.3	6.3	2.4	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbrdige	91.5	8.8	100.3	83.4	0.0	0.1	67.2	8.7	7.4	0.0	1.2	0.0	15.8	0.0
M&S, Bridgewater Retail Park	0.9	1.1	2.0	2.0	0.0	0.1	0.9	1.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco, Bridgewater Retail Park	47.4	2.1	49.5	40.8	0.0	0.0	32.5	2.1	6.2	0.0	1.2	0.0	7.6	0.0
Tesco, Castlewellan Road	42.9	1.4	44.2	36.1	0.0	0.0	33.5	1.4	1.2	0.0	0.0	0.0	8.2	0.0
OoC - Banbridge - Other Stores	0.3	4.3	4.6	4.6	0.0	0.0	0.3	4.3	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon	7.2	3.0	10.3	10.3	0.3	0.1	0.0	0.0	7.0	2.9	0.0	0.0	0.0	0.0
Lidl, Northway	7.2	3.0	10.3	10.3	0.3	0.1	0.0	0.0	7.0	2.9	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	3.4	6.9	10.3	9.7	0.0	0.0	3.4	5.2	0.0	1.1	0.0	0.0	0.0	0.6
OoC - Dromore - Other Stores	3.4	6.9	10.3	9.7	0.0	0.0	3.4	5.2	0.0	1.1	0.0	0.0	0.0	0.6
OoC - Keady	2.4	2.0	4.4	4.4	2.4	1.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Keady - Other Stores	2.4	2.0	4.4	4.4	2.4	1.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	18.1	11.8	29.9	29.9	0.0	0.0	0.3	0.0	17.9	11.8	0.0	0.0	0.0	0.0
Lidl, Pinehurst Retail Park	15.5	0.3	15.8	15.8	0.0	0.0	0.3	0.0	15.2	0.3	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	2.6	11.5	14.2	14.2	0.0	0.0	0.0	0.0	2.6	11.5	0.0	0.0	0.0	0.0
OoC - Portadown	38.1	18.2	56.3	56.0	4.7	1.1	0.4	0.0	32.7	17.1	0.3	0.0	0.0	0.0
Asda, Bridge Street	25.5	1.9	27.5	27.5	4.1	0.2	0.4	0.0	21.0	1.7	0.0	0.0	0.0	0.0
Eurospar, Brownstown Road	9.6	3.0	12.6	12.6	0.0	0.3	0.0	0.0	9.6	2.7	0.0	0.0	0.0	0.0
OoC - Portadown - Other Stores	2.9	13.4	16.3	15.9	0.6	0.6	0.0	0.0	2.0	12.7	0.3	0.0	0.0	0.0
OoC - Rathfriland	8.0	4.8	12.8	1.0	0.0	0.0	0.5	0.5	0.0	0.0	0.0	0.0	7.4	4.3
OoC - Rathfriland - Other Stores	8.0	4.8	12.8	1.0	0.0	0.0	0.5	0.5	0.0	0.0	0.0	0.0	7.4	4.3
OoC - Other	8.6	21.8	30.4	25.8	3.5	6.9	0.3	2.8	4.9	7.5	0.0	0.7	0.0	3.9
OoC - All Other Locations	8.6	21.8	30.4	25.8	3.5	6.9	0.3	2.8	4.9	7.5	0.0	0.7	0.0	3.9
Outside of ABC BC	266.7	96.2	362.9	43.9	6.3	1.8	6.8	2.2	14.2	12.5	57.0	19.8	182.4	59.9
Ballynahinch	12.1	3.1	15.1	0.3	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	11.8	3.1
Belfast	8.8	1.1	9.9	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	8.8	0.8
Dungannon	52.9	11.3	64.1	1.0	0.7	0.0	0.0	0.0	0.0	0.4	52.2	10.9	0.0	0.0
Lisburn	73.3	18.6	91.9	20.7	0.9	0.0	5.5	0.3	10.6	3.4	0.0	0.0	56.3	14.9
Newcastle	6.9	0.0	6.9	0.4	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	6.5	0.0
Newry	91.9	30.4	122.3	4.9	3.5	0.2	0.0	0.4	0.0	0.8	0.0	0.0	88.4	29.0
Other Locations in Northern Ireland	19.9	30.7	50.7	14.3	0.3	1.7	0.5	1.5	3.7	6.6	4.8	8.8	10.6	12.1
Republic of Ireland	0.9	1.1	2.0	2.0	0.9	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0
Total	712.4	237.5	949.9	580.4	98.9	33.0	98.1	32.7	238.3	79.4	63.5	21.2	213.6	71.2

Note: Figures may not add up due to rounding

Table 4: Convenience goods benchmark (2022)

Destination	Gross Retail Floorspace (sq m)	Net Sales Area (sq m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq m)	Benchmark Turnover (£m)	Survey Turnover (£m)	With 2% Inflow from Beyond Study Area (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Within ABC BC	-	-	-	-	634.0	587.0	598.8	-35.2	-5.6%
In-Centre	-	-	-	-	323.9	325.9	332.4	8.5	2.6%
Armagh CC	-	-	-	-	67.9	71.6	73.0	5.1	7.5%
Lidl, Spires Retail Park	1233.3	1109.9	871.9	8738.5	7.6	15.6	15.9	8.3	108.8%
Sainsbury, The Mall Shopping Centre	3716.0	3344.4	2168.6	12479.4	27.1	22.8	23.2	-3.8	-14.2%
Armagh CC - Other Stores	-	-	-	-`	33.2	33.2	33.9	0.7	2.0%
Banbridge TC	-	-	-	-	31.0	28.0	28.6	-2.4	-7.9%
Lidl, Newry Road	2225.9	2003.3	1573.8	12940.3	20.4	17.4	17.7	-2.7	-13.0%
Banbridge TC - Other Stores	-	-	-	-	10.6	10.6	10.9	0.2	2.0%
Craigavon TC	-	-	-	-	73.6	50.7	51.7	-21.9	-29.7%
Tesco, Marlborough Retail Park	10883.0	6564.0	4428.2	14072.0	62.3	39.4	40.2	-22.1	-35.5%
Craigavon TC - Other Stores	-	-	-	-	11.3	11.3	11.5	0.2	2.0%
Dromore LTC	-	-	-	-	1.2	1.2	1.2	0.0	2.0%
Dromore LTC - Local Stores	-	-	-	-	1.2	1.2	1.2	0.0	2.0%
Gilford LTC	-	-	-	-	0.6	0.6	0.6	0.0	2.0%
Gilford LTC - Local Stores	-	-	-	-	0.6	0.6	0.6	0.0	2.0%
Keady LTC	-	-	-	-	5.3	5.3	5.4	0.1	2.0%
Keady LTC - Local Stores	-	-	-	-	5.3	5.3	5.4	0.1	2.0%
Lurgan TC	-	-	-	-	57.2	94.1	96.0	38.8	67.8%
Tesco, Millennium Way	5006.0	4505.4	3039.5	14072.0	42.8	79.7	81.3	38.5	90.0%
Lurgan TC - Other Stores	-	-	-	-	14.4	14.4	14.7	0.3	2.0%
Markethill LTC	-	-	-	-	10.4	10.4	10.6	0.2	2.0%
Eurospar, Markethill	-	-	-	-	8.9	8.9	9.1	0.2	2.0%
Markethill LTC - Local Stores	-	-	-	-	1.5	1.5	1.5	0.0	2.0%
Portadown TC	-	-	-	-	66.7	54.0	55.0	-11.6	-17.5%
Tesco, The Meadows Shopping Centre	5406.0	4865.4	3282.3	14072.0	46.2	33.9	34.6	-11.6	-25.1%
Lidl, High Street Mall	2252.2	2027.0	1592.3	8738.5	13.9	13.5	13.7	-0.2	-1.2%
Portadown TC - Other Stores	-	-	-	-	6.6	6.6	6.7	0.1	2.0%
Rathfriland LTC	-	-	-	-	6.0	6.0	6.1	0.1	2.0%
Rathfriland LTC - Local Stores	-	-	-	-	6.0	6.0	6.1	0.1	2.0%
Tandragee LTC	-	-	-	-	4.0	4.0	4.1	0.1	2.0%
Tandragee LTC - Local Stores	-	-	-	-	4.0	4.0	4.1	0.1	2.0%
Out of Centre	-	-	-	-	310.0	261.1	266.3	-43.7	-14.1%
OoC - Armagh	-	-	-	-	6.3	6.3	6.4	0.1	2.0%
OoC - Armagh - Other Stores	-	-	-	-	6.3	6.3	6.4	0.1	2.0%
OoC - Banbrdige	-	-	-	-	131.4	100.3	102.3	-29.1	-22.2%
M&S, Bridgewater Retail Park	1858.0	1301.0	1178.5	11092.2	13.1	2.0	2.0	-11.1	-84.6%
Tesco, Bridgewater Retail Park	8167.7	7350.9	4959.1	14072.0	69.8	49.5	50.5	-19.3	-27.6%
Tesco, Castlewellan Road	5151.5	4636.3	3127.8	14072.0	44.0	44.2	45.1	1.1	2.5%
OoC - Banbridge - Other Stores	-	-	-	-	4.6	4.6	4.7	0.1	2.0%
OoC - Craigavon	-	-	-	-	10.1	10.3	10.5	0.4	4.1%
Lidl, Northway	1630.0	1467.0	1152.4	8738.5	10.1	10.3	10.5	0.4	4.1%
OoC - Craigavon - Other Stores	-	-	-	-	0.0	0.0	0.0	0.0	0.0%
OoC - Dromore	-	-	-	-	10.3	10.3	10.5	0.2	2.0%
OoC - Dromore - Other Stores	-	-	-	-	10.3	10.3	10.5	0.2	2.0%
OoC - Keady	-	-	-	-	4.4	4.4	4.5	0.1	2.0%
OoC - Keady - Other Stores	-	-	-	-	4.4	4.4	4.5	0.1	2.0%
OoC - Lurgan	-	-	-	-	27.2	29.9	30.5	3.3	12.1%
Lidl, Pinehurst Retail Park	2114.0	1902.6	1494.6	8738.5	13.1	15.8	16.1	3.0	23.0%
OoC - Lurgan - Other Stores	-	-	-	-	14.2	14.2	14.5	0.3	2.0%
OoC - Portadown	-	-	-	-	77.0	56.3	57.4	-19.6	-25.4%
Asda, Bridge Street	6204.1	5583.7	3379.7	14245.2	48.1	27.5	28.0	-20.1	-41.8%
Eurospar, Brownstown Road	-	-	-	-	12.6	12.6	12.9	0.3	2.0%
OoC - Portadown - Other Stores	-	-	-	-	16.3	16.3	16.6	0.3	2.0%
OoC - Rathfriland	-	-	-	-	12.8	12.8	13.1	0.3	2.0%
OoC - Rathfriland - Other Stores	-	-	-	-	12.8	12.8	13.1	0.3	2.0%
OoC - Other	-	-	-	-	30.4	30.4	31.0	0.6	2.0%
OoC - All Other Locations	-	-	-	-	30.4	30.4	31.0	0.6	2.0%

Notes:

a. Due to the level of data available, the benchmarking exercise is informed by research collected in relation to the larger national supermarkets only (namely Tesco, Sainsbury, Asda, M&S and Lidl).

b. For all stores bar M&S, Bridgewater Retail Park and Tesco, Marlborough Retail Park, the gross retail floorspace has been sourced from Department of Finance's Non-Domestic Valuation List - it is assumed that the gross retail floorspace is equal to the floor-category "Shop" and hence excludes floor-categories such as "Cafe", "Storage" and "Office". For M&S, Bridgewater Retail Park the gross floorspace area has been taken from Planning Decision LA08/2021/1069/F; for Tesco, Marlborough Retail Park the gross floorspace area has been taken from Planning Decision LA08/2019/1269/F.

b. For all stores bar M&S, Bridgewater Retail Park and Tesco, Marlborough Retail Park, the net sales area is derived from the gross floorspace figure whereby (based on Nexus Planning professional judgement) the net sales area is assumed to be 90% of the gross retail floorspace figure. For M&S, Bridgewater Retail Park the net sales area has been taken from Planning Decision LA08/2021/1069/F; for Tesco, Marlborough Retail Park the net sales area has been taken from Planning Decision LA08/2019/1269/F.

c. The the proportion of net floorspace dedicated to convenience goods sales is taken from the company benchmark average (sourced from GlobalData 2021).

d. The average sales density has been sourced from GlobalData 2021.

e. The benchmark convenience turnover is calculated by multiplying the sales area by the sales density. It is assumed that all other stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey).

f. Survey derived performance of stores is sourced from Table 3

Figures may not add up due to rounding
 2020 prices

Table 5a: Convenience goods market share derived turnover (based on household survey results)

	% Market Share	2022 Survey Turnover (£m)	2025 Survey Turnover (£m)	2030 Survey Turnover (£m)	2035 Survey Turnover (£m)
TOTAL Study Area (£m)		949.9	963.6	987.6	1015.2
Armagh Built-Up Area	8.2%	77.9	79.0	81.0	83.3
Banbridge Built-Up Area	13.5%	128.3	130.2	133.4	137.1
Craigavon Built-Up Area	6.4%	61.0	61.9	63.4	65.2
Lurgan Built-Up Area	13.1%	124.0	125.8	129.0	132.6
Portadown Built-Up Area	11.6%	110.3	111.9	114.7	117.9
Other Areas in ABC BC	9.0%	85.5	86.7	88.9	91.3
ABC BC	61.8%	587.0	595.5	610.3	627.4

Notes:
a. Market Share percentage figures are derived from Table 2. This is then applied to the total convenience goods expenditure available (excluding SFT) as taken from Table 1b

Table 5b: Convenience goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2022 Turnover with Inflow (£m)	2025 Turnover with Inflow (£m)	2030 Turnover with Inflow (£m)	2035 Turnover with Inflow (£m)
Armagh Built-Up Area	2.0%	79.5	80.6	82.6	84.9
Banbridge Built-Up Area	2.0%	130.9	132.8	136.1	139.9
Craigavon Built-Up Area	2.0%	62.2	63.1	64.7	66.5
Lurgan Built-Up Area	2.0%	126.5	128.4	131.6	135.2
Portadown Built-Up Area	2.0%	112.5	114.1	117.0	120.2
Other Areas in ABC BC	2.0%	87.2	88.4	90.6	93.2
ABC BC		598.7	607.4	622.5	639.9

Notes:
a. The inflow figures have been estimated by Nexus. This is then applied to the survey turnover as presented in Table 5a.

Table 5c: Benchmark Turnovers (£m)

		2022 Benchmark Turnover (£m)	2025 Benchmark Turnover (£m)	2030 Benchmark Turnover (£m)	2035 Benchmark Turnover (£m)
Armagh Built-Up Area		74.2	75.6	75.8	75.8
Banbridge Built-Up Area		162.5	165.4	165.9	165.9
Craigavon Built-Up Area		83.7	85.2	85.4	85.4
Lurgan Built-Up Area		84.4	86.0	86.2	86.2
Portadown Built-Up Area		143.7	146.3	146.7	146.7
Other Areas in ABC BC		85.5	87.0	87.3	87.3
ABC BC		634.0	645.4	647.3	647.3

Notes:
a. Benchmark turnover figure at 2022 is sourced from Table 4. It is then "grown" to the respective years using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 19.

Table 5d: Extant convenience goods commitments

Site Address	Location	Application Reference	Summary of the Proposal	Net* Convenience Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2022	Estimated Convenience Turnover (£ m) - 2022	Estimated Convenience Turnover (£ m) - 2025	Estimated Convenience Turnover (£ m) 2030	Estimated Convenience Turnover (£ m) 2035
Lands adjacent to College Street and Lonsdale Road adjacent to nort-west of the hall at no.12 College street and opposite nos 7 - 25 College Street and Armagh Court House. Armagh	Armagh Built-Up Area	LA08/2020/1565/F	Home Bargains	358	8000	2.9	2.9	2.9	2.9
Lands north of Millennium Way and South of Shaerf Drive, Lurgan.	Lurgan Built-Up Area	LA08/2018/1641/F	Home Bargains	975	8000	7.8	7.9	8.0	8.0
Bridgewater Retail Park, Banbridge	Banbridge Built-Up Area	LA08/2021/1069/F	1 Retail Warehouse Unit (Bulky Goods)	986	8000	7.9	8.0	8.1	8.1
Armagh Built-Up Area						2.9	2.9	2.9	2.9
Banbridge Built-Up Area						7.9	8.0	8.1	8.1
Craigavon Built-Up Area						0.0	0.0	0.0	0.0
Lurgan Built-Up Area						7.8	7.9	8.0	8.0
Portadown Built-Up Area						0.0	0.0	0.0	0.0
Other Areas in ABC BC						0.0	0.0	0.0	0.0
				2319	N/A	18.6	37.8	37.9	37.9

Notes:
a. The list of commitments and the associated net sales areas have been provided by the Council.
b. Sales density is assumed to be £8,000 based on Nexus Planning judgement.
c. The turnover for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 19.

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Table 6a: ABC BC - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£598.7	£607.4	£622.5	£639.9
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£634.0	£645.4	£647.3	£647.3
STEP 3:	Available Expenditure before commitments (£m)		-£38.0	-£24.8	-£7.4
STEP 4:	Turnover of all committed floorspace (£m)		£37.8	£37.9	£37.9
STEP 5:	Surplus Expenditure (£m)		-£75.7	-£62.7	-£45.3
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-7,533	-6,214	-4,490
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-10,761	-8,878	-6,414
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-5,539	-4,569	-3,301
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-7,912	-6,528	-4,716

Notes

STEP 1: Survey Derived (with Inflow) turnover is derived from Table 5b.

STEP 2: Benchmark Turnover is derived from Table 5c

STEP 3: Available Expenditure before commitments is derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 5d. It is assumed that all commitments would be operational and with mature trading conditions by 2025.

STEP 5: Surplus Expenditure incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of deep discounter operators (Aldi and Lidl) as sourced from GlobalData 2021. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 19.

STEP 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement utilising the average sales density of Top 4 operators (Asda, Tesco, Sainsbury's and Morrisons) as sourced from GlobalData 2021. The sales density for respective years is "grown" using Figure 4a (density growth rate) of Experian Retail Planner Briefing Note 19.

Table 6b: Armagh Built-Up Area - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£79.5	£80.6	£82.6	£84.9
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£74.2	£75.6	£75.8	£75.8
STEP 3:	Available Expenditure before commitments (£m)		£5.1	£6.8	£9.1
STEP 4:	Turnover of all committed floorspace (£m)		£2.9	£2.9	£2.9
STEP 5:	Surplus Expenditure (£m)		£2.1	£3.9	£6.2
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		213	388	616
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		304	554	881
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		156	285	453
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		223	407	648

Table 6c: Banbridge Built-Up Area - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£130.9	£132.8	£136.1	£139.9
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£162.5	£165.4	£165.9	£165.9
STEP 3:	Available Expenditure before commitments (£m)		-£32.6	-£29.8	-£26.0
STEP 4:	Turnover of all committed floorspace (£m)		£8.0	£8.1	£8.1
STEP 5:	Surplus Expenditure (£m)		-£40.6	-£37.9	-£34.1
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-4,041	-3,753	-3,376
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-5,774	-5,362	-4,823
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-2,972	-2,760	-2,483
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-4,245	-3,942	-3,547

Table 6d: Craigavon Built-Up Area - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£62.2	£63.1	£64.7	£66.5
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£83.7	£85.2	£85.4	£85.4
STEP 3:	Available Expenditure before commitments (£m)		-£22.1	-£20.7	-£18.9
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		-£22.1	-£20.7	-£18.9
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-2,194	-2,057	-1,878
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-3,134	-2,939	-2,682
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-1,613	-1,512	-1,381
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-2,305	-2,161	-1,972

Table 6e: Lurgan Built-Up Area - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£126.5	£128.4	£131.6	£135.2
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£84.4	£86.0	£86.2	£86.2
STEP 3:	Available Expenditure before commitments (£m)		£42.4	£45.3	£49.0
STEP 4:	Turnover of all committed floorspace (£m)		£7.9	£8.0	£8.0
STEP 5:	Surplus Expenditure (£m)		£34.4	£37.4	£41.0
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		3,426	3,704	4,069
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		4,894	5,292	5,813
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		2,519	2,724	2,992
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		3,598	3,891	4,274

Table 6f: Portadown Built-Up Area - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£112.5	£114.1	£117.0	£120.2
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£143.7	£146.3	£146.7	£146.7
STEP 3:	Available Expenditure before commitments (£m)		-£32.2	-£29.8	-£26.5
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		-£32.2	-£29.8	-£26.5
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-3,200	-2,952	-2,628
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-4,571	-4,217	-3,754
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-2,353	-2,171	-1,932
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-3,361	-3,101	-2,760

Table 6g: Other Areas in ABC BC - Convenience Goods Capacity Assessment

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£87.2	£88.4	£90.6	£93.2
STEP 2:	Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£85.5	£87.0	£87.3	£87.3
STEP 3:	Available Expenditure before commitments (£m)		£1.4	£3.4	£5.9
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		£1.4	£3.4	£5.9
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£9,877.8	£10,055.9	£10,086.1	£10,086.1
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		142	334	585
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		203	477	836
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW Convenience FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£13,434.2	£13,676.5	£13,717.6	£13,717.6
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		105	246	430
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		149	351	615

2020 Prices

Table 7a: Population and comparison goods expenditure per capita (excluding SFT)

	Population				Population Growth	Comparison expenditure per capita (excluding SFT)			
Zone	2022	2025	2030	2035	2021-2032	2022	2025	2030	2035
Zone 1	52,006	53,162	54,820	56,306	8.3%	£3,239	£3,420	£3,821	£4,344
Zone 2	50,008	51,120	52,714	54,143	8.3%	£3,446	£3,639	£4,065	£4,621
Zone 3	125,905	128,705	132,717	136,316	8.3%	£3,291	£3,475	£3,882	£4,414
Zone 4	35,557	36,236	37,172	37,973	6.8%	£2,927	£3,091	£3,453	£3,926
Zone 5	109,230	110,799	112,859	114,468	4.8%	£3,418	£3,609	£4,032	£4,584
Total Study Area	372,706	380,023	390,281	399,206	7.1%				

Notes

- a. Zones are based on Postcode geography as shown on the plan at Appendix A
- b. Population data is sourced from Experian MMG3 data (2021 report) for 2022, and is projected forward using NISRA population forecasting (2018-based Population Projections for areas within Northern Ireland), whereby Zone 1, 2 and 3 have been projected using forecasts for Armagh City, Banbridge And Craigavon BC; Zone 4 has been projected using forecasts for Mid Ulster DC; and Zone 5 has been projected using combined forecasts for Newry, Mourne And Down DC and Lisburn And Castlereagh CC.
- c. Per capita expenditure figures are derived from Experian MMG3 data (2021 report) at 2020 - the 2020 figures are then projected to the assessment years using "Ex. SFT adjusted for sales via stores" forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 19.

Table 7b: Total comparison goods expenditure available (excluding SFT)

	Comparison expenditure (£m)				Growth (£m)
Zones	2022	2025	2030	2035	2021-2032
Zone 1	£168.4	£181.8	£209.5	£244.6	45.2%
Zone 2	£172.3	£186.0	£214.3	£250.2	45.2%
Zone 3	£414.3	£447.2	£515.2	£601.6	45.2%
Zone 4	£104.1	£112.0	£128.4	£149.1	43.2%
Zone 5	£373.3	£399.9	£455.0	£524.7	40.6%
Total Study Area	£1,232.4	£1,327.0	£1,522.3	£1,770.2	43.6%

Notes:

- a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 7a

2020 Prices

Table 7c: Comparison goods expenditure per capita (excluding SFT) - For Each Zone, split between comparison goods categories

Year	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Books/ CDs/ DVDs	Chemist	Recreational	Total
2022	£379.7	£105.7	£89.1	£133.3	£237.6	£66.6	£73.0	£147.5	£1,232.4
2025	£408.9	£113.8	£95.9	£143.5	£255.8	£71.8	£78.6	£158.8	£1,327.0
2030	£469.1	£130.5	£110.0	£164.6	£293.4	£82.3	£90.2	£182.1	£1,522.3
2035	£545.6	£151.8	£127.8	£191.4	£341.3	£95.7	£104.8	£211.8	£1,770.2

Table 7d: Total comparison goods expenditure available (excluding SFT)(£m)

2022	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Books/ CDs/ DVDs	Chemist	Recreational	Total
Zone 1	£50.7	£13.3	£13.1	£17.8	£32.1	£9.0	£10.5	£21.8	£168.4
Zone 2	£52.5	£14.7	£12.6	£18.4	£33.0	£9.3	£10.8	£20.9	£172.3
Zone 3	£132.3	£37.3	£27.3	£45.8	£81.1	£22.6	£22.4	£45.5	£414.3
Zone 4	£31.0	£8.4	£7.8	£11.2	£19.9	£5.5	£6.6	£13.7	£104.1
Zone 5	£113.2	£31.9	£28.3	£39.9	£71.5	£20.2	£22.8	£45.5	£373.3
Total Study Area	£379.7	£105.7	£89.1	£133.3	£237.6	£66.6	£73.0	£147.5	£1,232.4
2025	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Books/ CDs/ DVDs	Chemist	Recreational	Total
Zone 1	£54.7	£14.4	£14.2	£19.2	£34.7	£9.7	£11.3	£23.6	£181.8
Zone 2	£56.7	£15.9	£13.6	£19.9	£35.6	£10.1	£11.6	£22.6	£186.0
Zone 3	£142.8	£40.3	£29.5	£49.5	£87.6	£24.4	£24.1	£49.1	£447.2
Zone 4	£33.4	£9.0	£8.3	£12.1	£21.4	£5.9	£7.1	£14.8	£112.0
Zone 5	£121.3	£34.2	£30.3	£42.8	£76.6	£21.7	£24.4	£48.7	£399.9
Total Study Area	£408.9	£113.8	£95.9	£143.5	£255.8	£71.8	£78.6	£158.8	£1,327.0
2030	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Books/ CDs/ DVDs	Chemist	Recreational	Total
Zone 1	£63.1	£16.6	£16.3	£22.2	£39.9	£11.2	£13.0	£27.1	£209.5
Zone 2	£65.3	£18.3	£15.7	£22.9	£41.0	£11.6	£13.4	£26.0	£214.3
Zone 3	£164.5	£46.4	£34.0	£57.0	£100.9	£28.1	£27.8	£56.6	£515.2
Zone 4	£38.2	£10.3	£9.6	£13.9	£24.5	£6.7	£8.2	£16.9	£128.4
Zone 5	£138.0	£38.9	£34.4	£48.7	£87.1	£24.6	£27.8	£55.4	£455.0
Total Study Area	£469.1	£130.5	£110.0	£164.6	£293.4	£82.3	£90.2	£182.1	£1,522.3
2035	Clothing & Footwear	Furniture	DIY	Electrical	Small Household	Books/ CDs/ DVDs	Chemist	Recreational	Total
Zone 1	£73.6	£19.4	£19.0	£25.9	£46.6	£13.1	£15.2	£31.7	£244.6
Zone 2	£76.3	£21.4	£18.3	£26.8	£47.9	£13.6	£15.7	£30.4	£250.2
Zone 3	£192.0	£54.2	£39.7	£66.6	£117.8	£32.8	£32.5	£66.1	£601.6
Zone 4	£44.4	£12.0	£11.1	£16.1	£28.5	£7.8	£9.5	£19.7	£149.1
Zone 5	£159.2	£44.9	£39.7	£56.1	£100.5	£28.4	£32.0	£63.9	£524.7
Total Study Area	£545.6	£151.8	£127.8	£191.4	£341.3	£95.7	£104.8	£211.8	£1,770.2

Notes:

- a. Zones are based on Postcode geography as shown on the plan at Appendix A
- b. Expenditure figures for each category are derived from Experian MMG3 data (2021 report) at 2020 - the 2020 figures are then projected to the assessment years using "Ex. SFT adjusted for sales via stores' forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 19.

Table 8a: Clothing & footwear goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	57.3%	80.1%	66.4%	83.2%	33.1%	19.4%	78.8%
In-Centre	50.6%	78.6%	44.3%	79.8%	33.1%	11.8%	71.6%
Armagh CC	7.1%	45.3%	0.0%	1.2%	5.3%	0.8%	10.4%
Banbridge TC	8.2%	0.8%	32.8%	5.1%	0.0%	6.2%	10.3%
Craigavon TC	21.4%	19.9%	8.8%	43.6%	25.6%	0.8%	30.7%
Dromore LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.1%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	4.4%	0.0%	0.4%	12.0%	0.0%	0.8%	6.8%
Markethill LTC	0.2%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%
Portadown TC	7.4%	10.0%	2.0%	16.1%	2.2%	0.0%	11.7%
Rathfriland LTC	1.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
Tandragee LTC	0.8%	0.7%	0.4%	1.8%	0.0%	0.0%	1.3%
Out of Centre	6.7%	1.5%	22.1%	3.4%	0.0%	7.7%	7.2%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	6.0%	0.8%	22.1%	1.6%	0.0%	7.7%	6.0%
Bridgewater Retail Park	0.7%	0.3%	2.1%	0.4%	0.0%	0.8%	0.8%
The Boulevard Outlet Shopping Park	5.2%	0.5%	18.7%	1.3%	0.0%	6.9%	5.0%
OoC - Banbridge - Other Stores	0.2%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	0.7%	0.7%	0.0%	1.7%	0.0%	0.0%	1.1%
OoC - Portadown - Other Stores	0.7%	0.7%	0.0%	1.7%	0.0%	0.0%	1.1%
OoC - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - All Other Locations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside of ABC BC	42.7%	19.9%	33.6%	16.8%	66.9%	80.6%	21.2%
Belfast	6.8%	5.8%	6.7%	4.4%	11.9%	8.7%	5.2%
Dungannon	3.6%	2.2%	0.0%	0.0%	40.4%	0.0%	0.5%
Lisburn	13.0%	1.5%	14.1%	9.2%	6.4%	23.8%	8.7%
London	0.2%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%
Newcastle	0.5%	0.0%	1.8%	0.0%	0.0%	0.8%	0.4%
Newry	15.4%	7.4%	8.6%	1.3%	1.3%	42.3%	4.3%
Other Locations in Northern Ireland	2.1%	1.2%	1.2%	1.6%	7.0%	2.3%	1.4%
Republic of Ireland	1.2%	1.7%	0.0%	0.4%	0.0%	2.7%	0.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Table 8b: Clothing & footwear goods shopping expenditure (£m at 2022)
 2020 Prices

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	217.8	40.6	34.9	110.0	10.3	22.0	185.5
In-Centre	192.2	39.8	23.3	105.5	10.3	13.3	168.6
Armagh CC	27.1	23.0	0.0	1.6	1.6	0.9	24.6
Banbridge TC	31.3	0.4	17.2	6.7	0.0	7.0	24.3
Craigavon TC	81.2	10.1	4.6	57.7	7.9	0.9	72.4
Dromore LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	0.4	0.4	0.0	0.0	0.0	0.0	0.4
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	16.9	0.0	0.2	15.8	0.0	0.9	16.0
Markethill LTC	0.6	0.6	0.0	0.0	0.0	0.0	0.6
Portadown TC	28.2	5.1	1.1	21.3	0.7	0.0	27.5
Rathfriland LTC	3.7	0.0	0.0	0.0	0.0	3.7	0.0
Tandragee LTC	3.0	0.4	0.2	2.4	0.0	0.0	3.0
Out of Centre	25.5	0.8	11.6	4.5	0.0	8.7	16.8
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	22.9	0.4	11.6	2.2	0.0	8.7	14.2
Bridgewater Retail Park	2.7	0.2	1.1	0.5	0.0	0.9	1.8
The Boulevard Outlet Shopping Park	19.6	0.3	9.8	1.7	0.0	7.8	11.8
OoC - Banbridge - Other Stores	0.6	0.0	0.6	0.0	0.0	0.0	0.6
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown	2.7	0.4	0.0	2.3	0.0	0.0	2.7
OoC - Portadown - Other Stores	2.7	0.4	0.0	2.3	0.0	0.0	2.7
OoC - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - All Other Locations	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outside of ABC BC	162.0	10.1	17.7	22.3	20.7	91.2	50.0
Belfast	25.7	2.9	3.5	5.8	3.7	9.8	12.3
Dungannon	13.7	1.1	0.0	0.0	12.5	0.0	1.1
Lisburn	49.3	0.8	7.4	12.2	2.0	26.9	20.4
London	0.6	0.0	0.6	0.0	0.0	0.0	0.6
Newcastle	1.8	0.0	0.9	0.0	0.0	0.9	0.9
Newry	58.4	3.8	4.5	1.7	0.4	48.0	10.0
Other Locations in Northern Ireland	8.1	0.6	0.6	2.1	2.2	2.6	3.3
Republic of Ireland	4.4	0.9	0.0	0.5	0.0	3.1	1.3
Total	379.8	50.7	52.5	132.3	31.0	113.2	235.5

Note: Figures may not add up due to rounding

Table 9a: Furniture goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	48.8%	66.9%	70.6%	73.2%	17.3%	10.8%	71.3%
In-Centre	48.2%	66.9%	69.9%	72.7%	13.9%	10.8%	70.9%
Armagh CC	5.8%	43.1%	0.0%	0.0%	4.1%	0.0%	8.8%
Banbridge TC	11.1%	0.0%	59.6%	5.2%	0.0%	3.3%	16.4%
Craigavon TC	4.3%	5.4%	0.5%	9.1%	3.7%	0.0%	6.4%
Dromore LTC	0.6%	0.0%	1.6%	0.9%	0.0%	0.0%	0.9%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.2%	1.6%	0.0%	0.0%	0.0%	0.0%	0.3%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	10.5%	0.0%	2.9%	27.8%	0.0%	0.8%	16.5%
Markethill LTC	2.0%	8.3%	0.5%	0.9%	3.5%	0.8%	2.3%
Portadown TC	11.7%	8.6%	1.9%	28.8%	2.6%	0.0%	18.6%
Rathfriland LTC	2.2%	0.0%	3.0%	0.0%	0.0%	5.8%	0.7%
Tandragee LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre	0.5%	0.0%	0.7%	0.5%	3.5%	0.0%	0.4%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.3%
Bridgewater Retail Park	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.3%
The Boulevard Outlet Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Other	0.4%	0.0%	0.7%	0.0%	3.5%	0.0%	0.2%
OoC - All Other Locations	0.4%	0.0%	0.7%	0.0%	3.5%	0.0%	0.2%
Outside of ABC BC	51.2%	33.1%	29.4%	26.8%	82.7%	89.2%	28.7%
Belfast	9.9%	9.1%	11.0%	10.9%	1.5%	10.7%	10.5%
Dungannon	5.6%	3.7%	0.0%	3.2%	50.4%	0.0%	2.6%
Lisburn	11.9%	1.1%	8.3%	10.3%	0.0%	22.9%	8.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.2%
Newry	16.3%	9.1%	6.1%	1.7%	1.5%	45.2%	4.2%
Other Locations in Northern Ireland	5.4%	6.8%	3.3%	0.7%	29.3%	5.0%	2.5%
Republic of Ireland	2.1%	3.3%	0.0%	0.0%	0.0%	5.5%	0.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Table 9b: Furniture goods shopping expenditure (£m at 2022)
 2020 Prices

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	51.5	8.9	10.4	27.3	1.5	3.4	46.6
In-Centre	51.0	8.9	10.3	27.1	1.2	3.4	46.4
Armagh CC	6.1	5.7	0.0	0.0	0.3	0.0	5.7
Banbridge TC	11.8	0.0	8.8	1.9	0.0	1.0	10.7
Craigavon TC	4.5	0.7	0.1	3.4	0.3	0.0	4.2
Dromore LTC	0.6	0.0	0.2	0.3	0.0	0.0	0.6
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	0.2	0.2	0.0	0.0	0.0	0.0	0.2
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	11.1	0.0	0.4	10.4	0.0	0.3	10.8
Markethill LTC	2.1	1.1	0.1	0.3	0.3	0.3	1.5
Portadown TC	12.4	1.1	0.3	10.7	0.2	0.0	12.2
Rathfriland LTC	2.3	0.0	0.4	0.0	0.0	1.9	0.4
Tandragee LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Out of Centre	0.6	0.0	0.1	0.2	0.3	0.0	0.3
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	0.2	0.0	0.0	0.2	0.0	0.0	0.2
Bridgewater Retail Park	0.2	0.0	0.0	0.2	0.0	0.0	0.2
The Boulevard Outlet Shopping Park	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Other	0.4	0.0	0.1	0.0	0.3	0.0	0.1
OoC - All Other Locations	0.4	0.0	0.1	0.0	0.3	0.0	0.1
Outside of ABC BC	54.1	4.4	4.3	10.0	6.9	28.5	18.7
Belfast	10.4	1.2	1.6	4.1	0.1	3.4	6.9
Dungannon	5.9	0.5	0.0	1.2	4.2	0.0	1.7
Lisburn	12.5	0.1	1.2	3.9	0.0	7.3	5.2
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.1	0.0	0.1	0.0	0.0	0.0	0.1
Newry	17.3	1.2	0.9	0.6	0.1	14.4	2.7
Other Locations in Northern Ireland	5.7	0.9	0.5	0.3	2.5	1.6	1.7
Republic of Ireland	2.2	0.4	0.0	0.0	0.0	1.7	0.4
Total	105.7	13.3	14.7	37.3	8.4	31.9	65.4

Note: Figures may not add up due to rounding

Table 10a: DIY goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	46.6%	75.4%	52.6%	78.9%	22.2%	6.0%	71.8%
In-Centre	42.1%	64.5%	45.1%	74.0%	18.9%	6.0%	64.8%
Armagh CC	5.8%	32.1%	0.0%	0.0%	2.4%	2.7%	7.9%
Banbridge TC	4.7%	0.0%	32.6%	0.4%	0.0%	0.0%	7.9%
Craigavon TC	16.0%	12.3%	7.2%	39.3%	12.5%	0.0%	25.0%
Dromore LTC	0.6%	0.0%	3.6%	0.0%	1.0%	0.0%	0.9%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	1.6%	10.8%	0.0%	0.0%	0.0%	0.0%	2.7%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	5.1%	0.0%	0.0%	16.8%	0.0%	0.0%	8.6%
Markethill LTC	0.3%	1.8%	0.0%	0.0%	0.0%	0.0%	0.4%
Portadown TC	6.8%	7.6%	1.1%	17.2%	3.0%	0.0%	11.0%
Rathfriland LTC	1.1%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
Tandragee LTC	0.2%	0.0%	0.6%	0.4%	0.0%	0.0%	0.3%
Out of Centre	4.5%	10.9%	7.6%	4.9%	3.3%	0.0%	7.0%
OoC - Armagh	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.4%
OoC - Armagh - Other Stores	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.4%
OoC - Banbridge	0.9%	0.0%	6.0%	0.0%	0.0%	0.0%	1.4%
Bridgewater Retail Park	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.3%
The Boulevard Outlet Shopping Park	0.7%	0.0%	4.7%	0.0%	0.0%	0.0%	1.1%
OoC - Banbridge - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.2%
OoC - Dromore - Other Stores	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.2%
OoC - Lurgan	0.5%	0.0%	0.0%	1.6%	0.0%	0.0%	0.8%
OoC - Lurgan - Other Stores	0.5%	0.0%	0.0%	1.6%	0.0%	0.0%	0.8%
OoC - Portadown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Other	2.8%	9.4%	0.8%	3.3%	3.3%	0.0%	4.2%
OoC - All Other Locations	2.8%	9.4%	0.8%	3.3%	3.3%	0.0%	4.2%
Outside of ABC BC	53.4%	24.6%	47.4%	21.1%	77.8%	94.0%	28.2%
Belfast	2.0%	0.0%	2.3%	0.4%	2.4%	4.3%	0.7%
Dungannon	3.8%	0.0%	0.0%	0.0%	43.9%	0.0%	0.0%
Lisburn	21.3%	1.5%	29.9%	13.3%	6.8%	38.3%	14.3%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry	20.1%	19.1%	12.1%	6.6%	1.4%	42.4%	11.0%
Other Locations in Northern Ireland	5.9%	4.1%	3.0%	0.9%	23.2%	8.2%	2.2%
Republic of Ireland	0.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Table 10b: DIY goods shopping expenditure (£m at 2022)
 2020 Prices

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	41.5	9.9	6.6	21.6	1.7	1.7	38.1
In-Centre	37.5	8.5	5.7	20.2	1.5	1.7	34.3
Armagh CC	5.2	4.2	0.0	0.0	0.2	0.8	4.2
Banbridge TC	4.2	0.0	4.1	0.1	0.0	0.0	4.2
Craigavon TC	14.2	1.6	0.9	10.7	1.0	0.0	13.2
Dromore LTC	0.5	0.0	0.5	0.0	0.1	0.0	0.5
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	1.4	1.4	0.0	0.0	0.0	0.0	1.4
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	4.6	0.0	0.0	4.6	0.0	0.0	4.6
Markethill LTC	0.2	0.2	0.0	0.0	0.0	0.0	0.2
Portadown TC	6.1	1.0	0.1	4.7	0.2	0.0	5.8
Rathfriland LTC	0.9	0.0	0.0	0.0	0.0	0.9	0.0
Tandragee LTC	0.2	0.0	0.1	0.1	0.0	0.0	0.2
Out of Centre	4.0	1.4	1.0	1.3	0.3	0.0	3.7
OoC - Armagh	0.2	0.2	0.0	0.0	0.0	0.0	0.2
OoC - Armagh - Other Stores	0.2	0.2	0.0	0.0	0.0	0.0	0.2
OoC - Banbridge	0.8	0.0	0.8	0.0	0.0	0.0	0.8
Bridgewater Retail Park	0.2	0.0	0.2	0.0	0.0	0.0	0.2
The Boulevard Outlet Shopping Park	0.6	0.0	0.6	0.0	0.0	0.0	0.6
OoC - Banbridge - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.1	0.0	0.1	0.0	0.0	0.0	0.1
OoC - Dromore - Other Stores	0.1	0.0	0.1	0.0	0.0	0.0	0.1
OoC - Lurgan	0.4	0.0	0.0	0.4	0.0	0.0	0.4
OoC - Lurgan - Other Stores	0.4	0.0	0.0	0.4	0.0	0.0	0.4
OoC - Portadown	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Other	2.5	1.2	0.1	0.9	0.3	0.0	2.2
OoC - All Other Locations	2.5	1.2	0.1	0.9	0.3	0.0	2.2
Outside of ABC BC	47.6	3.2	6.0	5.8	6.0	26.6	15.0
Belfast	1.8	0.0	0.3	0.1	0.2	1.2	0.4
Dungannon	3.4	0.0	0.0	0.0	3.4	0.0	0.0
Lisburn	19.0	0.2	3.8	3.6	0.5	10.8	7.6
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newry	17.9	2.5	1.5	1.8	0.1	12.0	5.8
Other Locations in Northern Ireland	5.3	0.5	0.4	0.2	1.8	2.3	1.2
Republic of Ireland	0.3	0.0	0.0	0.0	0.0	0.3	0.0
Total	89.1	13.1	12.6	27.3	7.8	28.3	53.0

Note: Figures may not add up due to rounding

Table 11a: Electrical goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	54.1%	90.3%	57.7%	83.7%	37.1%	6.9%	79.3%
In-Centre	50.6%	83.4%	47.8%	80.4%	37.1%	6.9%	73.7%
Armagh CC	5.7%	31.0%	0.0%	1.3%	13.1%	0.0%	7.5%
Banbridge TC	4.4%	0.0%	31.1%	0.4%	0.0%	0.0%	7.2%
Craigavon TC	23.4%	8.4%	9.9%	56.5%	17.4%	0.0%	35.6%
Dromore LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	2.6%	18.3%	0.0%	0.0%	0.0%	0.6%	4.0%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	1.7%	0.0%	0.0%	5.1%	0.0%	0.0%	2.8%
Markethill LTC	6.9%	23.7%	6.0%	4.1%	6.6%	3.1%	8.8%
Portadown TC	4.8%	2.0%	0.4%	13.0%	0.0%	0.0%	7.8%
Rathfriland LTC	1.0%	0.0%	0.4%	0.0%	0.0%	3.2%	0.1%
Tandragee LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre	3.4%	6.8%	9.9%	3.3%	0.0%	0.0%	5.6%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	2.0%	0.0%	8.9%	2.4%	0.0%	0.0%	3.3%
Bridgewater Retail Park	0.2%	0.0%	1.7%	0.0%	0.0%	0.0%	0.4%
The Boulevard Outlet Shopping Park	1.4%	0.0%	4.5%	2.4%	0.0%	0.0%	2.3%
OoC - Banbridge - Other Stores	0.4%	0.0%	2.7%	0.0%	0.0%	0.0%	0.6%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	0.4%	0.4%	0.0%	1.0%	0.0%	0.0%	0.6%
OoC - Portadown - Other Stores	0.4%	0.4%	0.0%	1.0%	0.0%	0.0%	0.6%
OoC - Other	1.0%	6.4%	1.0%	0.0%	0.0%	0.0%	1.6%
OoC - All Other Locations	1.0%	6.4%	1.0%	0.0%	0.0%	0.0%	1.6%
Outside of ABC BC	45.9%	9.7%	42.3%	16.3%	62.9%	93.1%	20.7%
Belfast	2.9%	2.1%	0.0%	2.2%	4.5%	5.1%	1.7%
Dungannon	3.6%	0.6%	0.0%	0.0%	41.9%	0.0%	0.1%
Lisburn	18.3%	0.0%	28.6%	14.1%	1.3%	31.4%	14.3%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.8%	0.0%	1.3%	0.0%	0.0%	2.1%	0.3%
Newry	16.3%	5.8%	8.9%	0.0%	0.0%	47.7%	3.3%
Other Locations in Northern Ireland	4.0%	1.2%	3.5%	0.0%	15.3%	6.8%	1.1%
Republic of Ireland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study

Nexus Planning

**Table 11b: Electrical goods shopping expenditure (£m at 2022)
2020 Prices**

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	72.0	16.1	10.6	38.4	4.2	2.8	65.1
In-Centre	67.5	14.9	8.8	36.8	4.2	2.8	60.5
Armagh CC	7.6	5.5	0.0	0.6	1.5	0.0	6.1
Banbridge TC	5.9	0.0	5.7	0.2	0.0	0.0	5.9
Craigavon TC	31.2	1.5	1.8	25.9	2.0	0.0	29.2
Dromore LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	3.5	3.3	0.0	0.0	0.0	0.2	3.3
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	2.3	0.0	0.0	2.3	0.0	0.0	2.3
Markethill LTC	9.2	4.2	1.1	1.9	0.7	1.2	7.2
Portadown TC	6.4	0.3	0.1	6.0	0.0	0.0	6.4
Rathfriland LTC	1.4	0.0	0.1	0.0	0.0	1.3	0.1
Tandragee LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Out of Centre	4.6	1.2	1.8	1.5	0.0	0.0	4.6
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	2.7	0.0	1.6	1.1	0.0	0.0	2.7
Bridgewater Retail Park	0.3	0.0	0.3	0.0	0.0	0.0	0.3
The Boulevard Outlet Shopping Park	1.9	0.0	0.8	1.1	0.0	0.0	1.9
OoC - Banbridge - Other Stores	0.5	0.0	0.5	0.0	0.0	0.0	0.5
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown	0.5	0.1	0.0	0.4	0.0	0.0	0.5
OoC - Portadown - Other Stores	0.5	0.1	0.0	0.4	0.0	0.0	0.5
OoC - Other	1.3	1.1	0.2	0.0	0.0	0.0	1.3
OoC - All Other Locations	1.3	1.1	0.2	0.0	0.0	0.0	1.3
Outside of ABC BC	61.2	1.7	7.8	7.5	7.1	37.1	17.0
Belfast	3.9	0.4	0.0	1.0	0.5	2.0	1.4
Dungannon	4.8	0.1	0.0	0.0	4.7	0.0	0.1
Lisburn	24.4	0.0	5.3	6.5	0.1	12.5	11.7
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	1.1	0.0	0.2	0.0	0.0	0.8	0.2
Newry	21.7	1.0	1.6	0.0	0.0	19.0	2.7
Other Locations in Northern Ireland	5.3	0.2	0.6	0.0	1.7	2.7	0.9
Republic of Ireland	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	133.3	17.8	18.4	45.8	11.2	39.9	82.1

Note: Figures may not add up due to rounding

Table 12a: Small household goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	55.9%	86.6%	72.6%	76.7%	35.7%	16.4%	77.9%
In-Centre	48.9%	86.2%	52.8%	69.5%	35.7%	10.6%	69.4%
Armagh CC	9.2%	53.3%	0.0%	1.6%	17.7%	0.0%	12.6%
Banbridge TC	7.2%	0.0%	40.5%	0.5%	0.0%	4.8%	9.4%
Craigavon TC	13.5%	6.8%	9.1%	31.2%	8.2%	0.0%	20.8%
Dromore LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.7%	5.1%	0.0%	0.0%	0.0%	0.0%	1.1%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	6.8%	0.0%	0.9%	18.7%	3.7%	0.0%	10.6%
Markethill LTC	1.3%	6.0%	0.9%	0.5%	0.0%	0.7%	1.8%
Portadown TC	8.5%	14.5%	1.4%	17.0%	6.2%	0.0%	12.9%
Rathfriland LTC	1.5%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%
Tandragee LTC	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%
Out of Centre	7.0%	0.4%	19.8%	7.2%	0.0%	5.9%	8.5%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	4.9%	0.4%	19.8%	1.0%	0.0%	5.9%	5.1%
Bridgewater Retail Park	2.4%	0.4%	6.1%	0.5%	0.0%	4.4%	1.8%
The Boulevard Outlet Shopping Park	1.5%	0.0%	8.0%	0.5%	0.0%	0.7%	2.1%
OoC - Banbridge - Other Stores	1.0%	0.0%	5.7%	0.0%	0.0%	0.7%	1.3%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	1.9%	0.0%	0.0%	5.7%	0.0%	0.0%	3.2%
OoC - Portadown - Other Stores	1.9%	0.0%	0.0%	5.7%	0.0%	0.0%	3.2%
OoC - Other	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.3%
OoC - All Other Locations	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.3%
Outside of ABC BC	44.1%	13.4%	27.4%	23.3%	64.3%	83.6%	22.1%
Belfast	11.3%	3.9%	13.3%	11.9%	7.0%	14.3%	10.4%
Dungannon	3.4%	1.1%	0.5%	0.0%	37.9%	0.0%	0.3%
Lisburn	12.2%	0.0%	8.4%	9.2%	4.8%	24.9%	7.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.2%
Newry	14.4%	6.2%	4.1%	1.7%	0.0%	41.1%	3.3%
Other Locations in Northern Ireland	2.6%	1.6%	0.5%	0.5%	14.5%	3.2%	0.7%
Republic of Ireland	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study

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**Table 12b: Small household goods shopping expenditure (£m at 2022)
2020 Prices**

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	132.8	27.8	23.9	62.2	7.1	11.7	113.9
In-Centre	116.1	27.7	17.4	56.3	7.1	7.5	101.4
Armagh CC	21.9	17.1	0.0	1.3	3.5	0.0	18.4
Banbridge TC	17.2	0.0	13.3	0.4	0.0	3.4	13.7
Craigavon TC	32.1	2.2	3.0	25.3	1.6	0.0	30.5
Dromore LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	1.6	1.6	0.0	0.0	0.0	0.0	1.6
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	16.2	0.0	0.3	15.2	0.7	0.0	15.5
Markethill LTC	3.2	1.9	0.3	0.4	0.0	0.5	2.6
Portadown TC	20.1	4.7	0.4	13.8	1.2	0.0	18.9
Rathfriland LTC	3.6	0.0	0.0	0.0	0.0	3.6	0.0
Tandragee LTC	0.1	0.1	0.0	0.0	0.0	0.0	0.1
Out of Centre	16.7	0.1	6.5	5.8	0.0	4.2	12.5
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	11.7	0.1	6.5	0.8	0.0	4.2	7.5
Bridgewater Retail Park	5.7	0.1	2.0	0.4	0.0	3.2	2.6
The Boulevard Outlet Shopping Park	3.5	0.0	2.6	0.4	0.0	0.5	3.0
OoC - Banbridge - Other Stores	2.4	0.0	1.9	0.0	0.0	0.5	1.9
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown	4.6	0.0	0.0	4.6	0.0	0.0	4.6
OoC - Portadown - Other Stores	4.6	0.0	0.0	4.6	0.0	0.0	4.6
OoC - Other	0.4	0.0	0.0	0.4	0.0	0.0	0.4
OoC - All Other Locations	0.4	0.0	0.0	0.4	0.0	0.0	0.4
Outside of ABC BC	104.8	4.3	9.0	18.9	12.8	59.8	32.3
Belfast	26.8	1.2	4.4	9.6	1.4	10.2	15.3
Dungannon	8.0	0.4	0.2	0.0	7.5	0.0	0.5
Lisburn	29.0	0.0	2.8	7.5	1.0	17.8	10.3
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.2	0.0	0.2	0.0	0.0	0.0	0.2
Newry	34.2	2.0	1.4	1.4	0.0	29.4	4.8
Other Locations in Northern Ireland	6.3	0.5	0.2	0.4	2.9	2.3	1.1
Republic of Ireland	0.2	0.2	0.0	0.0	0.0	0.0	0.2
Total	237.6	32.1	33.0	81.1	19.9	71.5	146.2

Note: Figures may not add up due to rounding

Table 13a: Small Media (Books, CDs, DVDs) shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	55.4%	84.7%	79.6%	80.9%	13.4%	14.0%	81.4%
In-Centre	46.2%	79.7%	31.8%	78.8%	13.4%	10.2%	68.3%
Armagh CC	7.6%	50.3%	0.0%	0.0%	9.4%	0.0%	11.1%
Banbridge TC	3.6%	0.0%	14.8%	0.0%	0.0%	5.1%	3.4%
Craigavon TC	11.3%	14.1%	4.8%	25.7%	0.0%	0.0%	18.4%
Dromore LTC	0.8%	0.0%	5.4%	0.0%	0.0%	0.0%	1.2%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	7.2%	0.0%	4.4%	19.5%	0.0%	0.0%	11.8%
Markethill LTC	0.4%	3.2%	0.0%	0.0%	0.0%	0.0%	0.7%
Portadown TC	13.1%	11.1%	1.2%	32.7%	4.0%	0.0%	20.8%
Rathfriland LTC	1.7%	0.0%	1.2%	0.0%	0.0%	5.1%	0.3%
Tandragee LTC	0.3%	0.0%	0.0%	0.9%	0.0%	0.0%	0.5%
Out of Centre	9.2%	5.0%	47.8%	2.1%	0.0%	3.8%	13.2%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	8.1%	0.0%	47.8%	0.9%	0.0%	3.8%	11.4%
Bridgewater Retail Park	1.6%	0.0%	11.2%	0.0%	0.0%	0.0%	2.6%
The Boulevard Outlet Shopping Park	4.1%	0.0%	23.8%	0.9%	0.0%	1.6%	5.9%
OoC - Banbridge - Other Stores	2.5%	0.0%	12.8%	0.0%	0.0%	2.2%	2.9%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Portadown	1.1%	5.0%	0.0%	1.2%	0.0%	0.0%	1.8%
OoC - Portadown - Other Stores	1.1%	5.0%	0.0%	1.2%	0.0%	0.0%	1.8%
OoC - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - All Other Locations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside of ABC BC	44.6%	15.3%	20.4%	19.1%	86.6%	86.0%	18.6%
Belfast	5.3%	3.7%	7.5%	4.1%	0.0%	7.8%	4.8%
Dungannon	6.8%	1.5%	0.0%	0.0%	80.9%	0.0%	0.3%
Lisburn	14.8%	0.0%	6.6%	12.0%	0.0%	32.3%	8.1%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	1.1%	0.0%	4.2%	0.0%	0.0%	1.6%	1.0%
Newry	13.8%	9.0%	2.0%	3.1%	2.9%	36.5%	4.1%
Other Locations in Northern Ireland	2.6%	0.0%	0.0%	0.0%	2.9%	7.8%	0.0%
Republic of Ireland	0.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study

Nexus Planning

**Table 13b: Small Media (Books, CDs, DVDs) shopping expenditure (£m at 2022)
2020 Prices**

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	36.9	7.6	7.4	18.3	0.7	2.8	33.4
In-Centre	30.8	7.2	3.0	17.8	0.7	2.1	28.0
Armagh CC	5.0	4.5	0.0	0.0	0.5	0.0	4.5
Banbridge TC	2.4	0.0	1.4	0.0	0.0	1.0	1.4
Craigavon TC	7.5	1.3	0.4	5.8	0.0	0.0	7.5
Dromore LTC	0.5	0.0	0.5	0.0	0.0	0.0	0.5
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	0.1	0.1	0.0	0.0	0.0	0.0	0.1
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	4.8	0.0	0.4	4.4	0.0	0.0	4.8
Markethill LTC	0.3	0.3	0.0	0.0	0.0	0.0	0.3
Portadown TC	8.7	1.0	0.1	7.4	0.2	0.0	8.5
Rathfriland LTC	1.1	0.0	0.1	0.0	0.0	1.0	0.1
Tandragee LTC	0.2	0.0	0.0	0.2	0.0	0.0	0.2
Out of Centre	6.2	0.4	4.5	0.5	0.0	0.8	5.4
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	5.4	0.0	4.5	0.2	0.0	0.8	4.7
Bridgewater Retail Park	1.0	0.0	1.0	0.0	0.0	0.0	1.0
The Boulevard Outlet Shopping Park	2.7	0.0	2.2	0.2	0.0	0.3	2.4
OoC - Banbridge - Other Stores	1.7	0.0	1.2	0.0	0.0	0.5	1.2
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Portadown	0.7	0.4	0.0	0.3	0.0	0.0	0.7
OoC - Portadown - Other Stores	0.7	0.4	0.0	0.3	0.0	0.0	0.7
OoC - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - All Other Locations	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outside of ABC BC	29.7	1.4	1.9	4.3	4.7	17.4	7.6
Belfast	3.5	0.3	0.7	0.9	0.0	1.6	2.0
Dungannon	4.6	0.1	0.0	0.0	4.4	0.0	0.1
Lisburn	9.9	0.0	0.6	2.7	0.0	6.5	3.3
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.7	0.0	0.4	0.0	0.0	0.3	0.4
Newry	9.2	0.8	0.2	0.7	0.2	7.4	1.7
Other Locations in Northern Ireland	1.7	0.0	0.0	0.0	0.2	1.6	0.0
Republic of Ireland	0.1	0.1	0.0	0.0	0.0	0.0	0.1
Total	66.6	9.0	9.3	22.6	5.5	20.2	41.0

Note: Figures may not add up due to rounding

Table 14a: Chemist goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	58.5%	97.0%	85.1%	87.8%	6.4%	14.6%	89.3%
In-Centre	50.5%	88.7%	74.2%	74.8%	5.7%	10.8%	78.0%
Armagh CC	10.1%	63.3%	0.0%	1.1%	4.3%	0.8%	15.7%
Banbridge TC	8.4%	0.0%	53.1%	1.8%	0.0%	0.0%	14.0%
Craigavon TC	5.4%	3.4%	2.3%	14.9%	0.0%	0.0%	9.0%
Dromore LTC	2.1%	0.0%	14.1%	0.0%	0.0%	0.0%	3.5%
Gilford LTC	0.1%	0.0%	0.5%	0.0%	0.0%	0.0%	0.1%
Keady LTC	1.4%	9.1%	0.3%	0.0%	0.0%	0.0%	2.3%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	9.4%	0.0%	0.3%	30.6%	0.0%	0.0%	15.8%
Markethill LTC	0.7%	5.1%	0.0%	0.0%	0.0%	0.0%	1.2%
Portadown TC	8.2%	7.8%	0.9%	22.3%	1.4%	0.0%	13.5%
Rathfriland LTC	3.5%	0.0%	2.7%	0.0%	0.0%	10.0%	0.7%
Tandragee LTC	1.3%	0.0%	0.0%	4.2%	0.0%	0.0%	2.1%
Out of Centre	8.0%	8.3%	10.9%	13.0%	0.7%	3.8%	11.4%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	3.6%	0.0%	10.3%	3.6%	0.0%	3.0%	4.4%
Bridgewater Retail Park	0.6%	0.0%	1.4%	1.3%	0.0%	0.0%	1.0%
The Boulevard Outlet Shopping Park	1.6%	0.0%	5.0%	2.1%	0.0%	0.8%	2.3%
OoC - Banbridge - Other Stores	1.4%	0.0%	4.0%	0.3%	0.0%	2.2%	1.1%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.1%	0.0%	0.3%	0.3%	0.0%	0.0%	0.2%
OoC - Lurgan - Other Stores	0.1%	0.0%	0.3%	0.3%	0.0%	0.0%	0.2%
OoC - Portadown	1.9%	0.3%	0.0%	5.9%	0.0%	0.0%	3.1%
OoC - Portadown - Other Stores	1.9%	0.3%	0.0%	5.9%	0.0%	0.0%	3.1%
OoC - Other	2.5%	8.0%	0.3%	3.1%	0.7%	0.8%	3.6%
OoC - All Other Locations	2.5%	8.0%	0.3%	3.1%	0.7%	0.8%	3.6%
Outside of ABC BC	41.5%	3.0%	14.9%	12.2%	93.6%	85.4%	10.7%
Belfast	0.6%	0.5%	3.1%	0.3%	0.0%	0.0%	1.0%
Dungannon	6.3%	0.5%	0.0%	0.0%	68.8%	0.0%	0.1%
Lisburn	12.1%	0.0%	6.1%	6.8%	0.7%	29.1%	5.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry	11.9%	0.5%	1.4%	0.0%	0.0%	37.4%	0.5%
Other Locations in Northern Ireland	10.2%	0.6%	3.2%	5.2%	24.1%	19.0%	3.6%
Republic of Ireland	0.3%	1.0%	1.0%	0.0%	0.0%	0.0%	0.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study
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**Table 14b: Chemist goods shopping expenditure (£m at 2022)
2020 Prices**

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	42.7	10.2	9.2	19.6	0.4	3.3	39.0
In-Centre	36.9	9.3	8.0	16.7	0.4	2.5	34.0
Armagh CC	7.3	6.6	0.0	0.2	0.3	0.2	6.9
Banbridge TC	6.1	0.0	5.7	0.4	0.0	0.0	6.1
Craigavon TC	3.9	0.4	0.2	3.3	0.0	0.0	3.9
Dromore LTC	1.5	0.0	1.5	0.0	0.0	0.0	1.5
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	1.0	1.0	0.0	0.0	0.0	0.0	1.0
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	6.9	0.0	0.0	6.8	0.0	0.0	6.9
Markethill LTC	0.5	0.5	0.0	0.0	0.0	0.0	0.5
Portadown TC	6.0	0.8	0.1	5.0	0.1	0.0	5.9
Rathfriland LTC	2.6	0.0	0.3	0.0	0.0	2.3	0.3
Tandragee LTC	0.9	0.0	0.0	0.9	0.0	0.0	0.9
Out of Centre	5.9	0.9	1.2	2.9	0.0	0.9	5.0
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	2.6	0.0	1.1	0.8	0.0	0.7	1.9
Bridgewater Retail Park	0.4	0.0	0.1	0.3	0.0	0.0	0.4
The Boulevard Outlet Shopping Park	1.2	0.0	0.5	0.5	0.0	0.2	1.0
OoC - Banbridge - Other Stores	1.0	0.0	0.4	0.1	0.0	0.5	0.5
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.1	0.0	0.0	0.1	0.0	0.0	0.1
OoC - Lurgan - Other Stores	0.1	0.0	0.0	0.1	0.0	0.0	0.1
OoC - Portadown	1.4	0.0	0.0	1.3	0.0	0.0	1.4
OoC - Portadown - Other Stores	1.4	0.0	0.0	1.3	0.0	0.0	1.4
OoC - Other	1.8	0.8	0.0	0.7	0.0	0.2	1.6
OoC - All Other Locations	1.8	0.8	0.0	0.7	0.0	0.2	1.6
Outside of ABC BC	30.3	0.3	1.6	2.7	6.2	19.5	4.7
Belfast	0.4	0.0	0.3	0.1	0.0	0.0	0.4
Dungannon	4.6	0.0	0.0	0.0	4.5	0.0	0.0
Lisburn	8.8	0.0	0.7	1.5	0.0	6.6	2.2
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newry	8.7	0.0	0.2	0.0	0.0	8.5	0.2
Other Locations in Northern Ireland	7.5	0.1	0.3	1.2	1.6	4.3	1.6
Republic of Ireland	0.2	0.1	0.1	0.0	0.0	0.0	0.2
Total	73.0	10.5	10.8	22.4	6.6	22.8	43.6

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study
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Table 15a: Recreational goods shopping patterns

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (£m)
Within ABC BC	53.6%	78.4%	68.2%	76.9%	38.1%	16.3%	75.2%
In-Centre	47.8%	78.4%	52.8%	72.2%	35.9%	9.9%	69.1%
Armagh CC	9.0%	49.2%	0.0%	1.0%	15.6%	0.0%	12.7%
Banbridge TC	7.6%	0.0%	41.0%	1.0%	0.0%	4.9%	10.2%
Craigavon TC	11.6%	17.3%	7.8%	22.1%	12.5%	0.0%	17.5%
Dromore LTC	0.3%	0.0%	2.5%	0.0%	0.0%	0.0%	0.6%
Gilford LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Keady LTC	0.4%	2.8%	0.0%	0.0%	0.0%	0.0%	0.7%
Legahory DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lurgan TC	6.8%	0.0%	0.8%	21.8%	0.0%	0.0%	11.4%
Markethill LTC	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%
Portadown TC	10.2%	8.4%	0.8%	26.4%	7.8%	0.0%	15.9%
Rathfriland LTC	1.5%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Tandragee LTC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre	5.8%	0.0%	15.4%	4.7%	2.2%	6.4%	6.1%
OoC - Armagh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Armagh - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Banbridge	4.9%	0.0%	15.4%	2.4%	0.0%	6.4%	4.9%
Bridgewater Retail Park	0.8%	0.0%	0.8%	2.4%	0.0%	0.0%	1.4%
The Boulevard Outlet Shopping Park	1.9%	0.0%	10.1%	0.0%	0.0%	1.5%	2.4%
OoC - Banbridge - Other Stores	2.2%	0.0%	4.5%	0.0%	0.0%	4.9%	1.1%
OoC - Craigavon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Craigavon - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Dromore - Other Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OoC - Lurgan	0.5%	0.0%	0.0%	1.6%	0.0%	0.0%	0.8%
OoC - Lurgan - Other Stores	0.5%	0.0%	0.0%	1.6%	0.0%	0.0%	0.8%
OoC - Portadown	0.2%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%
OoC - Portadown - Other Stores	0.2%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%
OoC - Other	0.2%	0.0%	0.0%	0.7%	0.0%	0.0%	0.3%
OoC - All Other Locations	0.2%	0.0%	0.0%	0.7%	0.0%	0.0%	0.3%
Outside of ABC BC	46.4%	21.6%	31.8%	23.1%	61.9%	83.7%	24.8%
Belfast	11.0%	5.4%	12.4%	18.3%	0.0%	9.0%	13.7%
Dungannon	2.2%	0.0%	0.0%	0.0%	23.5%	0.0%	0.0%
Lisburn	8.4%	0.8%	7.8%	3.9%	0.0%	19.5%	4.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newcastle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newry	21.5%	13.1%	10.9%	0.0%	10.3%	55.2%	5.8%
Other Locations in Northern Ireland	3.2%	1.1%	0.8%	1.0%	28.1%	0.0%	1.0%
Republic of Ireland	0.2%	1.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures may not add up due to rounding

Armagh City, Banbridge and Craigavon Borough - Retail and Commercial Leisure Study

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Table 15b: Recreational goods shopping expenditure (£m at 2022)

2020 Prices

Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inner Study Area (%)
Within ABC BC	79.0	17.1	14.3	35.0	5.2	7.4	66.4
In-Centre	70.4	17.1	11.1	32.9	4.9	4.5	61.0
Armagh CC	13.3	10.7	0.0	0.4	2.1	0.0	11.2
Banbridge TC	11.3	0.0	8.6	0.4	0.0	2.2	9.0
Craigavon TC	17.2	3.8	1.6	10.0	1.7	0.0	15.5
Dromore LTC	0.5	0.0	0.5	0.0	0.0	0.0	0.5
Gilford LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Keady LTC	0.6	0.6	0.0	0.0	0.0	0.0	0.6
Legahory DC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lurgan TC	10.1	0.0	0.2	9.9	0.0	0.0	10.1
Markethill LTC	0.2	0.2	0.0	0.0	0.0	0.0	0.2
Portadown TC	15.1	1.8	0.2	12.0	1.1	0.0	14.0
Rathfriland LTC	2.2	0.0	0.0	0.0	0.0	2.2	0.0
Tandragee LTC	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Out of Centre	8.6	0.0	3.2	2.1	0.3	2.9	5.4
OoC - Armagh	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Armagh - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Banbridge	7.2	0.0	3.2	1.1	0.0	2.9	4.3
Bridgewater Retail Park	1.2	0.0	0.2	1.1	0.0	0.0	1.2
The Boulevard Outlet Shopping Park	2.8	0.0	2.1	0.0	0.0	0.7	2.1
OoC - Banbridge - Other Stores	3.2	0.0	0.9	0.0	0.0	2.2	0.9
OoC - Craigavon	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Craigavon - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Dromore - Other Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OoC - Lurgan	0.7	0.0	0.0	0.7	0.0	0.0	0.7
OoC - Lurgan - Other Stores	0.7	0.0	0.0	0.7	0.0	0.0	0.7
OoC - Portadown	0.3	0.0	0.0	0.0	0.3	0.0	0.0
OoC - Portadown - Other Stores	0.3	0.0	0.0	0.0	0.3	0.0	0.0
OoC - Other	0.3	0.0	0.0	0.3	0.0	0.0	0.3
OoC - All Other Locations	0.3	0.0	0.0	0.3	0.0	0.0	0.3
Outside of ABC BC	68.5	4.7	6.7	10.5	8.5	38.1	21.9
Belfast	16.2	1.2	2.6	8.3	0.0	4.1	12.1
Dungannon	3.2	0.0	0.0	0.0	3.2	0.0	0.0
Lisburn	12.4	0.2	1.6	1.8	0.0	8.9	3.6
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newry	31.7	2.9	2.3	0.0	1.4	25.1	5.1
Other Locations in Northern Ireland	4.7	0.2	0.2	0.4	3.9	0.0	0.8
Republic of Ireland	0.2	0.2	0.0	0.0	0.0	0.0	0.2
Total	147.5	21.8	20.9	45.5	13.7	45.5	88.3

Note: Figures may not add up due to rounding

Table 17a: Comparison goods market share derived turnover (based on household survey results)

	% Market Share	2022 Survey Turnover (£m)	2025 Survey Turnover (£m)	2030 Survey Turnover (£m)	2035 Survey Turnover (£m)
TOTAL Study Area (£m)		1232.4	1327.0	1522.3	1770.2
Armagh Built-Up Area	7.6%	93.8	101.0	115.9	134.7
Banbridge Built-Up Area	11.7%	143.6	154.6	177.4	206.3
Craigavon Built-Up Area	15.6%	191.8	206.5	236.9	275.4
Lurgan Built-Up Area	6.0%	74.1	79.8	91.6	106.5
Portadown Built-Up Area	9.2%	113.1	121.7	139.7	162.4
Other Areas in ABC BC	4.7%	57.9	62.3	71.5	83.1
ABC BC	54.7%	674.2	725.9	832.8	968.4

Notes:
a. Market Share percentage figures are derived from Table 16a. This is then applied to the total comparison goods expenditure available (excluding SFT) as taken from Table 7b
b. By reference to Table 16.
•Armagh Built-Up Area includes Armagh CC and OoC – Armagh;
•Banbridge Built-Up Area includes Banbridge TC and OoC - Banbridge
•Craigavon Built-Up Area includes Craigavon TC and OoC - Craigavon
•Lurgan Built-Up Area includes Legahory DC and OoC - Lurgan
•Portadown Built-Up Area includes Portadown TC and OoC - Portadown
•Other Areas in ABC BC includes Dromore LTC, Gilford LTC, Keady LTC, Legahory DC, Markethill LTC, Rathfriland LTC, Tandragee LTC, OoC - Other

Table 17b: Comparison goods market share derived turnover, and assumed inflow from outside of the Study Area (£m)

	Estimated 'Inflow' from Outside Study Area	2022 Turnover with Inflow (£m)	2025 Turnover with Inflow (£m)	2030 Turnover with Inflow (£m)	2035 Turnover with Inflow (£m)
Armagh Built-Up Area	7.0%	100.4	108.1	124.0	144.2
Banbridge Built-Up Area	4.0%	149.3	160.8	184.5	214.5
Craigavon Built-Up Area	4.0%	199.4	214.7	246.3	286.5
Lurgan Built-Up Area	4.0%	77.1	83.0	95.2	110.8
Portadown Built-Up Area	5.0%	118.7	127.8	146.6	170.5
Other Areas in ABC BC	2.0%	59.0	63.5	72.9	84.8
ABC BC		704.0	758.0	869.6	1011.2

Notes:
a. The inflow percentages have been estimated by Nexus. The inflow figures are then applied to the survey turnover as presented in Table 17a

Table 17c: Extant comparison goods commitments in ABC BC

Site Address	Location	Application Reference	Summary of the Proposal	Net* Comparison Floorspace (sqm)	Estimated Sales Density (£ per sq m) at 2022	Estimated Comparison Turnover (£ m) - 2022	Estimated Comparison Turnover (£ m) - 2025	Estimated Comparison Turnover (£ m) 2030	Estimated Comparison Turnover (£ m) 2035
Lands adjacent to College Street and Lonsdale Road adjacent to nort-west of the hall at no.12 College street and opposite nos 7 - 25 College Street and Armagh Court House. Armagh	Armagh Built-Up Area	LA08/2020/1565/F	Home Bargains	358	4800	1.7	1.8	2.1	2.3
Armagh City Shopping Centre	Armagh Built-Up Area	LA08/2017/1551/F	Extension of shopping centre to form an additional retail unit.	229	4800	1.1	1.2	1.3	1.5
Lands north of Millennium Way and South of Shaerf Drive, Lurgan.	Lurgan Built-Up Area	LA08/2018/1641/F	Home Bargains	790	4800	3.8	4.1	4.6	5.2
Bridgewater Retail Park, Banbridge	Banbridge Urban Area	LA08/2021/1069/F	1 Retail Warehouse Unit (Bulky Goods)	986	4800	4.7	5.1	5.7	6.5
Fane Valley Store, Rathfriland Road, Banbridge, BT32 4LN	Banbridge Urban Area	LA08/2018/0597/F	Extension to Fane Valley Store	202	4800	1.0	1.0	1.2	1.3
Unit 31/32, The Boulevard Outlet, Banbrige	Banbridge Built-Up Area	LA08/2017/0387/F	Change of use from interactive science discovery centre (leisure) to retail floorspace.	483	4800	2.3	2.5	2.8	3.2
Armagh Built-Up Area						2.8	3.0	3.4	3.8
Banbridge Built-Up Area						8.0	8.6	9.6	10.9
Craigavon Built-Up Area						0.0	0.0	0.0	0.0
Lurgan Built-Up Area						3.8	4.1	4.6	5.2
Portadown Built-Up Area						0.0	0.0	0.0	0.0
Other Areas in ABC BC						0.0	0.0	0.0	0.0
ABC BC				3048		14.6	15.6	17.6	20.0

Notes:
a. The list of commitments and the associated net sales areas have been provided by the Council.
b. Sales density is assumed to be £ 4,800 based on Nexus Planning judgement.
c. The turnover for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 19.

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Table 18a: ABC BC - Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£704.0	£758.0	£869.6	£1,011.2
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£704.0	£752.2	£845.2	£961.0
STEP 3:	Available Expenditure before commitments (£m)		£5.8	£24.3	£50.2
STEP 4:	Turnover of all committed floorspace (£m)		£15.6	£17.6	£20.0
STEP 5:	Surplus Expenditure (£m)		-£9.9	£6.7	£30.2
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-2,638	1,604	6,322
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-3,769	2,291	9,032
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-1,679	1,021	4,023
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-2,398	1,458	5,747

Notes

STEP 1: Survey Derived (with Inflow) turnovers assume constant market shares over the forecast period, derived from Table 17b.

STEP 2: Assumption is made that comparison retail market is in 'equilibrium' at the base year (i.e. 2022, 'benchmark' turnovers are equivalent to the survey-derived turnover levels, with inflow). Average productivity growth rates from Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 19, are then used to project the available benchmark expenditure.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 17c. It is assumed that all commitments would be operational and with mature trading conditions by 2025.

STEP 5: The Surplus Expenditure capacity incorporates the forecast turnover of all commitments (Step 4).

STEP 6: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £3,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in ABC BC. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 19.

STEP 7: The Surplus Expenditure is converted into a net/gross floorspace capacity, based on Nexus judgement. Average sales density is assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in ABC BC. The sales density for respective years is "grown" using Figure 4b (density growth rate) of Experian Retail Planner Briefing Note 19.

Table 18b: Armagh Built-Up Area - Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£100.4	£108.1	£124.0	£144.2
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£100.4	£107.2	£120.5	£137.0
STEP 3:	Available Expenditure before commitments (£m)		£0.8	£3.5	£7.2
STEP 4:	Turnover of all committed floorspace (£m)		£3.0	£3.4	£3.8
STEP 5:	Surplus Expenditure (£m)		-£2.2	£0.1	£3.3
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-372	12	440
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-532	18	629
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-585	20	692
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-836	28	989

Table 18c: Banbridge Built-Up Area - Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£149.3	£160.8	£184.5	£214.5
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£149.3	£159.6	£179.3	£203.9
STEP 3:	Available Expenditure before commitments (£m)		£1.2	£5.2	£10.6
STEP 4:	Turnover of all committed floorspace (£m)		£8.6	£9.6	£10.9
STEP 5:	Surplus Expenditure (£m)		-£7.3	-£4.5	-£0.3
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-1,250	-677	-40
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-1,786	-968	-58
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-1,965	-1,065	-64
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-2,806	-1,521	-91

Table 18d: Craigavon Built-Up Area - Comparison Goods Capacity Assessment

Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£199.4	£214.7	£246.3	£286.5
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£199.4	£213.1	£239.5	£272.2
STEP 3:	Available Expenditure before commitments (£m)		£1.6	£6.9	£14.2
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		£1.6	£6.9	£14.2
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		278	1,043	1,893
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		397	1,490	2,705
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		437	1,639	2,975
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		624	2,341	4,250

Table 18e: Lurgan Built-Up Area - Comparison Goods Capacity Assessment
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£77.1	£83.0	£95.2	£110.8
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£77.1	£82.4	£92.6	£105.3
STEP 3:	Available Expenditure before commitments (£m)		£0.6	£2.7	£5.5
STEP 4:	Turnover of all committed floorspace (£m)		£4.1	£4.6	£5.2
STEP 5:	Surplus Expenditure (£m)		-£3.4	-£1.9	£0.3
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		-582	-286	43
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-831	-409	61
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		-915	-450	67
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-1,306	-643	96

Table 18f: Portadown Built-Up Area - Comparison Goods Capacity Assessment
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£118.7	£127.8	£146.6	£170.5
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£118.7	£126.9	£142.5	£162.1
STEP 3:	Available Expenditure before commitments (£m)		£1.0	£4.1	£8.5
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		£1.0	£4.1	£8.5
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		165	621	1,127
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		236	887	1,610
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		260	975	1,771
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		372	1,393	2,530

Table 18g: Other Areas in ABC BC - Comparison Goods Capacity Assessment
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035
STEP 1:	Survey Derived (with Inflow) Turnover of all Floorspace (£m):	£59.0	£63.5	£72.9	£84.8
STEP 2:	Total Forcast "Benchmark" Turnover of all Floorspace (£m)	£59.0	£63.1	£70.8	£80.6
STEP 3:	Available Expenditure before commitments (£m)		£0.5	£2.0	£4.2
STEP 4:	Turnover of all committed floorspace (£m)		£0.0	£0.0	£0.0
STEP 5:	Surplus Expenditure (£m)		£0.5	£2.0	£4.2
STEP 6:	MAXIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500.0	£5,876.8	£6,603.7	£7,508.0
	(ii) MAXIMUM "Net" Floorspace Capacity (sq m):		82	309	560
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		118	441	800
STEP 7:	MINIMUM FORECAST CAPACITY FOR NEW COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£3,500.0	£3,739.8	£4,202.4	£4,777.8
	(ii) MINIMUM "Net" Floorspace Capacity (sq m):		129	485	880
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		185	693	1,258