

Appendix 2: Convenience Goods Analysis

Table 1 Study Area Population

Zone	2011	2016	2021	2026	2031
Zone 1 - Merthyr Tydfil North	32,516	33,075	33,809	34,635	35,579
Zone 2 - Merthyr Tydfil South	30,923	31,454	32,153	32,938	33,836
Zone 3 - Aberdare	39,173	39,717	40,103	40,521	40,845
Zone 4 - Pontypridd	57,907	58,711	59,281	59,900	60,379
Zone 5 - Blackwood	75,226	75,941	76,501	76,916	76,998
Zone 6 - Ebbw Vale	55,468	55,259	55,023	54,669	54,044
Zone 7 - Brecon	19,494	19,381	19,235	19,038	18,717
Total	310,707	313,538	316,105	318,618	320,399

Sources:

Experian 2011 Census of Population

Merthyr Tydfil County Borough LDP Preferred Strategy population projections (Zones 1 and 2)

Welsh Assembly Population Projections 2014 based local authority projections

Table 2 Convenience Goods Expenditure per person per annum (£)

Zone	2016	2021	2026	2031
Zone 1 - Merthyr Tydfil North	1,685	1,651	1,644	1,645
Zone 2 - Merthyr Tydfil South	1,773	1,737	1,730	1,731
Zone 3 - Aberdare	1,811	1,774	1,767	1,768
Zone 4 - Pontypridd	1,858	1,820	1,812	1,814
Zone 5 - Blackwood	1,811	1,774	1,767	1,768
Zone 6 - Ebbw Vale	1,807	1,771	1,763	1,764
Zone 7 - Brecon	2,047	2,005	1,997	1,998

Sources:

Experian Local Expenditure 2015 (2015 prices)

Growth Rates: -1.1% 2014-2015, 0% 2015-2016, -0.2% 2016-2017, -0.9% 2017 to 2018, 0% p.a. from 2019 to 2023 and 0.1% from 2024

Excludes Special Forms of Trading

Table 3 Total Convenience Goods Expenditure (£m)

Zone	2016	2021	2026	2031
Zone 1 - Merthyr Tydfil North	£55.73	£55.82	£56.94	£58.53
Zone 2 - Merthyr Tydfil South	£55.77	£55.85	£56.98	£58.57
Zone 3 - Aberdare	£71.93	£71.14	£71.60	£72.21
Zone 4 - Pontypridd	£109.08	£107.89	£108.54	£109.53
Zone 5 - Blackwood	£137.53	£135.71	£135.91	£136.13
Zone 6 - Ebbw Vale	£99.85	£97.45	£96.38	£95.33
Zone 7 - Brecon	£39.67	£38.57	£38.02	£37.40
Study Area Total	£569.57	£562.43	£564.37	£567.70

Source: Tables 1 and 2

Table 4 Base Year 2016 Convenience Goods Market Shares (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Aldi, Merthyr	14.5%	13.9%	3.4%	0.3%	4.5%	0.9%	0.4%	5.0%
Asda, Merthyr	37.8%	13.0%	0.9%	0.6%	1.2%	11.8%	2.4%	10.0%
Lidl, Penygarnddu, Merthyr	6.4%	1.9%	0.2%	0.0%	0.0%	3.1%	0.0%	5.0%
Tesco Extra, Merthyr	25.7%	20.0%	3.6%	0.5%	0.8%	1.5%	2.8%	10.0%
Other Merthyr Tydfil Zone 1	8.3%	12.0%	0.2%	0.9%	0.0%	0.8%	0.5%	5.0%
Pentrebach	0.4%	3.0%	0.0%	0.7%	0.0%	0.0%	0.0%	5.0%
Treharris	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Merthyr Tydfil Zone 2	4.3%	2.3%	1.2%	1.8%	0.4%	2.1%	2.3%	15.0%
Merthyr Tydfil Total	97.4%	72.0%	9.5%	4.8%	6.9%	20.2%	8.4%	
Zone 2 - Nelson	0.0%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	
Zone 3 - Aberdare	0.3%	3.1%	85.7%	7.0%	0.8%	0.2%	0.5%	
Zone 4 - Pontypridd	1.2%	6.5%	1.7%	67.3%	9.0%	0.7%	0.0%	
Zone 5 - Blackwood	0.0%	7.7%	0.0%	1.7%	71.5%	0.9%	0.6%	
Zone 6 - Ebbw Vale	0.9%	0.0%	0.3%	2.6%	1.6%	76.3%	0.4%	
Zone 7 - Brecon	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	80.8%	
Outside Study Area	0.0%	7.6%	2.8%	16.2%	10.2%	1.2%	9.3%	
Other Total	2.6%	28.0%	90.5%	95.2%	93.1%	79.8%	91.6%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey December 2016 (weighted results)

Table 5 Base Year 2016 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2016	55.73	55.77	71.93	109.08	137.53	99.85	39.67		569.57
Aldi, Merthyr	8.08	7.75	2.45	0.33	6.19	0.90	0.16	1.36	27.21
Asda, Merthyr	21.07	7.25	0.65	0.65	1.65	11.78	0.95	4.89	48.89
Lidl, Penygarnddu, Merthyr	3.57	1.06	0.14	0.00	0.00	3.10	0.00	0.41	8.28
Tesco Extra, Merthyr	14.32	11.15	2.59	0.55	1.10	1.50	1.11	3.59	35.91
Other Merthyr Tydfil Zone 1	4.63	6.69	0.14	0.98	0.00	0.80	0.20	0.71	14.15
Pentrebach	0.22	1.67	0.00	0.76	0.00	0.00	0.00	0.14	2.80
Treharris	0.00	3.29	0.00	0.00	0.00	0.00	0.00	0.17	3.46
Other Merthyr Tydfil Zone 2	2.40	1.28	0.86	1.96	0.55	2.10	0.91	1.78	11.84
Merthyr Tydfil Total	54.28	40.15	6.83	5.24	9.49	20.17	3.33	13.05	152.55
Zone 2 - Nelson	0.00	1.73	0.00	0.44	0.00	0.00	0.00		2.17
Zone 3 - Aberdare	0.17	1.73	61.64	7.64	1.10	0.20	0.20		72.67
Zone 4 - Pontypridd	0.67	3.62	1.22	73.41	12.38	0.70	0.00		92.01
Zone 5 - Blackwood	0.00	4.29	0.00	1.85	98.33	0.90	0.24		105.62
Zone 6 - Ebbw Vale	0.50	0.00	0.22	2.84	2.20	76.19	0.16		82.10
Zone 7 - Brecon	0.11	0.00	0.00	0.00	0.00	0.50	32.06		32.67
Outside Study Area	0.00	4.24	2.01	17.67	14.03	1.20	3.69		42.84
Other Sub-Total	1.45	15.62	65.09	103.85	128.04	79.68	36.34		430.07
TOTAL	55.73	55.77	71.93	109.08	137.53	99.85	39.67		582.62

Source: Table 3 and 4

Table 6 Future 2021 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	55.82	55.85	71.14	107.89	135.71	97.45	38.57		562.43
Aldi, Merthyr	8.09	7.76	2.42	0.32	6.11	0.88	0.15	1.35	27.09
Asda, Merthyr	21.10	7.26	0.64	0.65	1.63	11.50	0.93	4.86	48.56
Lidl, Penygarnddu, Merthyr	3.57	1.06	0.14	0.00	0.00	3.02	0.00	0.41	8.21
Tesco Extra, Merthyr	14.35	11.17	2.56	0.54	1.09	1.46	1.08	3.58	35.83
Other Merthyr Tydfil Zone 1	4.63	6.70	0.14	0.97	0.00	0.78	0.19	0.71	14.13
Pentrebach	0.22	1.68	0.00	0.76	0.00	0.00	0.00	0.14	2.79
Treharris	0.00	3.30	0.00	0.00	0.00	0.00	0.00	0.17	3.47
Other Merthyr Tydfil Zone 2	2.40	1.28	0.85	1.94	0.54	2.05	0.89	1.76	11.71
Merthyr Tydfil Total	54.37	40.21	6.76	5.18	9.36	19.68	3.24	12.98	151.78
Zone 2 - Nelson	0.00	1.73	0.00	0.43	0.00	0.00	0.00		2.16
Zone 3 - Aberdare	0.17	1.73	60.97	7.55	1.09	0.19	0.19		71.89
Zone 4 - Pontypridd	0.67	3.63	1.21	72.61	12.21	0.68	0.00		91.02
Zone 5 - Blackwood	0.00	4.30	0.00	1.83	97.03	0.88	0.23		104.28
Zone 6 - Ebbw Vale	0.50	0.00	0.21	2.81	2.17	74.35	0.15		80.20
Zone 7 - Brecon	0.11	0.00	0.00	0.00	0.00	0.49	31.16		31.76
Outside Study Area	0.00	4.24	1.99	17.48	13.84	1.17	3.59		42.31
Other Sub-Total	1.45	15.64	64.38	102.71	126.35	77.76	35.33		423.62
TOTAL	55.82	55.85	71.14	107.89	135.71	97.45	38.57		575.41

Source: Table 3 and 4

Table 7 Future 2026 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	56.94	56.98	71.60	108.54	135.91	96.38	38.02		564.37
Aldi, Merthyr	8.26	7.92	2.43	0.33	6.12	0.87	0.15	1.37	27.44
Asda, Merthyr	21.52	7.41	0.64	0.65	1.63	11.37	0.91	4.90	49.05
Lidl, Penygarnddu, Merthyr	3.64	1.08	0.14	0.00	0.00	2.99	0.00	0.41	8.27
Tesco Extra, Merthyr	14.63	11.40	2.58	0.54	1.09	1.45	1.06	3.64	36.39
Other Merthyr Tydfil Zone 1	4.73	6.84	0.14	0.98	0.00	0.77	0.19	0.72	14.36
Pentrebach	0.23	1.71	0.00	0.76	0.00	0.00	0.00	0.14	2.84
Treharris	0.00	3.36	0.00	0.00	0.00	0.00	0.00	0.18	3.54
Other Merthyr Tydfil Zone 2	2.45	1.31	0.86	1.95	0.54	2.02	0.87	1.77	11.78
Merthyr Tydfil Total	55.46	41.03	6.80	5.21	9.38	19.47	3.19	13.13	153.67
Zone 2 - Nelson	0.00	1.77	0.00	0.43	0.00	0.00	0.00		2.20
Zone 3 - Aberdare	0.17	1.77	61.36	7.60	1.09	0.19	0.19		72.37
Zone 4 - Pontypridd	0.68	3.70	1.22	73.05	12.23	0.67	0.00		91.56
Zone 5 - Blackwood	0.00	4.39	0.00	1.85	97.18	0.87	0.23		104.50
Zone 6 - Ebbw Vale	0.51	0.00	0.21	2.82	2.17	73.54	0.15		79.42
Zone 7 - Brecon	0.11	0.00	0.00	0.00	0.00	0.48	30.72		31.31
Outside Study Area	0.00	4.33	2.00	17.58	13.86	1.16	3.54		42.47
Other Sub-Total	1.48	15.96	64.80	103.33	126.53	76.91	34.82		423.84
TOTAL	56.94	56.98	71.60	108.54	135.91	96.38	38.02		577.51

Source: Table 3 and 4

Table 8 Future 2031 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	58.53	58.57	72.21	109.53	136.13	95.33	37.40		567.70
Aldi, Merthyr	8.49	8.14	2.46	0.33	6.13	0.86	0.15	1.40	27.94
Asda, Merthyr	22.12	7.61	0.65	0.66	1.63	11.25	0.90	4.98	49.81
Lidl, Penygarnddu, Merthyr	3.75	1.11	0.14	0.00	0.00	2.96	0.00	0.42	8.38
Tesco Extra, Merthyr	15.04	11.71	2.60	0.55	1.09	1.43	1.05	3.72	37.19
Other Merthyr Tydfil Zone 1	4.86	7.03	0.14	0.99	0.00	0.76	0.19	0.74	14.70
Pentrebach	0.23	1.76	0.00	0.77	0.00	0.00	0.00	0.15	2.90
Treharris	0.00	3.46	0.00	0.00	0.00	0.00	0.00	0.18	3.64
Other Merthyr Tydfil Zone 2	2.52	1.35	0.87	1.97	0.54	2.00	0.86	1.78	11.89
Merthyr Tydfil Total	57.01	42.17	6.86	5.26	9.39	19.26	3.14	13.36	156.45
Zone 2 - Nelson	0.00	1.82	0.00	0.44	0.00	0.00	0.00		2.25
Zone 3 - Aberdare	0.18	1.82	61.89	7.67	1.09	0.19	0.19		73.01
Zone 4 - Pontypridd	0.70	3.81	1.23	73.71	12.25	0.67	0.00		92.37
Zone 5 - Blackwood	0.00	4.51	0.00	1.86	97.34	0.86	0.22		104.79
Zone 6 - Ebbw Vale	0.53	0.00	0.22	2.85	2.18	72.74	0.15		78.66
Zone 7 - Brecon	0.12	0.00	0.00	0.00	0.00	0.48	30.22		30.81
Outside Study Area	0.00	4.45	2.02	17.74	13.89	1.14	3.48		42.72
Other Sub-Total	1.52	16.40	65.35	104.27	126.74	76.08	34.26		424.62
TOTAL	58.53	58.57	72.21	109.53	136.13	95.33	37.40		581.06

Source: Table 3 and 4

Table 9 Convenience Goods Floorspace and Benchmark Turnover 2016

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Merthyr Tydfil Zone 1	Aldi	787	90%	708	£11,557	£8.19
	Asda	7,240	50%	3,620	£15,213	£55.07
	Iceland, St. Tydfil Square	364	95%	346	£8,045	£2.78
	Lidl, Penygarnddu	1,578	80%	1,262	£7,723	£9.75
	Tesco Extra	4,488	65%	2,917	£11,058	£32.26
	Farmfoods	654	95%	621	£7,000	£4.35
	Other Merthyr Tydfil town centre	1,300	100%	1,300	£5,000	£6.50
	Other Zone 1	1,300	100%	1,300	£4,000	£5.20
	Sub Total	17,711		12,075		£124.10
Merthyr Tydfil Zone 2	Iceland, Pentrebach	418	95%	397	£8,045	£3.19
	Co-op, Pentrebach	1,697	85%	1,442	£8,903	£12.84
	Treharris	620	100%	620	£4,000	£2.48
	Other Zone 2	500	100%	500	£4,000	£2.00
	M&S Cyfarthfa	873	95%	829	£10,474	£8.69
	Sub-Total	4,108		3,789		£29.20
TOTAL		21,819		15,864		£153.30

Source: MTBC land use survey 2016, VOA, ORC StorePoint and Mintel

Table 10

Convenience Goods Floorspace Capacity

Area	2016	2021	2026	2031
Available Expenditure (£M)	152.55	151.78	153.67	156.45
Benchmark Turnover of Existing Facilities (£M)	153.30	153.30	153.30	153.30
Surplus/Deficit Expenditure (£M)	-0.75	-1.51	0.37	3.15
Turnover Density New Floorspace (£ psm)	£11,000	£11,000	£11,000	£11,000
Floorspace Projection (Sq.M net)	-68	-138	34	286
Floorspace Projection (Sq.M gross)	-98	-197	49	409

Source: Tables 5 to 9