Barking and Dagenham Retail and Town Centre Study Addendum

London Borough of Barking and Dagenham

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Appendices

1.0 Introduction

1.1 Lichfields was commissioned by the London Borough of Barking and Dagenham (LBBD) to prepare the Borough wide Economic Development Study May 2014 (EDS). A partial update of the EDS, relating to retail and leisure uses was prepared in September 2019. This report provides an addendum to the 2019 Update.

1.2 This addendum updates the retail and food/beverage floorspace projections adopting Experian's latest (post Brexit) forecasts for consumer expenditure, home shopping/special forms of trading (SFT) and sales density growth as published in February 2020 (Retail Planner Briefing Note 17).

1.3 The updated floorspace capacity projections are summarised in in Section 2 of this report, and the revised capacity model tables are shown in Appendix 2, 3 and 4.

1.4 Section 3 of this addendum also includes a review of the draft Regulation 19 Local Plan policies and supporting text in terms of their conformity with the new NPPF, New London Plan and the previous policy review and recommendations set out in the 2019 Update. The following draft policies include elements relevant to retail and town centres:

SP5 (part) - Promoting inclusive economic growth;

Figure 2 - LBBD town centre hierarchy;

DME 3- Encouraging vibrant, resilient and characterful town centres;

DME 4 - Over-concentration of hot food takeaways, betting shops and pay day loan shops;

DME 5 - Visitor accommodation; and

DME 6 - Evening Economy.

2.0 Updated floorspace capacity assessment

2.1 This section updates the quantitative scope for new retail floorspace in LBBD in the period from 2019 to 2034. The updated projections adopt Experian's latest forecasts for expenditure, special forms of trading (SFT) and sales density growth.

Expenditure forecasts

2.1 All monetary values expressed in this update report are at 2017 prices, consistent with previous 2019 Update report.

2.2 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 17 – February 2020) has been used to forecast expenditure within the study area. Experian's EBS growth forecast rates for 2018 to 2021 reflect recent post-Brexit economic circumstances, but do not take account of the current Covid-19 crisis. The forecast changes are as follows:

- convenience goods: -0.4% for 2018 to 2019, 0% for 2019 to 2020 and 0.5% from 2020 to 2021;
- comparison goods: 3.9% for 2018 to 2019, 3.0% for 2019 to 2020 and 3.2% from 2020 to 2021;
- leisure: -0.5% for 2018 to 2019, 0.9% for 2019 to 2020 and 1.0% from 2020 to 2021.

2.3 These short term forecasts, particularly for comparison goods and leisure, may be optimistic in the light of the coronavirus crisis.

2.4 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium term growth average forecasts have been adopted (2022 to 2026), as follows:

- convenience goods: 0.1% per annum after 2021;
- comparison goods: 3.2% per annum growth after 2021; and
- leisure: 1.2% per annum after 2021.

2.5 These growth figures relate to real growth and exclude inflation.

2.6 Experian's latest adjusted deductions for SFT in 2018 are:

- 3.8% of convenience goods expenditure; and
- 16.8% of comparison goods expenditure.

2.7 The projections provided by Experian suggest that these percentages could increase to 6.6% and 25.2% by 2034 respectively.

2.8 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2034. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.

2.9 As a consequence of growth in population and per capita spending, total convenience goods spending within the study area is forecast to increase by 26% from £772.65 million in 2019 to £975.9 million in 2034, as shown in Table 3 (Appendix 2).

2.10 Comparison goods spending is forecast to increase by 83% between 2019 and 2034, increasing from £1,021.35 million in 2019 to £1,865 million in 2034, as shown in Table 3 (Appendix 3).

2.11 Food and beverage spending is forecast to increase by 51% between 2019 and 2034, increasing from £361.87 million in 2019 to £546.04 million in 2034, as shown in Table 3 (Appendix 4).

Increases in turnover densities

2.12 Experian's Retail Planner Briefing Note 17, February 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by 3.6% per annum during 2020 and 2021; 3.2% per annum during 2022 to 2026 and 2.7% per annum beyond 2026. These increases have been adopted and will absorb much of the future expenditure growth.

2.13 For convenience goods retail, Experian indicates sales floorspace is expected to increase its average sales density by 0.3% during 2020, 0.5% during 2021 and 0% growth beyond 2021.

2.14 Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, consistent with the 2019 Update.

Capacity for convenience goods floorspace

2.15 Taking commitments into account, available convenience goods expenditure has been projected forward to 2024, 2029 and 2034, and is summarised in Table 12 in Appendix 2. Convenience expenditure available to facilities within the Borough is expected to increase from £406.06 million in 2019 to £531.01 million in 2034. Growth rate in turnover efficiency has been adopted, as recommended by Experian (Retail Planner Briefing Note 17 – February 2020).

2.16 Table 12 subtracts the benchmark turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the Borough, there is a projected convenience goods expenditure deficit of -£31.31 million at 2024, due to the implementation of commitments. Continued expenditure growth creates a small surplus of +£9.5 million at 2029, increasing to a surplus of +£61.48 million by 2034. The comparable 2034 projection in the 2019 Update was marginally higher at +£64.47 million.

2.17 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 13 in Appendix 2 and summarised in Table 2.1 below.

Table 2.1 Convenience Goods Floorspace Capacity (sq.m gross)

Area	2024	2029	2034
Barking (Zone 1 - West)	-1,725	274	3,574
Dagenham (Zone 2)	1,155	2,622	3,648
Chadwell Heath (Zone 3)	-519	-327	-129
Green Lane (Zone 3)	-2,309	-1,724	-1,029
Barking Riverside (Zone 1 – East)	-299	276	1,198
Total	**-3,698**	**1,122**	**7,261**

Source: Table 13, Appendix 2

2.18 Surplus expenditure up to 2029 indicates that there is a small medium-term requirement for additional convenience goods floorspace in the Borough of 1,122 sq.m gross at 2029 but increasing to 7,261 sq.m gross by 2034, primarily due to population growth. The 2019 Update suggested a similar projection of 7,486 sq.m gross by 2034.

Capacity for comparison goods floorspace

2.19 Taking commitments into account, available comparison goods expenditure has been projected forward to 2024, 2029 and 2034, and is summarised in Table 12 in Appendix 3. Comparison goods expenditure available to facilities within the Borough is expected to increase from £187.74 million in 2019 to £383.71 million in 2034.

2.20 Table 12 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. Within the Borough, there is an expenditure deficit up to 2029, if commitments are implemented. By 2034 there will be an expenditure surplus of +£22 million. The comparable 2034 projection in the 2019 Update was higher at +£60.11 million.

2.21 Surplus comparison expenditure has been converted into comparison goods floorspace projections in Table 13 in Appendix 3, as summarised in Table 2.2 below.

Table 2.2 Comparison Goods Floorspace Capacity (sq.m gross)

Area	2024	2029	2034
Barking (Zone 1 - West)	-3,630	-1,658	2,193
Dagenham (Zone 2)	-2,769	-1,345	-194
Chadwell Heath (Zone 3)	-254	-106	176
Green Lane (Zone 3)	-85	18	181
Barking Riverside (Zone 1 – East)	-620	95	1,418
Total	**-7,358**	**-2,997**	**3,774**

Source: Table 13, Appendix 3

2.22 The surplus of available expenditure up to 2029 indicates there is no medium-term requirement for additional comparison goods floorspace in the Borough, over and above commitments. There is a small long-term requirement for 3,774 sq.m gross by 2034. The 2019 Update suggested a higher projection of 11,122 sq.m gross by 2034, due to higher expenditure growth and lower forecast increases in SFT and sales densities.

Capacity for food/beverage floorspace

2.23 Available food and beverage expenditure has been projected forward to 2024, 2029 and 2034, and is summarised in Table 12, Appendix 4. The amount of expenditure attracted to the Borough is expected to increase from £85.35 million in 2019 to £143.31 million in 2034. Surplus expenditure growth projections are shown in Table 13 in Appendix 4 and summarised in Table 2.3 below. The projections in Table 2.3 are over and above commitments.

Table 2.3 Food and Beverage Floorspace Capacity (sq.m gross)

Area	2024	2029	2034
Barking (Zone 1 - West)	-1,698	-1,053	155
Dagenham (Zone 2)	-614	124	687
Chadwell Heath/Green Lane (Zone 3)	-120	280	769
Barking Riverside (Zone 1 – East)	-713	-244	472
Total	**-3,144**	**-892**	**2,084**

Source: Table 13, Appendix 4

2.24 The surplus of available expenditure up to 2029 indicates there is no medium-term requirement for additional food/beverage floorspace in the Borough, over and above commitments. There is a small long-term requirement for 2,084 sq.m gross by 2034. The 2019 Update suggested a slightly higher projection of 2,693 sq.m gross by 2034.

Accommodating growth

2.25 The capacity assessment for new retail floorspace suggests there is some limited scope for new retail development within LBBD, over and above commitments during the study period up to 2034. Tables 2.4 and 2.5 below summarise the floorspace requirements in LBBD to 2029 and 2034, again over and above commitments. If implemented, planned commitments (with planning permission) are expected to provide around 22,700 sq.m gross of Class A1 to A5 floorspace.

Table 2.4 Summary of Class A1, A3 to A5 Floorspace Requirements up to 2029 (sq.m gross)

Area	A1 Convenience (sq.m gross)	A1 Comparison (sq.m gross)	A3-A5 Food/beverage (sq.m gross)	Total (sq.m gross)
Barking (Zone 1 - West)	274	-1,658	-1,053	-2,347
Dagenham (Zone 2)	2,622	-1,345	124	1,401
Chadwell Heath/Green Lane (Zone 3)	-2,051	-88	280	-1,859
Barking Riverside (Zone 1 - East)	276	95	-244	127
Total	**1,122**	**-2,997**	**-892**	**-2,767**

Source: Table 13, Appendix 2; Table 13, Appendix 3; and Table 13, Appendix 4

Table 2.5 Summary of Class A1, A3 to A5 Floorspace Requirements up to 2034 (sq.m gross)

Area	A1 Convenience (sq.m gross)	A1 Comparison (sq.m gross)	A3-A5 Food/beverage (sq.m gross)	Total (sq.m gross)
Barking (Zone 1 - West)	3,574	2,193	155	5,922
Dagenham (Zone 2)	3,648	-194	687	4,141
Chadwell Heath/Green Lane (Zone 3)	-1,158	357	769	-32
Barking Riverside (Zone 1 - East)	1,198	1,418	472	3,088
Total	**7,262**	**3,774**	**2,084**	**13,120**

Source: Table 13, Appendix 2; Table 13, Appendix 3; and Table 13, Appendix 4

2.26 As indicated in the 2019 Update, vacant premises should help to accommodate some future growth. If the existing shop vacancy rate reduced to 4% then re-occupied vacant space could accommodate the following new floorspace:

- Dagenham Heathway 600 sq.m gross
- Chadwell Heath 300 sq.m gross
- Green Lane 100 sq.m gross
- Local centres/parades – Zone 2 1,800 sq.m gross
- Local centres/parades – Zone 3 600 sq.m gross

2.27 Reoccupied vacant shop units in total could accommodate up to 3,400 sq.m gross. If this reduction in vacant units can be achieved, then the overall Class A1 to A5 floorspace projection for LBBD up to 2034 will reduce from about 13,100 sq.m gross to 9,700 sq.m gross. The four main centres are likely to remain the focus for Class A1 comparison goods retail use, particularly in Barking town centre.

2.28 Development opportunities in Barking Town Centre, not currently committed, that could accommodate longer term residual growth include:

- Barking Station, Barking Town Centre; and
- London Road/Linton Road/George Street, Barking Town Centre.

2.29 Development opportunity sites in Barking Town Centre could physically accommodate over 10,000 sq.m gross of Class A1 to A5 uses and could accommodate the long-term (2034) floorspace projection.

2.30 In Dagenham (Zone 2) the re-occupation of vacant floorspace (up to 2,400 sq.m gross) would leave residual new floorspace of about 1,700 sq.m gross by 2034. Given the limited development opportunities to accommodate growth in Dagenham Heathway, it may be appropriate to direct longer-term residual floorspace capacity towards the major housing growth area at Barking Riverside.

2.31 In Chadwell Heath and Green Lane (Zone 3) the reoccupation of vacant units in local centres/parades in Zone 3 (1,000 sq.m gross) would leave limited scope for further new floorspace by 2034. There is no need to allocate sites for Class A1 to A5 use within Zone 3.

Employment

2.32 The Homes and Communities Agency' Employment Density Guide 2010 suggests the following employment densities (full time equivalent – FTE jobs):

- Class A1 retail (high street) one FTE per 19 sq.m (NIA)
- Class A1 retail (food superstores) one FTE per 17 sq.m (NIA)
- Class A1 retail (other superstores/retail warehouses) one FTE per 90 sq.m (NIA)
- Class A3 (restaurants/cafés) one FTE per 18 sq.m (NIA)

2.33 The floorspace capacity projections in this section are gross external area (GEA) figures. The employment densities above relate to net internal area (NIA). An additional 20% has been added to convert the employment densities rates to GEA floorspace.

2.34 New comparison goods retail floorspace is likely to be predominantly high street retailing, reflecting the application of the sequential approach and an employment density of one FTE per 23 sq.m (GEA) has been adopted.

2.35 New convenience goods retail floorspace is likely to be predominantly food store floorspace and an employment density of one FTE per 20 sq.m (GEA) has been adopted. For Class A3-A5 food/beverage floorspace an employment density of one FTE per 22 sq.m (GEA) has been adopted.

2.36 The floorspace capacity projections are over and above commitments. As indicated above, commitments are expected to provide around 22,700 sq.m gross of Class A1 to A5 floorspace. If an average employment density of one FTE per 22 sq.m GEA is adopted, then the implementation of these commitments will generate about 1,030 new FTE jobs.

2.37 The Borough wide projections to 2034, over and above the commitments would generate a further 622 FTE jobs, as follows:

- Class A1 convenience goods floorspace (7,262 sq.m gross) = 363 FTEs;
- Class A1 comparison goods floorspace (3,774 sq.m gross) = 164 FTEs; and
- Class A3-A5 food/beverage floorspace (2,084 sq.m gross) = 95 FTEs.

2.38 The combined contribution of commitments and additional floorspace projections is around 1,650 FTE jobs.

3.0 Policy Review

3.1 This section reviews the draft Regulation 19 Local Plan policies in relation to the conformity with the new NPPF, New London Plan and the previous policy review and recommendations set out in 2019 Update.

3.2 The revised NPPF (February 2019) consolidates a series of proposals that have been made in the last two and half years. In relation to town centres, the revised NPPF does not change the overall aims of policy.

3.3 The New London Plan Intention to Publish (NLPIP) was issued to the Secretary of State in December 2019 and the letter of response to the Mayor was submitted in March 2020. The adoption of the New London Plan will require the production of a modified London Plan. However, most of the modifications will relate to the delivery of housing and do not affect the approach towards town centre uses. In the meantime, the NLPIP policies relating to town centres will carry weight, particularly where they are consistent with the revised NPPF.

Policy SP 5: Promoting economic growth

3.4 Draft Policy SP 5 seeks to deliver 20,000 new jobs and a wider employment base. Any growth in the retail and food/beverage sector should make contributions to these objectives. As indicated in Section 2, the implementation of planned Class A1 to A5 commitments and the additional floorspace capacity projections could generate around 1,650 FTE jobs by 2034. Accommodating the projected floorspace capacity is consistent with the delivery of new jobs and a wider employment base.

3.5 The revised NPPF (February 2019) indicates local authorities are still required to support the role of town centres and policies should focus on defining a network and hierarchy of centres, allowing then to grow and diversify.

3.6 NLPIP Policy E9 requires development plans to identify future requirements and locations for new retail having regard to local evidence of demand and supply. The 2019 Update and this addendum provide an up-to-date assessment of the scale and type of retail floorspace needed and the potential distribution of new development, in line with Policy E9.

3.7 NLPIP Policy SD8 and Annex 1 sets out the network of town centres. NLPIP Annex 1 – Town Centre Network provides guidance on the classification of centres and indicators on the role and function of town and district centres across London. NLPIP Policy SD7 sets out the criteria for assessing the potential for intensification of town centres. The conformity of draft policies with these NLPIP policies is set out below.

3.8 NLPIP Policy SP7 also requires town centre boundaries, PSAs, primary/secondary frontages and the night-time economy of centres to be reviewed in Local Plans. The designations should take account of demand/capacity assessments for town centre uses and housing. If necessary the extent of shopping frontages should be revised where there is a surplus and greater flexibility should be introduced, again based on local circumstances. This implies a centre-by-centre approach.

3.9 Consistent with the NPPF and NLPIP (Policy SD8 and Annex 1), Draft Policy SP 5 also supports the Borough's town centre hierarchy, where a range of appropriate town centres uses, not limited to traditional retail, will be encouraged. The Local Plan will include a Town Centre Hierarchy Map that clearly shows the new hierarchy of centres. A plan showing the main town and district centres is shown overleaf.


Key
Barking and Dagenham Local Authority Boundary
Centres:
Town Centre
1 Barking
District Centre
2 Chadwell Heath
3 Dagenham Heathway
4 Green Lane
Proposed New District Centre
5 Barking Riverside
6 Merrielands Crescent
LICHFIELDS
Project Barking & Dagenham Retail Study
Title Centres
Client London Borough of Barking & Dagenham
Date 21.05.2020
Scale 1:35,000 @ A3
Drawn by MAR
ROMFORD
DAGENHAM
ILFORD
EAST HAM
RAINHAM
1
2
3
4
5
6

3.10 The Borough contains one Major Centre (Barking town centre), three existing District Centres (Dagenham Heathway, Green Lane and Chadwell Heath) and two potential new District Centres (Barking Riverside and Merrielands Crescent). The proposed Town Centre Hierarchy in the emerging Local Plan is consistent with the NLPIP Annex 1. The NLPIP (Policy SD8) also provides indicators for individual centres within the network. The relevant designations are:

Table 3.1 New London Plan – indicators for the network of centre on LB of Barking

	Barking town	Dagenham Heathway	Green Lane	Chadwell Heath	Barking Riverside	Merrielands Crescent
Network classification	Major	District	District	District	New District	New District
Night-time classification	NT3 local significance	n/a	n/a	n/a	n/a	n/a
Commercial growth potential	Medium	Low	Low	Low	Medium	Medium
Residential growth potential	High	Medium	Incremental	High	Medium	High
Office guidelines	C protect small office capacity	n/a	n/a	n/a	n/a	n/a
Strategic regeneration area	Yes	Yes	Yes	n/a	n/a	Yes

3.11 The analysis in the 2019 Update and this addendum confirm Barking Town Centre is the dominant town centre in the Borough, but the district centres also play an important role as a focal point in their respective areas. It is appropriate to differentiate the District Centres from the smaller Local Centres in the Borough. No chance to the proposed adopted hierarchy of centres is recommended.

3.12 Consistent with the NLPIP's suggested medium to low commercial growth potential, the floorspace capacity projections in this report suggest moderate levels of demand for retail and leisure development in Barking Town Centre and limited scope within the three existing District Centres. New facilities at Barking Riverside and Merrielands Crescent are included as commitments and allowance is made within the floorspace capacity projections for these developments. Barking Town Centre is expected to accommodate about 45% of the residual floorspace capacity over and above commitments. NLPIP Policy E9 suggests capacity for comparison goods retail should be brought forward in the main centres including Major Town Centres such as Barking Town Centre.

3.13 Draft Policy SP 5 supports the rejuvenation of Barking Town Centre and the shopping parade at Dagenham Heathway to enhance retail and residential, with linked improvements to the local public realm. Non-traditional retail uses will also be supported. This approach is in accordance with the regeneration objectives for these centres in the NLPIP and the revised floorspace projections in this addendum.

Policy DME 3: Vibrant, resilient, and characterful town centres

3.14 Linked to Policy SP5, Draft Policy DME 3 supports and reinforces the role and function of the Borough's hierarchy of designated town centres. This is consistent with NLPIP Policy SD8 and Annex 1.

Sequential approach

3.15 The sequential test in both the NPPF and NLPIP indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 86). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 87).

3.16 In accordance with the sequential approach, as set out in the NPPF and NLPIP (Policy SD7), this draft policy supports development proposals for main town centre uses, including community and cultural uses within the primary shopping area in designated town centres, followed by edge-of-centre sites. New retail uses outside the primary shopping area, but still within the town centre boundary, will be considered as edge-of-centre in planning policy terms and therefore subject to the impact and sequential tests. This approach is consistent with the NPPF glossary in Annex 2, which states edge-of-centre for retail proposes are locations that are well connected to, and up to 300 metres from the primary shopping area. For other main town centre uses, edge-of-centre will be located outside the town centre boundary but within 500 metres of a public transport interchange.

3.17 In order to facilitate this approach, the extent of town, district and neighbourhood centres will be illustrated on the Local Plan Policies Map. The boundaries will clearly relate to the application of the sequential and impact tests, which seek to direct retail and other key town centre uses to town centres and requires proposed retail development in edge, or out of town centre sites to be considered against the sequential approach. This approach is consistent with the NPPF and the NLPIP.

Impact threshold

3.18 The NPPF states that, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross. The Planning Policy Guidance (PPG) provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- the likely effects of development on any town centre strategy; and the impact on any other planned investment.

3.19 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre. Maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.

3.20 Draft Policy DME 3 indicates development proposals for retail and leisure development outside the designated town centres and exceeding 500 sq.m gross will be required to submit an impact assessment in accordance with the NPPF and NPPG. The NPPF minimum threshold of 2,500 sq.m gross for impact assessment continues to be inappropriate as a blanket threshold across the Borough, because this scale of development would represent a significant proportion of the overall retail projections for most centres in the Borough. The revised floorspace capacity projections in this Addendum are lower than the 2019 Update and the need for a lower impact threshold (500 sq.m gross) is reinforced.

New local shopping centres

3.21 Draft Policy DME 3 also refers to development proposals for new local shopping centres. New local centres must seek to meet the needs of local residents based on local evidence. The draft policy correctly indicates applicants will be required to present robust justification including an impact assessment.

3.22 The benefit of this proposed policy approach is that it allows the provision of new local facilities in areas that may be poorly served and/or within large mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

3.23 NLPIP Policy SD8 indicate local and neighbourhood centres should focus on providing convenient and attractive access by walking and cycling to local goods and services needed on a day-to-day basis. NLPIP Policy E9 suggests a policy framework is required to enhance local and neighbourhood shopping facilities and the identification of under-served areas to serve existing or new residential communities. The objectives of Draft Policy DME 3 are consistent with this NLPIP approach.

3.24 The Planning Policy Guidance (PPG) suggests some certain main town centre uses have "particular market and locational requirements that mean they may only be accommodated in specific locations", but robust justification must be provided. The need for a new local centre is example of where there is a particular market and locational requirement that cannot be served by an existing centre. The aims of draft Policy DME 3 are consistent with the PPG guidance.

3.25 Out-of-centre developments that include new local facilities should only be exempt from compliance with the sequential test where the proposed main town centre uses serve the local needs generated by the development or serve an area of deficiency, and where that need cannot be met by existing facilities within nearby centres. The onus is on the applicant to provide robust justification.

3.26 The footnote to draft Policy DME3, refers to the local needs index as a useful indicator of whether a local centre or important local parade is meeting some or all the needs of local residents. The updated local needs index plan with the two new district centres is shown Appendix 1.

Active ground floor frontages

3.27 Draft Policy DME 3 indicates development proposals in town centres will be required to deliver and/or maintain active ground floor frontages generating high footfall (proportionate to the scale and nature of the centre). This includes, but is not limited to, shops, markets, community, cultural and civic uses.

3.28 This approach is consistent with NLPIP Policy SD6, which also indicates active frontages should be secured in new town centre developments.

Policies DME 4, DME 5 and DME 6

3.29 These draft policies relate to controlling and promoting non-retail uses within designated centres and issues are interrelated. Draft Policy DME 4 seeks to prevent the over-concentration of hot food takeaways, betting shops, and pay day loan shops. Draft Policy DME 5 promotes visitor accommodation in appropriate town centre locations. Draft Policy DME 6 promotes the evening economy subject to compliance with Policy criteria.

3.30 As indicated in the 2019 Update, the revised NPPF provides limited guidance on the appropriate policy approach that should be adopted in relation to the mix and location of uses in town centres. However, the NPPF implies a more flexible approach should be considered based on local circumstances. Town centres should provide a range and mix of complementary uses. A balance between retail, entertainment and leisure activity helps town centres compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings. The 2019 Update recommended a review of the primary and secondary shopping frontage designations and policy approach. The appropriate approach should be considered on a centre by centre basis, as one approach is unlikely to be suitable for all centres.

3.31 The revised NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies are expected to clarify the range of uses permitted, as part of a positive strategy for the future of each centre. This approach has been endorsed in the NLPIP Policy SD6 (Town centres and high streets) which indicates the varied role of London’s high streets should be supported and enhanced. It promotes a diverse range of uses, including main town centre uses, night-time-economy, civic, community, social and residential uses. It encourages mixed use development, adaptation/diversification of town centres and redevelopment/change of use/intensification of surplus office space to other uses including housing.

3.32 The NLPIP Policy E9 refers to a successful and diverse retail sector and suggests development plans can seek to manage clusters of retail and associated uses having regard to their positive and negative impacts, including: town centre vitality, viability and diversity; sustainability and accessibility; place-making/local identify, community safety/security; and mental and physical health/wellbeing. Policy E9 restricts new A5 hot takeaway uses within 400 metres from schools and suggests Boroughs should carefully manage the over-concentration of hot food takeaways by the use of locally-defined thresholds.

3.33 The supporting text to NLPIP Policy E9 also refers to the over-concentration of hot food takeaways and other uses such as betting shops, pay-day loan stores and amusement centres, giving rise to concerns regarding the impact on mental and physical health and wellbeing, amenity, vitality, viability and diversity. This NLPIP supporting text suggests the proliferation and concentrate of these uses should be carefully managed by development plans. Draft Policy DME 4 is consistent with this approach.

3.34 The NLPIP (Policy SD6) also refers to the need to manage vibrant daytime, evening and night-time activities to enhance town centres, but this should have regard to the role of individual centres. Improvements to tourist infrastructure, attractions and hotels in town centres are also supported. NLPIP Policy E10 also seeks to maintain and enhance tourism and visitor accommodation. Draft Policies DME 5 and DME 6 are consistent with the objectives of NLPIP Policy SD6, and Policy E10.

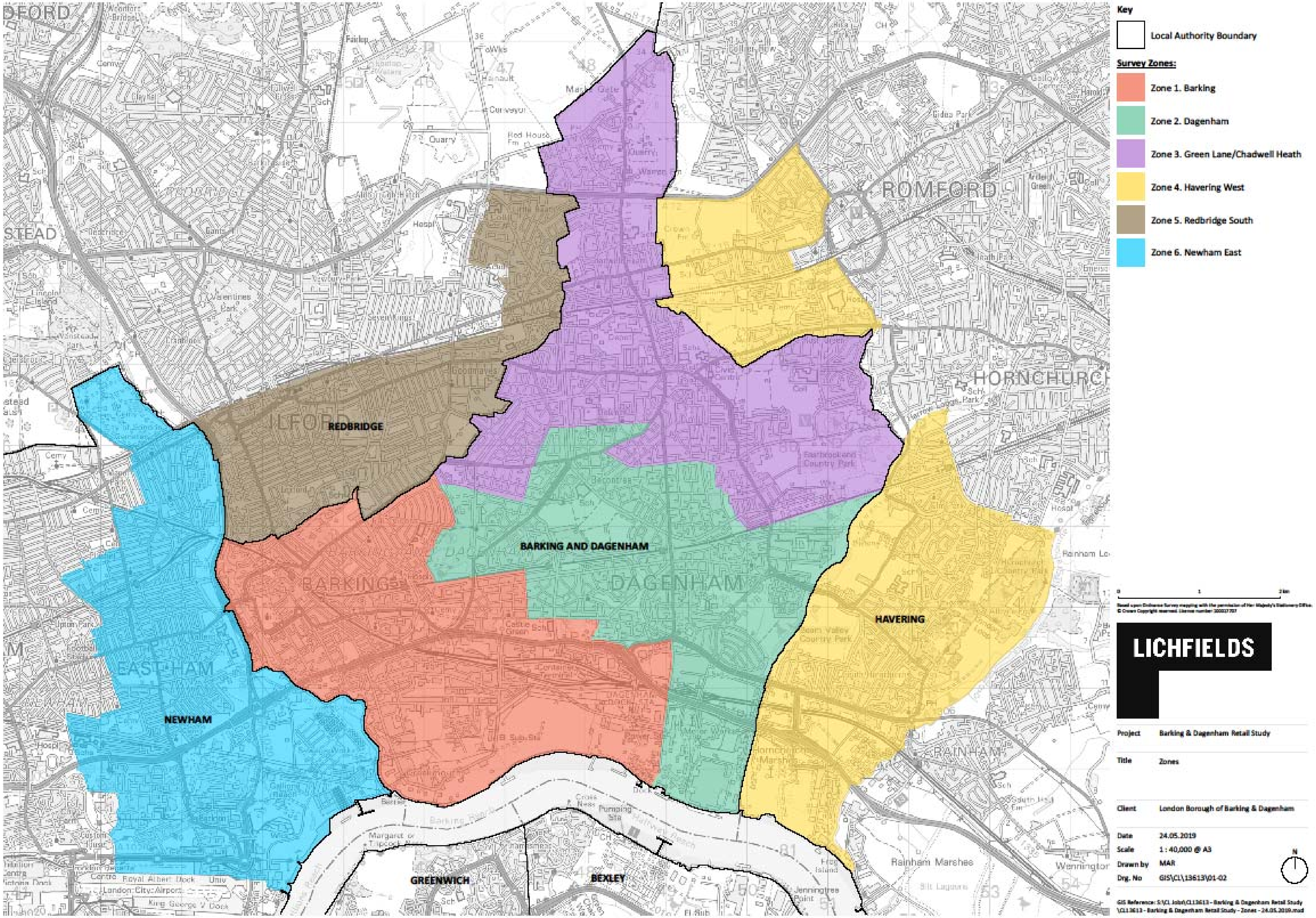
3.35 The importance of a balance between retail and other town centre activity has increased in recent years, as town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.

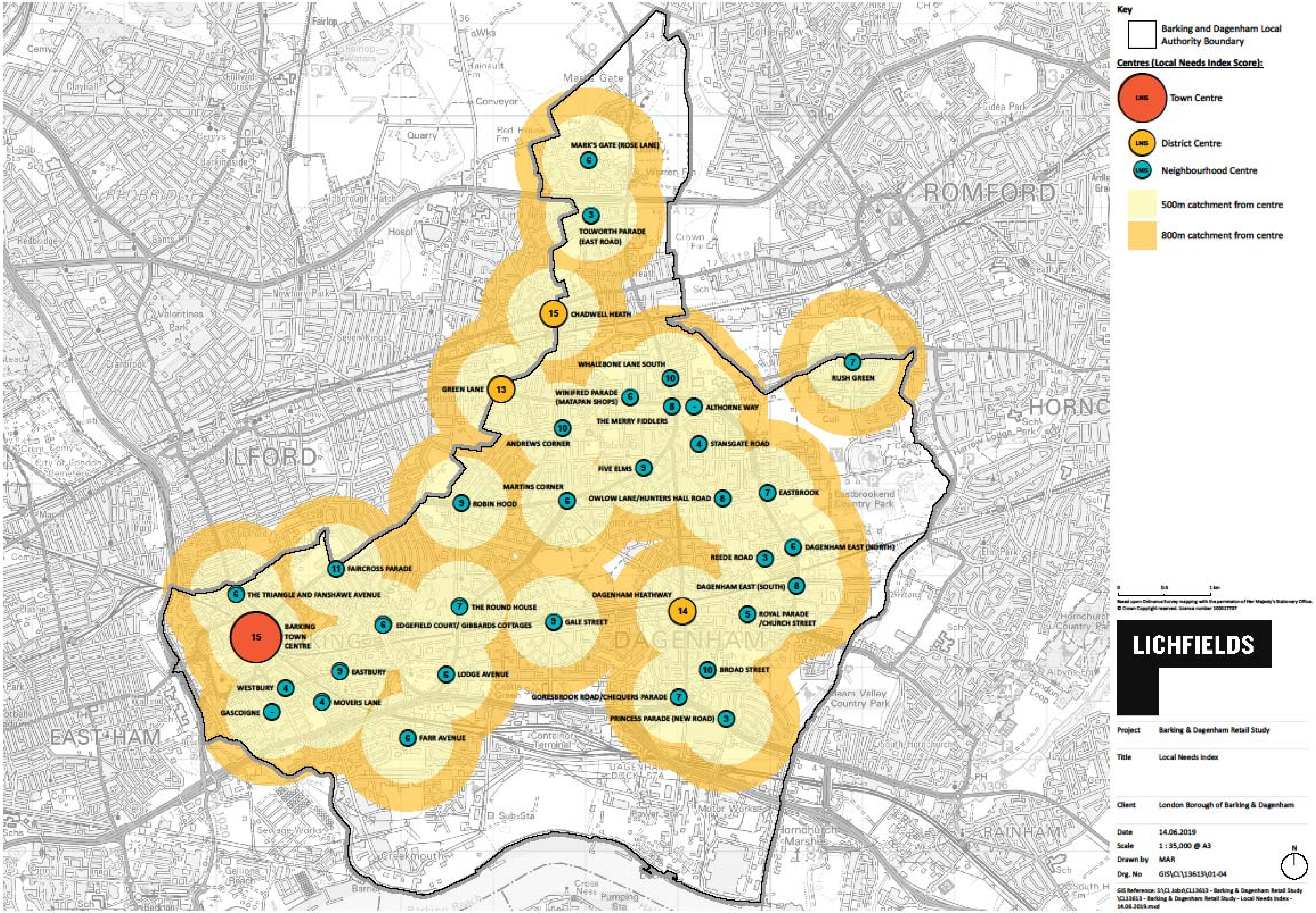
3.36 The 2019 Update suggested two broad policy approaches that can be adopted to control the appropriate mix of uses within town centres as follows:

- percentage thresholds restricting the amount of non-retail uses in designated frontages;
- criteria based policies that allow changes of use subject to specific requirements.

3.37 The 2019 Update indicated that both approaches are widely adopted across London and the South East and there is no right or wrong approach. Draft Policies DME 4, DME 5 and DME 6 effectively introduce a more flexible criteria based approach consistent with local circumstances. Criteria based policies are more flexible, allowing change of use applications to be assessed on their individual merits.

Appendix 1 Study area/Local Index plan


REDBRIDGE
BARKING AND DAGENHAM
HAVERING
NEWHAM
GREENWICH
BEXLEY
ILFORD
BARKING
DAGENHAM
EAST HAM
ROMFORD
HORNCHURCH
RAINHAM
Key
Local Authority Boundary
Survey Zones:
Zone 1. Barking
Zone 2. Dagenham
Zone 3. Green Lane/Chadwell Heath
Zone 4. Havering West
Zone 5. Redbridge South
Zone 6. Newham East
0
1
2 km
LICHFIELDS
Project Barking & Dagenham Retail Study
Title Zones
Client London Borough of Barking & Dagenham
Date 24.05.2019
Scale 1 : 40,000 @ A3
Drawn by MAR
Drg. No GIS\CL\13613\01-02
N


Key
Barking and Dagenham Local Authority Boundary
Centres (Local Needs Index Score):
Town Centre
District Centre
Neighbourhood Centre
500m catchment from centre
800m catchment from centre
6 MARK'S GATE (ROSE LANE)
3 TOLWORTH PARADE (EAST ROAD)
15 CHADWELL HEATH
13 GREEN LANE
10 WHALEBONE LANE SOUTH
6 WINIFRED PARADE (MATAPAN SHOPS)
8 THE MERRY FIDDLERS
- ALTHORNE WAY
10 ANDREWS CORNER
4 STANSGATE ROAD
5 FIVE ELMS
7 EASTBROOK
5 ROBIN HOOD
6 MARTINS CORNER
8 OWLOW LANE/HUNTERS HALL ROAD
7 RUSH GREEN
3 REEDE ROAD
6 DAGENHAM EAST (NORTH)
6 DAGENHAM EAST (SOUTH)
11 FAIRCROSS PARADE
6 THE TRIANGLE AND FANSHAWE AVENUE
7 THE ROUND HOUSE
6 EDGEFIELD COURT/ GIBBARDS COTTAGES
9 GALE STREET
14 DAGENHAM HEATHWAY
5 ROYAL PARADE /CHURCH STREET
15 BARKING TOWN CENTRE
9 EASTBURY
6 LODGE AVENUE
4 WESTBURY
4 MOVERS LANE
- GASCOIGNE
6 FARR AVENUE
10 BROAD STREET
7 GORESBROOK ROAD/CHEQUERS PARADE
3 PRINCESS PARADE (NEW ROAD)
ROMFORD
ILFORD
DAGENHAM
EAST HAM
HORNC
RAINHAM
0 0.5 1 km
LICHFIELDS
Project Barking & Dagenham Retail Study
Title Local Needs Index
Client London Borough of Barking & Dagenham
Date 14.06.2019
Scale 1 : 35,000 @ A3
Drawn by MAR
Drg. No GIS\CL\13613\01-04
N

Appendix 2 Convenience goods capacity

Table 1: Study Area Population

	2019	2024	2029	2034
Zone 1 - Barking	71,490	85,836	100,298	128,746
Zone 2 - Dagenham	69,162	71,238	78,995	79,975
Zone 3 - Green Lane/Chadwell Heath	74,205	72,263	74,205	76,948
Zone 4 - Havering West	48,299	56,899	62,624	64,706
Zone 5 - Redbridge South	82,749	92,275	95,592	99,206
Zone 6 - Newham East	99,076	97,594	109,765	117,844
Total	**444,981**	**476,105**	**521,479**	**567,425**

Sources:
GLA 2016 Round of Demographic Projections - SHLAA-based ward projections

Table 2: Convenience Goods Expenditure per person (£)

	2019	2024	2029	2034
Zone 1 - Barking	1,703	1,693	1,687	1,690
Zone 2 - Dagenham	1,920	1,909	1,902	1,906
Zone 3 - Green Lane/Chadwell Heath	1,890	1,879	1,873	1,876
Zone 4 - Havering West	1,959	1,948	1,941	1,945
Zone 5 - Redbridge South	1,615	1,606	1,600	1,603
Zone 6 - Newham East	1,510	1,502	1,496	1,499

Sources:
Experian 2017 local expenditure estimates and recommended forecasts (Retail Planner Briefing Note 17)
Data in 2017 prices *Excludes Special Forms of Trading*

Table 3: Total Convenience Goods Expenditure (£m)

	2019	2024	2029	2034
Zone 1 - Barking	121.75	145.32	169.20	217.58
Zone 2 - Dagenham	132.79	135.99	150.25	152.43
Zone 3 - Green Lane/Chadwell Heath	140.25	135.78	138.99	144.35
Zone 4 - Havering West	94.62	110.84	121.55	125.85
Zone 5 - Redbridge South	133.64	148.19	152.95	159.03
Zone 6 - Newham East	149.60	146.59	164.21	176.65
Total	**772.65**	**822.71**	**897.15**	**975.90**

Source: Tables 1 and 2

Table 4: Base Year 2013 Convenience Goods Market Shares (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Asda, Vicarage Field Shopping Centre, Barking	26.3%	1.1%	0.5%	0.4%	2.9%	1.7%	5.0%
Tesco Superstore, Highbridge Road, Barking	7.9%	0.1%	0.8%	0.0%	2.5%	8.2%	5.0%
Other stores, Barking	7.8%	0.9%	0.2%	0.2%	1.7%	0.3%	5.0%
Other Zone 1	17.1%	5.2%	1.6%	2.3%	3.2%	3.5%	5.0%
Barking Sub-Total	**59.1%**	**7.3%**	**3.1%**	**2.9%**	**10.3%**	**13.7%**	
Iceland/Lidl, Dagenham, Heathway	0.5%	9.2%	2.4%	0.0%	0.0%	0.0%	5.0%
Tesco Express, Dagenham Heathway	0.0%	4.2%	0.5%	0.0%	0.0%	0.4%	5.0%
Other Zone 2	2.0%	13.2%	8.8%	0.0%	2.4%	0.0%	5.0%
Asda, Merrielands Crescent, Dagenham	13.0%	33.6%	11.5%	7.8%	0.6%	0.2%	5.0%
Dagenham Sub-Total	**15.5%**	**60.2%**	**23.2%**	**7.8%**	**3.0%**	**0.6%**	
Sainsbury's, High Street, Chadwell Heath	0.0%	3.0%	6.5%	0.4%	9.9%	0.0%	5.0%
Tesco Express, Chadwell Heath	0.6%	0.3%	0.9%	0.0%	3.4%	0.2%	5.0%
Other Chadwell Heath	0.0%	0.0%	0.2%	0.0%	2.0%	0.0%	5.0%
Chadwell Heath Sub-Total	**0.6%**	**3.3%**	**7.6%**	**0.4%**	**15.3%**	**0.2%**	
Green Lane	0.4%	0.2%	3.2%	0.6%	5.6%	0.4%	5.0%
Morrisons, Becontree Heath	1.5%	4.5%	19.8%	1.0%	2.2%	0.0%	5.0%
Other Zone 3	0.3%	1.0%	9.0%	0.0%	0.2%	0.0%	5.0%
Green Lane Sub-Total	**2.2%**	**5.7%**	**32.0%**	**1.6%**	**8.0%**	**0.4%**	
LBBD Total	**77.4%**	**76.5%**	**65.9%**	**12.7%**	**36.6%**	**14.9%**	
Beckton	11.8%	2.1%	0.8%	0.0%	3.3%	35.3%	n/a
East Ham	0.3%	0.0%	0.0%	0.0%	0.4%	24.9%	n/a
Ilford	1.6%	0.7%	0.8%	0.4%	18.6%	7.8%	n/a
Romford	1.2%	8.4%	21.8%	12.4%	18.3%	0.2%	n/a
Hornchurch	1.0%	1.3%	3.1%	30.2%	0.3%	0.1%	n/a
Rainham	0.7%	7.1%	3.2%	32.7%	0.0%	0.0%	n/a
Lakeside	1.3%	0.5%	0.1%	0.4%	0.3%	0.2%	n/a
Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	n/a
Other Outside LBBD	4.7%	3.4%	4.3%	11.2%	22.2%	15.2%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013

Table 5: Adjusted Convenience Goods Market Shares 2019 (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	58.5%	7.2%	2.7%	2.9%	11.0%	14.0%	5.0%
Dagenham	14.8%	57.4%	20.7%	7.8%	3.0%	0.6%	5.0%
Chadwell Heath	0.6%	3.3%	6.8%	0.3%	13.6%	0.2%	5.0%
Green Lane	4.8%	9.7%	38.0%	1.8%	14.6%	0.4%	5.0%
LBBD Total	**78.7%**	**77.6%**	**68.2%**	**12.8%**	**42.2%**	**15.2%**	
Outside LBBD	21.3%	22.4%	31.8%	87.2%	57.8%	84.8%	
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013 with adjustments for completed development since 2013

Table 6: Current Convenience Goods Shopping Patterns 2019 (£m)

Area	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2019	**121.75**	**132.79**	**140.25**	**94.62**	**133.64**	**149.60**		**772.65**
Barking	71.22	9.56	3.79	2.74	14.70	20.94	6.47	**129.43**
Dagenham	18.02	76.22	29.03	7.38	4.01	0.90	7.13	**142.69**
Chadwell Heath	0.73	4.38	9.54	0.28	18.17	0.30	1.76	**35.17**
Green Lane	5.84	12.88	53.29	1.70	19.51	0.60	4.94	**98.77**
LBBD Total	**95.82**	**103.05**	**95.65**	**12.11**	**56.40**	**22.74**	**20.30**	**406.06**
Outside LBBD	25.93	29.75	44.60	82.51	77.24	126.86	n/a	**386.89**
Total	**121.75**	**132.79**	**140.25**	**94.62**	**133.64**	**149.60**	n/a	**792.95**

Source: Tables 3 and 5

Table 7: Adjusted Future Convenience Goods Market Shares 2024 onward (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	49.0%	7.0%	2.7%	2.9%	11.0%	14.0%	5.0%
Dagenham	11.2%	51.8%	20.7%	7.8%	3.0%	0.6%	5.0%
Chadwell Heath	0.6%	3.3%	6.8%	0.3%	13.6%	0.2%	5.0%
Green Lane	4.8%	9.7%	38.0%	1.8%	14.6%	0.4%	5.0%
Barking Riverside*	15.0%	7.3%	0.0%	0.0%	0.0%	0.0%	5.0%
LBBD Total	**80.6%**	**79.1%**	**68.2%**	**12.8%**	**42.2%**	**15.2%**	
Outside LBBD	19.4%	20.9%	31.8%	87.2%	57.8%	84.8%	
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013 with adjustments
** district/neighourhood centres up to 19,700 sq.m gross of Class A1 to A5 uses, including a large food store (2,500 to 8,000 sq.m).*

Table 8: Future Convenience Goods Shopping Patterns 2024 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2024	**145.32**	**135.99**	**135.78**	**110.84**	**148.19**	**146.59**		**822.71**
Barking	71.21	9.52	3.67	3.21	16.30	20.52	6.55	**130.98**
Dagenham	16.28	70.44	28.11	8.65	4.45	0.88	6.78	**135.58**
Chadwell Heath	0.87	4.49	9.23	0.33	20.15	0.29	1.86	**37.23**
Green Lane	6.98	13.19	51.60	2.00	21.64	0.59	5.05	**101.03**
Barking Riverside	21.80	9.93	0.00	0.00	0.00	0.00	1.67	**33.40**
LBBD Total	**117.13**	**107.57**	**92.60**	**14.19**	**62.54**	**22.28**	**21.91**	**438.22**
Outside LBBD	28.19	28.42	43.18	96.65	85.66	124.31	n/a	**406.41**
Total	**145.32**	**135.99**	**135.78**	**110.84**	**148.19**	**146.59**	n/a	**844.63**

Source: Tables 3 and 7

Table 9: Future Convenience Goods Shopping Patterns 2029 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2029	**169.20**	**150.25**	**138.99**	**121.55**	**152.95**	**164.21**		**897.15**
Barking	82.91	10.52	3.75	3.53	16.82	22.99	7.40	**147.91**
Dagenham	18.95	77.83	28.77	9.48	4.59	0.99	7.40	**148.00**
Chadwell Heath	1.02	4.96	9.45	0.36	20.80	0.33	1.94	**38.86**
Green Lane	8.12	14.57	52.81	2.19	22.33	0.66	5.30	**105.98**
Barking Riverside	25.38	10.97	0.00	0.00	0.00	0.00	1.91	**38.26**
LBBD Total	**136.38**	**118.85**	**94.79**	**15.56**	**64.54**	**24.96**	**23.95**	**479.03**
Outside LBBD	32.83	31.40	44.20	105.99	88.40	139.25	n/a	**442.07**
Total	**169.20**	**150.25**	**138.99**	**121.55**	**152.95**	**164.21**	n/a	**921.10**

Source: Tables 3 and 7

Table 10: Future Convenience Goods Shopping Patterns 2034 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2034	**217.58**	**152.43**	**144.35**	**125.85**	**159.03**	**176.65**		**975.90**
Barking	106.61	10.67	3.90	3.65	17.49	24.73	8.79	**175.85**
Dagenham	24.37	78.96	29.88	9.82	4.77	1.06	7.83	**156.69**
Chadwell Heath	1.31	5.03	9.82	0.38	21.63	0.35	2.03	**40.54**
Green Lane	10.44	14.79	54.85	2.27	23.22	0.71	5.59	**111.87**
Barking Riverside	32.64	11.13	0.00	0.00	0.00	0.00	2.30	**46.07**
LBBD Total	**175.37**	**120.57**	**98.45**	**16.11**	**67.11**	**26.85**	**26.55**	**531.01**
Outside LBBD	42.21	31.86	45.90	109.74	91.92	149.80	n/a	**471.43**
Total	**217.58**	**152.43**	**144.35**	**125.85**	**159.03**	**176.65**	n/a	**1,002.45**

Source: Tables 3 and 7

Table 11: Convenience Goods Floorspace and Benchmark Turnover 2019

	Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Barking					
B&M Bargains, Vicarage Field Shopping Centre	1,456	20%	291	£4,031	£1.17
Asda, Genoa Building, London Road	2,634	85%	2,239	£13,659	£30.58
Tesco Superstore, Highbridge Road, Barking	2,942	85%	2,501	£13,797	£34.50
Iceland, 34/42 East Street, Barking	521	98%	511	£6,859	£3.50
Lidl, 62-82 Ripple Road, Barking	1,197	80%	958	£10,103	£9.67
Tesco Ripple Road Express, Barking	278	95%	264	£13,797	£3.64
Tesco Ripple Road (Esso) Express, Barking	116	95%	110	£13,797	£1.52
Other Barking Town Centre shops	3,941	100%	3,941	£6,000	£23.65
Other Zone 1	1,841	100%	1,841	£6,000	£11.05
Barking Total	**14,926**		**12,655**		**£119.29**
Dagenham					
Asda, Merrielands Crescent, Dagenham	7,140	65%	4,641	£13,659	£63.39
Aldi, Merrielands Retail Park	782	85%	665	£10,827	£7.20
B&M Bargains, Merrielands Retail Park	2,815	20%	563	£4,031	£2.27
Co-op, Faircross Parade	174	95%	165	£10,824	£1.79
Lidl, Heathway, Dagenham Heathway	716	85%	609	£10,103	£6.15
Iceland, Heathway, Dagenham Heathway	428	98%	419	£6,859	£2.88
Tesco Express, Dagenham Heathway	273	95%	259	£13,797	£3.58
Other Dagenham Heathway	1,022	100%	1,022	£6,000	£6.13
Tesco Express, Shafter Road	247	95%	235	£13,797	£3.24
Co-op, Porters Avenue	200	95%	190	£10,824	£2.06
Co-op, Gale Street	122	95%	116	£10,824	£1.25
Co-op, Wood Lane	342	95%	325	£10,824	£3.52
Other Zone 2	1,708	100%	1,708	£6,000	£10.25
Dagenham total	**15,969**		**10,917**		**£113.70**
Chadwell Heath					
Sainsbury's, High Road, Chadwell Heath	2,621	85%	2,228	£11,691	£26.05
Tesco Express, Chadwell Heath	255	95%	242	£13,797	£3.34
Other Chadwell Heath	1,463	100%	1,463	£6,000	£8.78
Chadwell Heath Total	**4,339**		**3,933**		**£38.17**
Green Lane					
Tesco Express, Green Lane	291	95%	276	£13,797	£3.81
Other Green Lane	2,095	100%	2,095	£6,000	£12.57
Morrisons, Wood Lane, Becontree Heath	2,546	85%	2,164	£10,476	£22.67
Asda, Whalebone Lane	2,851	85%	2,423	£13,659	£33.10
B&M Bargains, Whalebone Lane	1,069	20%	214	£4,031	£0.86
Iceland, Whalebone Lane South	616	98%	604	£6,859	£4.14
Co-op, Becontree Avenue	84	95%	80	£10,824	£0.86
Co-op, Rose Lane	153	95%	145	£10,824	£1.57
Tesco Express, Rowallen Parade	249	95%	237	£13,797	£3.26
Lidl, Longbridge Road	1,046	80%	837	£10,103	£8.45
Tesco Express, Oxlow Lane	225	95%	214	£13,797	£2.95
McColls, Oxlow Lane	281	95%	267	£6,418	£1.71
Co-op, Dagenham Road	384	95%	365	£10,824	£3.95
Other Zone 3	3,283	100%	3,283	£6,000	£19.70
Green Lane Total	**15,173**		**13,203**		**£119.62**
LBBD TOTAL	**50,407**		**40,709**		**£390.77**
Commitments					
Barking Riverside	3,960	75%	2,970	£12,000	£35.64
Vicarage Fields Redevelopment *net increase	700	85%	595	£12,000	£7.14
Abbey Road Retail Park Redevelopment	805	95%	765	£12,000	£9.18
Gascoigne Estate West Redevelopment	88	95%	84	£12,000	£1.00
Fresh Wharf Estate Redevelopment	238	95%	226	£12,000	£2.71
Gascoigne Estate East Redevelopment	473	90%	426	£12,000	£5.11
Merrielands Development Site	227	95%	216	£12,000	£2.59
Beam Park Development Site	835	85%	710	£12,000	£8.52
Coopers Arms Public House, Chadwell Heath	275	95%	261	£12,000	£3.14
Total	**7,601**		**6,252**		**£75.02**

Source: ORC StorePoint food store data (2019), Global Data company average sales densities (2018) and Goad Plan data

Table 12: Summary of Convenience Goods Expenditure 2019 to 2034

	2019	2024	2029	2034
Available Expenditure in LBBD (£m)				
Barking	129.43	130.98	147.91	175.85
Dagenham	142.69	135.58	148.00	156.69
Chadwell Heath	35.17	37.23	38.86	40.54
Green Lane	98.77	101.03	105.98	111.87
Barking Riverside	n/a	33.40	38.26	46.07
Total	**406.06**	**438.22**	**479.03**	**531.01**
Benchmark turnover existing facilities (£m)				
Barking	119.29	120.25	120.25	120.25
Dagenham	113.70	114.61	114.61	114.61
Chadwell Heath	38.17	38.47	38.47	38.47
Green Lane	119.62	120.58	120.58	120.58
Barking Riverside	n/a	n/a	n/a	n/a
Total	**390.77**	**393.91**	**393.91**	**393.91**
Turnover of Commitments (£m)				
Barking	n/a	25.34	25.34	25.34
Dagenham	n/a	11.19	11.19	11.19
Chadwell Heath	n/a	3.16	3.16	3.16
Green Lane	n/a	0.00	0.00	0.00
Barking Riverside	n/a	35.93	35.93	35.93
Total	**n/a**	**75.62**	**75.62**	**75.62**
Surplus/Deficit Expenditure (£m)				
Barking	10.14	-14.61	2.32	30.26
Dagenham	29.00	9.78	22.20	30.89
Chadwell Heath	-3.00	-4.40	-2.77	-1.09
Green Lane	-20.85	-19.55	-14.60	-8.71
Barking Riverside	n/a	-2.53	2.34	10.14
Total	**15.29**	**-31.31**	**9.50**	**61.48**

Source: Tables 6 to 11

Table 13: Convenience Goods Floorspace Expenditure Capacity 2019 to 2034

	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,096	£12,096	£12,096
Floorspace Requirement (sq.m net)				
Barking	n/a	-1,208	192	2,502
Dagenham	n/a	808	1,836	2,554
Chadwell Heath	n/a	-364	-229	-91
Green Lane	n/a	-1,616	-1,207	-720
Barking Riverside	n/a	-209	193	838
Total	**n/a**	**-2,588**	**785**	**5,083**
Floorspace Requirement (sq.m gross)				
Barking	n/a	-1,725	274	3,574
Dagenham	n/a	1,155	2,622	3,648
Chadwell Heath	n/a	-519	-327	-129
Green Lane	n/a	-2,309	-1,724	-1,029
Barking Riverside	n/a	-299	276	1,198
Total	**n/a**	**-3,698**	**1,122**	**7,261**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population

	2019	2024	2029	2034
Zone 1 - Barking	71,490	85,836	100,298	128,746
Zone 2 - Dagenham	69,162	71,238	78,995	79,975
Zone 3 - Green Lane/Chadwell Heath	74,205	72,263	74,205	76,948
Zone 4 - Havering West	48,299	56,899	62,624	64,706
Zone 5 - Redbridge South	82,749	92,275	95,592	99,206
Zone 6 - Newham East	99,076	97,594	109,765	117,844
Total	**444,981**	**476,105**	**521,479**	**567,425**

Sources:
GLA 2016 Round of Demographic Projections - SHLAA-based ward projections

Table 2: Comparison Goods Expenditure per person (£)

	2019	2024	2029	2034
Zone 1 - Barking	2,241	2,501	2,815	3,207
Zone 2 - Dagenham	2,309	2,576	2,899	3,303
Zone 3 - Green Lane/Chadwell Heath	2,476	2,763	3,109	3,543
Zone 4 - Havering West	3,025	3,375	3,798	4,328
Zone 5 - Redbridge South	2,174	2,426	2,730	3,111
Zone 6 - Newham East	1,935	2,159	2,430	2,769

Sources:
Experian Local Expenditure 2017 (2017 prices)
Experian Retail Planner Briefing Note 17 (February 2020)
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2019	2024	2029	2034
Zone 1 - Barking	160.21	214.68	282.34	412.89
Zone 2 - Dagenham	159.70	183.51	229.01	264.16
Zone 3 - Green Lane/Chadwell Heath	183.73	199.66	230.70	272.63
Zone 4 - Havering West	146.10	192.03	237.85	280.05
Zone 5 - Redbridge South	179.90	223.86	260.97	308.91
Zone 6 - Newham East	191.71	210.71	266.73	326.37
Total	**1,021.35**	**1,224.45**	**1,507.59**	**1,865.00**

Source: Tables 1 and 2

Table 4: Base Year Comparison Goods Market Shares 2013 (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking (incl. Abbey Retail Park)	23.2%	3.8%	1.7%	0.5%	4.1%	5.0%	10.0%
Dagenham Heathway (incl. Merrielands Retail Park)	5.4%	25.9%	8.2%	3.1%	1.1%	0.3%	10.0%
Chadwell Heath	0.5%	2.0%	4.7%	0.1%	7.0%	0.3%	5.0%
Green Lane	0.3%	0.9%	1.9%	0.0%	0.3%	0.1%	5.0%
LBBD Total	**29.4%**	**32.6%**	**16.5%**	**3.7%**	**12.5%**	**5.7%**	
Central London	3.4%	1.2%	3.0%	2.7%	2.6%	6.9%	n/a
Westfield, Stratford	4.0%	1.4%	1.6%	0.2%	5.9%	11.1%	n/a
Lakeside	18.4%	19.6%	17.5%	32.4%	7.6%	6.8%	n/a
Bluewater	1.1%	0.3%	1.3%	2.1%	2.3%	0.7%	n/a
East Ham	1.4%	0.5%	0.3%	0.0%	0.2%	18.1%	n/a
Romford	12.2%	29.6%	46.3%	38.4%	20.8%	4.7%	n/a
Ilford	8.2%	2.9%	4.2%	0.0%	32.4%	11.5%	n/a
Beckton	18.5%	5.2%	3.2%	0.6%	7.2%	29.2%	n/a
Rainham	0.3%	1.8%	0.7%	6.4%	0.0%	0.2%	n/a
Hornchurch	0.6%	1.6%	1.2%	8.1%	0.2%	0.0%	n/a
Other Outside LBBD	2.5%	3.3%	4.2%	5.4%	8.3%	5.1%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013

Table 5: Current 2019 Comparison Goods Market Shares (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking (Zone 1)	23.0%	3.6%	1.6%	0.5%	4.0%	5.0%	10.0%
Dagenham Heathway (Zone 2)	5.5%	25.7%	8.1%	3.1%	1.1%	0.3%	10.0%
Chadwell Heath	0.5%	1.7%	3.9%	0.1%	6.2%	0.2%	5.0%
Green Lane	0.3%	1.6%	3.4%	0.0%	2.2%	0.2%	5.0%
LBBD Total	**29.3%**	**32.6%**	**17.0%**	**3.7%**	**13.5%**	**5.7%**	
Outside LBBD	70.7%	67.4%	83.0%	96.3%	86.5%	94.3%	n/a n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013 with adjustments

Table 6: Current 2019 Comparison Goods Expenditure Patterns (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2019	**160.21**	**159.70**	**183.73**	**146.10**	**179.90**	**191.71**		**1021.35**
Barking	36.85	5.75	2.94	0.73	7.20	9.59	7.01	**70.05**
Dagenham Heathway	8.81	41.04	14.88	4.53	1.98	0.58	7.98	**79.80**
Chadwell Heath	0.80	2.71	7.17	0.15	11.15	0.38	1.18	**23.54**
Green Lane	0.48	2.56	6.25	0.00	3.96	0.38	0.72	**14.34**
LBBD Total	**46.94**	**52.06**	**31.23**	**5.41**	**24.29**	**10.93**	**16.88**	**187.74**
Outside LBBD	113.27	107.63	152.50	140.70	155.61	180.78	n/a	**850.49**
Total	**160.21**	**159.70**	**183.73**	**146.10**	**179.90**	**191.71**		**1,038.23**

Source: Tables 3 and 5

Table 7 Future Comparison Goods Market Shares (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	20.4%	3.5%	1.6%	0.5%	4.0%	5.0%	10.0%
Dagenham Heathway	4.7%	24.7%	8.1%	3.1%	1.1%	0.3%	10.0%
Chadwell Heath	0.5%	1.7%	3.9%	0.1%	6.2%	0.2%	5.0%
Green Lane	0.3%	1.6%	3.4%	0.0%	2.2%	0.2%	5.0%
Barking Riverside	8.0%	4.0%	0.0%	0.0%	0.0%	0.0%	5.0%
LBBD Total	**33.9%**	**35.5%**	**17.0%**	**3.7%**	**13.5%**	**5.7%**	
Outside LBBD	66.1%	64.5%	83.0%	96.3%	86.5%	94.3%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013 with adjustments

Table 8: Future Comparison Goods Expenditure Patterns 2024 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2024	**214.68**	**183.51**	**199.66**	**192.03**	**223.86**	**210.71**		**1224.45**
Barking	43.79	6.42	3.19	0.96	8.95	10.54	8.21	**82.07**
Dagenham Heathway	10.09	45.33	16.17	5.95	2.46	0.63	8.96	**89.60**
Chadwell Heath	1.07	3.12	7.79	0.19	13.88	0.42	1.39	**27.87**
Green Lane	0.64	2.94	6.79	0.00	4.92	0.42	0.83	**16.54**
Barking Riverside	17.17	7.34	0.00	0.00	0.00	0.00	1.29	**25.80**
LBBD Total	**72.78**	**65.15**	**33.94**	**7.11**	**30.22**	**12.01**	**20.68**	**241.88**
Outside LBBD	141.90	118.36	165.72	184.93	193.64	198.70	n/a	**1,003.25**
Total	**214.68**	**183.51**	**199.66**	**192.03**	**223.86**	**210.71**		**1,245.12**

Source: Tables 3 and 7

Table 9: Future Comparison Goods Expenditure Patterns 2029 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2029	**282.34**	**229.01**	**230.70**	**237.85**	**260.97**	**266.73**		**1507.59**
Barking	57.60	8.02	3.69	1.19	10.44	13.34	10.47	**104.74**
Dagenham Heathway	13.27	56.56	18.69	7.37	2.87	0.80	11.06	**110.63**
Chadwell Heath	1.41	3.89	9.00	0.24	16.18	0.53	1.64	**32.90**
Green Lane	0.85	3.66	7.84	0.00	5.74	0.53	0.98	**19.61**
Barking Riverside	22.59	9.16	0.00	0.00	0.00	0.00	1.67	**33.42**
LBBD Total	**95.71**	**81.30**	**39.22**	**8.80**	**35.23**	**15.20**	**25.83**	**301.30**
Outside LBBD	186.63	147.71	191.48	229.05	225.74	251.53	n/a	**1,232.13**
Total	**282.34**	**229.01**	**230.70**	**237.85**	**260.97**	**266.73**		**1,533.42**

Source: Tables 3 and 7

Table 10: Future Comparison Goods Expenditure Patterns 2034 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2034	**412.89**	**264.16**	**272.63**	**280.05**	**308.91**	**326.37**		**1865.00**
Barking	84.23	9.25	4.36	1.40	12.36	16.32	14.21	**142.12**
Dagenham Heathway	19.41	65.25	22.08	8.68	3.40	0.98	13.31	**133.10**
Chadwell Heath	2.06	4.49	10.63	0.28	19.15	0.65	1.96	**39.23**
Green Lane	1.24	4.23	9.27	0.00	6.80	0.65	1.17	**23.35**
Barking Riverside	33.03	10.57	0.00	0.00	0.00	0.00	2.29	**45.89**
LBBD Total	**139.97**	**93.78**	**46.35**	**10.36**	**41.70**	**18.60**	**32.95**	**383.71**
Outside LBBD	272.92	170.38	226.28	269.69	267.21	307.76	n/a	**1,514.24**
Total	**412.89**	**264.16**	**272.63**	**280.05**	**308.91**	**326.37**		**1,897.94**

Source: Tables 3 and 7

Table 11 Comparison Goods Floorspace 2019

	Comparison Floorspace (sq.m gross)	Comparison Sales Floorspace (sq.m net)
Barking		
Barking Town Centre comparison shops	20,710	14,497
Comparison floorspace in food stores	n/a	1,106
Wickes, Hertford Road	5,300	4,240
Barking Total	**20,710**	**19,843**
Merrielands Retail Park		
Aldi	n/a	117
Argos	1,470	340
B&M Bargains	3,519	2,815
Halfords	925	740
TK Maxx	935	748
Pound Stretcher	542	434
Pets at Home	538	430
Asda	n/a	2,499
Merrielands Retail Park Total	**7,929**	**8,123**
Dagenham Heathway		
Dagenham Heathway Centre comparison shops	6,370	4,459
Comparison floorspace in food stores (Zone 2)	n/a	184
Dagenham Heathway Total	**6,370**	**4,643**
Chadwell Heath		
Chadwell Heath Centre comparison shops	4,080	2,856
Green Lane		
Green Lane Centre comparison shops	4,570	3,199
Comparison floorspace in food stores (Zone 3)	n/a	2,376
Green Lane Total	**4,570**	**5,575**
LBBD TOTAL	**39,579**	**38,184**
Commitments		
Barking Riverside	6,500	4,840
Vicarage Fields Redevelopment *net increase	1,750	1,313
Abbey Road Retail Park Redevelopment	804	603
Gascoigne Estate West Redevelopment	88	66
Former Abbey Leisure Centre Redevelopment	158	119
Fresh Wharf Estate Redevelopment	238	179
Gascoigne Estate East Redevelopment	463	347
Merrielands Development Site	908	681
Beam Park Development Site	835	626
Coopers Arms Public House, Chadwell Heath	275	206
Total	**12,019**	**8,979**

Source: Global Sales Data, VOA, Experian Goad and LBBD

Table 12 Summary of Comparison Goods Expendiutre 2019 to 2034

	2019	2024	2029	2034
Available Expenditure in LBBD (£m)				
Barking	70.05	82.07	104.74	142.12
Dagenham	79.80	89.60	110.63	133.10
Chadwell Heath	23.54	27.87	32.90	39.23
Green Lane	14.34	16.54	19.61	23.35
Barking Riverside	n/a	25.80	33.42	45.89
Total	**187.74**	**241.88**	**301.30**	**383.71**
Turnover of Existing Facilities (£m)				
Barking	70.05	82.64	95.34	108.92
Dagenham	79.80	94.14	108.60	124.07
Chadwell Heath	23.54	27.77	32.04	36.60
Green Lane	14.34	16.92	19.52	22.30
Barking Riverside	n/a	n/a	n/a	n/a
Total	**187.74**	**221.46**	**255.49**	**291.90**
Turnover of Commitments (£m)				
Barking	n/a	15.49	17.87	20.41
Dagenham	n/a	7.71	8.90	10.16
Chadwell Heath	n/a	1.22	1.40	1.60
Green Lane	n/a	0.00	0.00	0.00
Barking Riverside	n/a	28.55	32.93	37.63
Total	**n/a**	**52.96**	**61.10**	**69.81**
Surplus/Defecit Expenditure (£m)				
Barking	n/a	-16.06	-8.46	12.79
Dagenham	n/a	-12.25	-6.87	-1.13
Chadwell Heath	n/a	-1.12	-0.54	1.03
Green Lane	n/a	-0.38	0.09	1.05
Barking Riverside	n/a	-2.74	0.48	8.27
Total	**n/a**	**-32.55**	**-15.29**	**22.00**

Sources: Tables 6 to 9

Table 13 Comparison Goods Floorspace Capacity 2019 to 2034

	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,898	£6,805	£7,774
Floorspace Requirement (sq.m net)				
Barking	n/a	-2,723	-1,244	1,645
Dagenham	n/a	-2,077	-1,009	-145
Chadwell Heath	n/a	-190	-80	132
Green Lane	n/a	-64	14	135
Barking Riverside	n/a	-465	71	1,063
Total	**n/a**	**-5,519**	**-2,247**	**2,831**
Floorspace Requirement (sq.m gross)				
Barking	n/a	-3,630	-1,658	2,193
Dagenham	n/a	-2,769	-1,345	-194
Chadwell Heath	n/a	-254	-106	176
Green Lane	n/a	-85	18	181
Barking Riverside	n/a	-620	95	1,418
Total	**n/a**	**-7,358**	**-2,997**	**3,774**

Appendix 4 Food and Beverage Capacity

Table 1 Study Area Population

	2019	2024	2029	2034
Zone 1 - Barking	71,490	85,836	100,298	128,746
Zone 2 - Dagenham	69,162	71,238	78,995	79,975
Zone 3 - Green Lane/Chadwell Heath	74,205	72,263	74,205	76,948
Zone 4 - Havering West	48,299	56,899	62,624	64,706
Zone 5 - Redbridge South	82,749	92,275	95,592	99,296
Zone 6 - Newham East	99,076	97,594	109,765	117,864
Total	**444,981**	**476,105**	**521,479**	**567,535**

Sources:
GLA 2016 Round of Demographic Projections - SHLAA-based ward projections

Table 2 Food and Beverage Expenditure per person (£)

	2019	2024	2029	2034
Zone 1 - Barking	809	854	904	955
Zone 2 - Dagenham	817	863	914	965
Zone 3 - Green Lane/Chadwell Heath	854	902	954	1,008
Zone 4 - Havering West	1,053	1,112	1,177	1,243
Zone 5 - Redbridge South	762	804	851	899
Zone 6 - Newham East	709	748	792	837

Sources:
Experian Local Expenditure 2017 (2017 prices) *Experian Retail Planner Briefing Note 17 (February 2020)*

Table 3 Total Food and Beverage Expenditure (£m)

	2019	2024	2029	2034
Zone 1 - Barking	57.84	73.30	90.67	122.95
Zone 2 - Dagenham	56.51	61.48	72.20	77.18
Zone 3 - Green Lane/Chadwell Heath	63.37	65.18	70.79	77.56
Zone 4 - Havering West	50.86	63.27	73.71	80.43
Zone 5 - Redbridge South	63.05	74.19	81.35	89.27
Zone 6 - Newham East	70.24	73.00	86.93	98.65
Total	**361.87**	**410.42**	**475.65**	**546.04**

Source: Tables 1 and 2

Table 4 Base year 2013 Food and Drink Market Shares (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	21.9%	1.3%	0.6%	0.0%	4.2%	5.0%	5.0%
Dagenham	7.9%	35.7%	13.5%	1.7%	1.8%	0.4%	5.0%
Chadwell Heath/Green Lane	5.3%	7.4%	14.8%	0.0%	13.4%	0.7%	5.0%
LBBD Total	**35.1%**	**44.4%**	**28.9%**	**1.7%**	**19.4%**	**6.1%**	
Outside LBBD	64.9%	55.6%	71.1%	98.3%	80.6%	93.9%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013

Table 5 Current Food and Beverage Expenditure Patterns 2019 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow	Total
Expenditure 2019	**57.84**	**56.51**	**63.37**	**50.86**	**63.05**	**70.24**		**361.87**
Barking	12.67	0.73	0.38	0.00	2.65	3.51	1.05	**20.99**
Dagenham	4.57	20.17	8.56	0.86	1.13	0.28	1.87	**37.45**
Chadwell Heath/Green Lane	3.07	4.18	9.38	0.00	8.45	0.49	1.35	**26.91**
LBBD Total	**20.30**	**25.09**	**18.31**	**0.86**	**12.23**	**4.28**	**4.27**	**85.35**
Outside LBBD	37.54	31.42	45.06	49.99	50.82	65.96	n/a	**280.79**
Total	**57.84**	**56.51**	**63.37**	**50.86**	**63.05**	**70.24**		**366.14**

Source: Tables 3 and 4

Table 6 Future Food and Beverage Market Shares (%)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	19.6%	1.7%	0.7%	0.0%	4.4%	5.0%	5.0%
Dagenham	6.1%	30.2%	13.4%	1.7%	1.8%	0.4%	5.0%
Chadwell Heath/Green Lane	4.2%	6.7%	14.5%	0.0%	13.2%	0.7%	5.0%
Barking Riverside	12.0%	10.0%	0.3%	0.0%	0.0%	0.0%	5.0%
LBBD Total	**41.9%**	**48.6%**	**28.9%**	**1.7%**	**19.4%**	**6.1%**	
Outside LBBD	58.1%	51.4%	71.1%	98.3%	80.6%	93.9%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, October 2013 with adjustments for commitments

Table 7 Future Food and Beverage Expenditure Patterns 2024 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow	Total
Expenditure 2024	**73.30**	**61.48**	**65.18**	**63.27**	**74.19**	**73.00**		**410.42**
Barking	14.37	1.05	0.46	0.00	3.26	3.65	1.20	**23.98**
Dagenham	4.47	18.57	8.73	1.08	1.34	0.29	1.81	**36.29**
Chadwell Heath/Green Lane	3.08	4.12	9.45	0.00	9.79	0.51	1.42	**28.37**
Barking Riverside	8.80	6.15	0.20	0.00	0.00	0.00	0.80	**15.94**
LBBD Total	**30.71**	**29.88**	**18.84**	**1.08**	**14.39**	**4.45**	**5.23**	**104.58**
Outside LBBD	42.59	31.60	46.34	62.20	59.80	68.55	n/a	**311.07**
Total	**73.30**	**61.48**	**65.18**	**63.27**	**74.19**	**73.00**		**415.65**

Source: Tables 3 and 6

Table 8 Future Food and Beverage Expenditure Patterns 2029 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow	Total
Expenditure 2029	**90.67**	**72.20**	**70.79**	**73.71**	**81.35**	**86.93**		**475.65**
Barking	17.77	1.23	0.50	0.00	3.58	4.35	1.44	**28.86**
Dagenham	5.53	21.80	9.49	1.25	1.46	0.35	2.10	**41.99**
Chadwell Heath/Green Lane	3.81	4.84	10.26	0.00	10.74	0.61	1.59	**31.85**
Barking Riverside	10.88	7.22	0.21	0.00	0.00	0.00	0.96	**19.28**
LBBD Total	**37.99**	**35.09**	**20.46**	**1.25**	**15.78**	**5.30**	**6.10**	**121.98**
Outside LBBD	52.68	37.11	50.33	72.46	65.57	81.63	n/a	**359.78**
Total	**90.67**	**72.20**	**70.79**	**73.71**	**81.35**	**86.93**		**481.75**

Source: Tables 3 and 6

Table 9 Future Food and Beverage Expenditure Patterns 2034 (£m)

	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Ln/ Chadwell H.	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow	Total
Expenditure 2034	**122.95**	**77.18**	**77.56**	**80.43**	**89.27**	**98.65**		**546.04**
Barking	24.10	1.31	0.54	0.00	3.93	4.93	1.83	**36.65**
Dagenham	7.50	23.31	10.39	1.37	1.61	0.39	2.35	**46.92**
Chadwell Heath/Green Lane	5.16	5.17	11.25	0.00	11.78	0.69	1.79	**35.85**
Barking Riverside	14.75	7.72	0.23	0.00	0.00	0.00	1.19	**23.90**
LBBD Total	**51.52**	**37.51**	**22.42**	**1.37**	**17.32**	**6.02**	**7.17**	**143.31**
Outside LBBD	71.44	39.67	55.15	79.06	71.95	92.63	n/a	**409.90**
Total	**122.95**	**77.18**	**77.56**	**80.43**	**89.27**	**98.65**		**553.21**

Source: Tables 3 and 6

Table 10 Food and Beverage Outlets in Barking and Dagenham Borough 2019

	Class A3	Class A4	Class A5	Total
Barking Town Centre	31	6	16	53
Dagenham Heathway	2	1	9	12
Chadwell Heath	11	1	11	23
Green Lane	10	0	16	26
Other LBBD	54	8	98	160
LBBD TOTAL	**108**	**16**	**150**	**274**

Table 11 Food and Beverage Commitments

	Food and Beverage Floorspace (sq.m gross)	Turnover (per sq.m)	Total Turnover (£m)
Barking Riverside	3,900	£5,000	£19.50
Vicarage Fields Redevelopment *net increase	1,050	£5,000	£5.25
Abbey Road Retail Park Redevelopment	402	£5,000	£2.01
Gascoigne Estate West Redevelopment	70	£5,000	£0.35
Fresh Wharf Estate Redevelopment	190	£5,000	£0.95
Gascoigne Estate East Redevelopment	370	£5,000	£1.85
Merrielands Development Site	300	£5,000	£1.50
Coopers Arms Public House, Chadwell Heath	137	£5,000	£0.69
Total	**6,419**		**£32.10**

Table 12 Food and Beverage Capacity Assessment 2019 to 2034

	2019	2024	2029	2034
Available Expenditure in LBBD (£m)				
Barking	20.99	23.98	28.86	36.65
Dagenham	37.45	36.29	41.99	46.92
Chadwell Heath/Green Lane	26.91	28.37	31.85	35.85
Barking Riverside	n/a	15.94	19.28	23.90
Total	**85.35**	**104.58**	**121.98**	**143.31**
Turnover of existing facilities (£m)				
Barking	20.99	22.06	23.19	24.37
Dagenham	37.45	39.36	41.37	43.48
Chadwell Heath/Green Lane	26.91	28.29	29.73	31.24
Barking Riverside	n/a	n/a	n/a	n/a
Total	**85.35**	**89.71**	**94.28**	**99.09**
Turnover of commitments (£m)				
Barking	n/a	10.41	10.94	11.50
Dagenham	n/a	1.50	1.58	1.66
Chadwell Heath/Green Lane	n/a	0.69	0.72	0.76
Barking Riverside	n/a	19.50	20.49	21.54
Total	n/a	**32.10**	**33.73**	**35.45**

Source: Tables 5 to 11

Table 13 Food and Beverage Capacity Assessment 2019 to 2034

Centre	2019	2024	2029	2034
Surplus/Deficit Expenditure (£m)				
Barking	0.00	-8.49	-5.26	0.78
Dagenham	0.00	-3.07	0.62	3.44
Chadwell Heath/Green Lane	0.00	-0.60	1.40	3.85
Barking Riverside	0.00	-3.56	-1.22	2.36
Total				
Turnover Density New Floorspace (£ per sq.m)	**£5,000**	**£5,000**	**£5,000**	**£5,000**
Floorspace Capacity (sq.m gross)				
Barking	0	-1,698	-1,053	155
Dagenham	0	-614	124	687
Chadwell Heath/Green Lane	0	-120	280	769
Barking Riverside	0	-713	-244	472
Total	**0**	**-3,144**	**-892**	**2,084**

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