Lewisham Retail Impact Assessment and Town Centre Trends

Final Report

London Borough of Lewisham

December 2021

Contents

1.0 Introduction

Background

1.1 Lewisham Borough Council appointed Lichfields to prepare a Retail Impact Assessment and Town Centre Trends study to support the preparation of Lewisham's new Local Plan. This report provides up-to-date technical evidence that updates the findings of the Lewisham Retail Capacity Study Update 2019. The updated evidence will inform policy development concerning retail floorspace within centres and the future role of out-of-centre retail parks. The findings will reinforce the Borough's spatial strategy regarding the role and function of the town centre network hierarchy over the new Local Plan period (to 2040). This study examines structural changes in the retail sector and town centres and assesses the likely implications for the new Local Plan.

1.2 The implications of the latest planning policy and legislation changes affecting the retail sector and town centres have also been explored, including the introduction of the new use class E and changes to permitted development rights (PDR). These changes are likely to have a significant impact on future policy approaches to manage development and change within town centres.

1.3 The new spatial strategy supports the transformation of out-of-centre retail parks into mixed use areas including housing, employments and community uses in line with the London Plan. This report explores the appropriate role and mix of retail and other town centre uses that could successfully be provided within these locations, including the displacement of existing retail floorspace.

1.4 The new Local Plan explores the designation of a new mixed-use centre at Bell Green/Lower Sydenham, linked to the Bakerloo Line Extension. This new centre is expected to serve Lewisham's southern neighbourhoods. This study assesses the potential impact this new town centre could have on the existing town centre network.

Report structure

1.5 The study has two main stages, as follows:

1 Retail Centre Trends Study; and

2 Retail Impact Assessment.

1.6 These two stages are interlinked and the findings of both stages feed into an analysis of the implications for the emerging New Local Plan. Both stages have explored the implications for future policy approaches and the recommendations assess the appropriateness of emerging New Local Plan policies.

1.7 The four main elements of the Retail Centre Trends Study are:

1 planning policy overview - highlighting the implications of the revised NPPF and NPPG and the New London Plan and the recent changes to the Use Class Order and permitted development rights (PDR);

2 a summary of relevant market trends - including the recent impacts of Covid-19, home shopping behaviour and likely future impacts;

3 an update of the Retail Capacity Study Update 2019; and

4 an analysis of the likely changes to out-of-centre retail parks and freestanding large stores, in terms of floorspace displacement or growth and a shift in the mix of uses.

1.8 The Retail Centre Trends Study is set out in Sections 2, 3 and 4 of this report. Section 2 provides an overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for the Borough should reflect these underlying trends.

1.9 Section 3 sets out an update of the updated retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.

1.10 Section 4 reviews potential policy options for future development plan policy taking account of updated floorspace capacity projections and recent and proposed changes to the Use Classes Order (UCO) and permitted development rights (PDR).

1.11 The Retail Impact Assessment is set out in Sections 5 and 6 and tests proposed developments/ allocations in terms of their compliance with the impact and sequential tests, including current national policy position. It tests the proposed new town centre at Bell Green/Lower Sydenham, both individually and cumulatively with commitments and retail allocations. The potential displacement/change in retail floorspace at retail parks/freestanding stores has also been assessed. The assessment includes new comparison/convenience goods retail floorspace and food/beverage uses (eating and drinking).

1.12 Section 5 examines the existing hierarchy of centres within Lewisham and surrounding boroughs. This includes health checks for the six main centres in the Borough i.e., Catford and Lewisham (Major centres) and the seven District centres at Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham. These centres are most likely to be affected by new developments. An analysis of sequential sites has been undertaken based on a review of town centre and edge of centre site allocations. Section 6 sets out the finding of the retail impact assessment.

1.13 Section 7 summarises the main conclusions and recommendations.

2.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth has fuelled demand for new retail floorspace in the past. Since the recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

2.2 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2020 and 2021) for retail and leisure were published in October 2020 and now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort the 2021 base year position; and
- longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.3 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.4 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short term supply chain disruption has led to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery have benefitted at least in the short term. There is likely to be a longer terms structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.5 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g., most recently Gap.

2.6 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period with interval projections (i.e., 2021 base year to 2025, 2030 to 2035, and 2035 to 2040), development plan policy should assume population projections will return to projected levels by 2025. The first interval population projections at 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis.

2.7 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Since January 2021, sales have recovered to 9% above pre-Covid levels in May 2021.

2.8 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to November 2020.

2.9 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 have been consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

2.10 Food store on-line sales doubled during May and June 2020 but still represent a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, reducing slightly to 10.9% in May 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. The latest figures for May 2021 suggest on-line sales in this sector remain at around 25%, compared with the pre-Covid level of 16.1% in February 2020.

2.11 These Covid-19 affected trends are likely to continue until all restrictions are removed. It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post first lockdown data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent are higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.

2.12 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

Long-term expenditure trends

2.13 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.

2.14 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2026). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Lewisham Borough is likely to relate to population growth or qualitative areas of deficiency.

2.15 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

2.16 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

"After easing in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040."

2.17 The updated floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Demand for town centre floorspace

2.18 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. It seems likely there will be a sharp increase in shop vacancies in many town centres, as and when the impacts of the Covid-19 pandemic and recession are fully felt.

2.19 The number of vacant shop units within Lewisham's nine main centres was 176 in 2017. The average shop vacancy rate in these centres was 11.1%, slightly lower than the UK pre-Covid-19 average (12.4%). Lichfields' land use survey in July 2021 recorded 239 vacant units, an average vacancy rate of 15.1%, slightly above the latest UK average 14.6%. There figures suggest the Borough has experienced an increase in shop vacancies during the past four years broadly in line with national trends.

2.20 The national decline in the number of comparison goods retail outlets within town centres has been evident in Lewisham's main centres. The 2017 land use survey suggested the total number of comparison goods shops in the nine main centres was 367 outlets, 23.2% of all shop units. Lichfields' July 2021 survey suggests the number of comparison goods shops has reduced to 340 outlets, a net loss of 27 outlets. The number of convenience good shops has increased marginally from 217 outlets in 2017 to 225 outlets in 2021. Overall, the number of retail outlets reduced from 584 outlets in 2017 to 565 in 2021 (-19 outlets).

2.21 The number of food/beverage outlets has increased marginally from 330 to 335 outlets between 2017 and 2021, but this increase has not offset the net loss of retail outlets, and as a result there has been an increase in shop vacancies.

2.22 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.

2.23 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

2.24 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

2.25 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016.

2.26 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Lewisham with several Aldi and Lidl stores throughout the Borough.

Comparison retailers

2.27 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK e.g., on the edge of Lewisham town centre. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends slowed significantly before the Covid pandemic and are unlikely to re-emerge for the foreseeable future.

2.28 The demand for premises within the bulky goods sector, i.e., furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is generally well represented in Lewisham and neighbouring boroughs with concentrations of retail warehouses on purpose built retail parks. However, in the last 5 years there has been pressure to shift from bulky to non-bulky comparison goods and this trend is likely to continue.

2.29 Low density retail warehouses and retail parks have been the subject of higher density mixed use redevelopment proposals. This trend is particularly evident in London where residential land values are in comparison with retail warehouse parks. Recent examples include:

- Colosseum Retail Park, Enfield – July 2021 planning permission for demolition and comprehensive residential-led mixed use development.
- Southernwood Retail Park, Old Kent Road – current planning application for demolition and redevelopment.

2.30 This trend is also evident in Lewisham Borough, for example the recent demolition of the former Carpetright store in Lewisham and proposals to redevelop the Lewisham Retail Park at Loampit Vale in Lewisham. This trend is likely to continue in the future, fuel by the demand for high density residential development.

2.31 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres, such as Bromley and Bluewater. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Lewisham Borough (excluding Lewisham town centre) with a limited number of comparison goods national multiples present.

2.32 In general, operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger centres i.e., Bromley, Bluewater, Croydon, Westfields at Stratford and Central London. Other centres in Lewisham are at a lower level in the hierarchy and multiple operator demand may be lower in these centres in the future. Much of the occupier demand in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future.

2.33 The continuation of these trends will influence future operator requirements in Lewisham Borough with smaller centres becoming less attractive for new comparison goods multiple occupiers, and retailers increasingly looking to relocate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the Covid-19 pandemic. Within the main centres large anchor comparison goods stores have closed due to national restructure e.g., the closure of Bhs and Woolworth stores, which has created large voids in many town centres.

Charity and discount shops

2.34 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Lewisham Borough with a strong presence of charity shops in most of the main centres. In July 2021 there were 28 charity shops in the main centres, 8.2% of comparison goods shop, which is slightly below the UK average (9.9% of comparison goods outlet. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

2.35 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

2.36 The growth of money lending/pay day loan shops, betting shops, amusement centres and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These uses are sui generis with no permitted changes of use. This trend has been evident in Lewisham Borough with 29 betting shops/amusement centres, 1.8% of all outlets compared with the UK average of 1.1%. Hot food takeaways (110 outlets) occupy 7% of all outlets, compared with the UK average of 6.1%.

2.37 Past changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres.

The evening economy

2.38 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.39 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

2.40 The key categories for food and beverage offer are:

- **Impulse**: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- **Speed eating fast food**: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax**: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining**: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.41 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in Lewisham Borough with a small increase in food/beverage outlets between 2017 and 2021.

Pop-up spaces

2.42 The increase in vacant space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

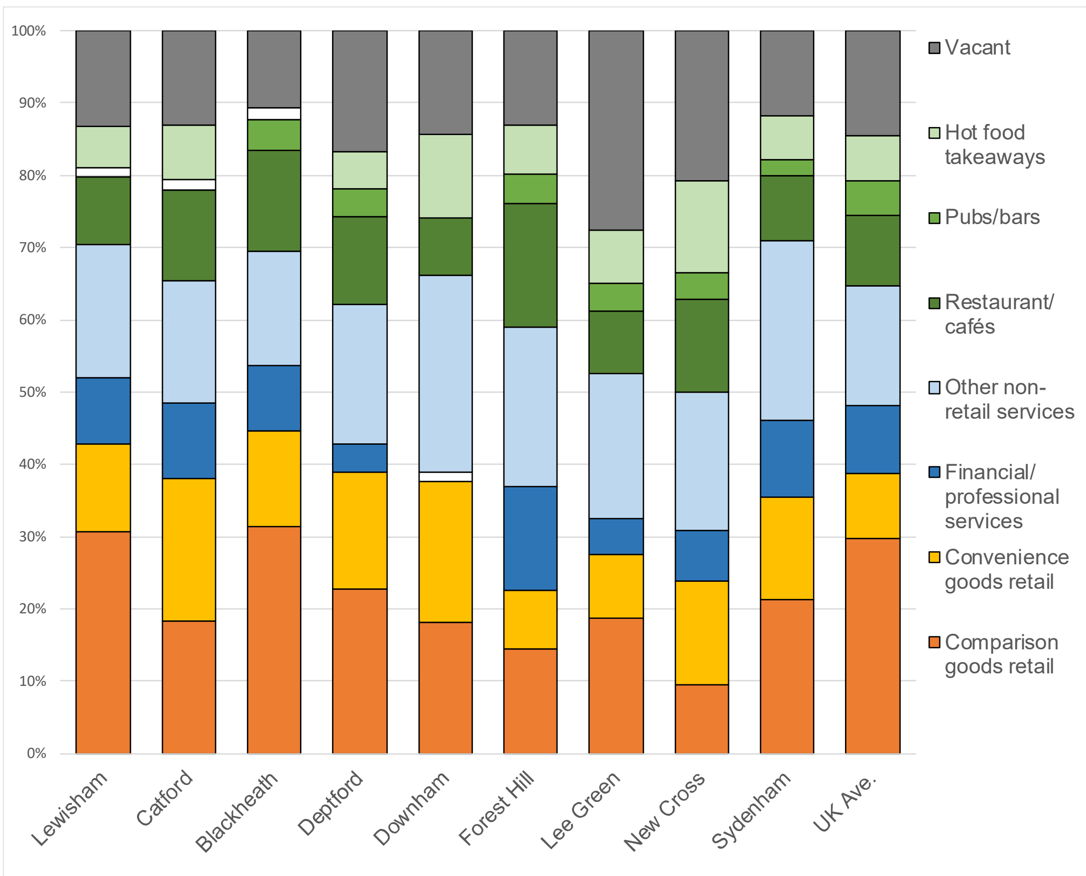
Diversity of main town centre uses in Lewisham Borough

2.43 Figure 2.1 shows the composition of the nine main centres in terms of the mix and proportion of different uses i.e., the proportion of shop units within each use category. This is compared with the recent (December 2020) Goad Plan average mix for all centres across the UK.

2.44 Most centres have a good mix of retail and service uses, but all centres except Lewisham and Blackheath have a lower proportion of comparison goods retail units than the national average. All centres in the Borough have a relatively high proportion of convenience goods retail and non-retail services.

2.45 Vacancy rates in the Borough are broadly consistent with the UK average (14.6%), but the vacancy rate is relatively high in Lee Green, Deptford and New Cross. The combined vacancy rate across the Borough's nine main centres is 15.1%.

Figure 2.1 Mix of retail and service uses



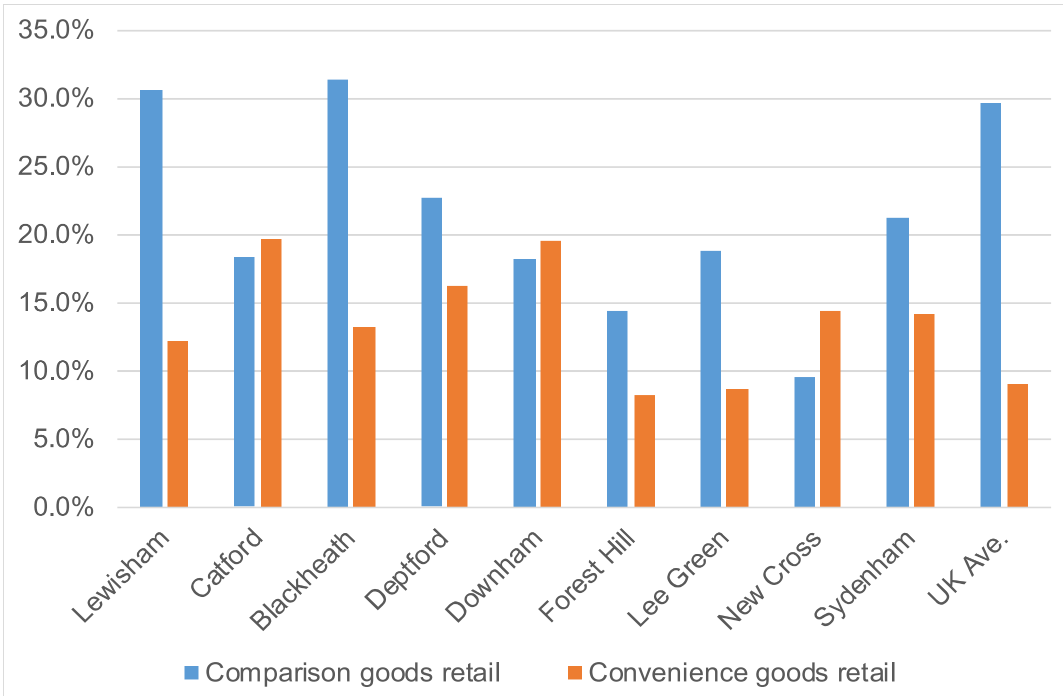
Source: Lichfields' land use survey July 2021 and Experian Goad Plans.

Retailer representation

2.46 Figure 2.2 compares the proportion of convenience and comparison retail units within the nine main centres compared with the national average. All centres except Lee Green and Forest Hill have a higher proportion of convenience goods units when compared with the national average. Convenience goods representation is particularly strong in Catford, Deptford and Downham. Conversely comparison goods retail is relatively weak in all centres except Lewisham and Blackheath.

2.47 Nationally, larger centres tend to have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is reflected in Lewisham's seven District Centres, apart from Blackheath. Convenience goods retail and non-retail services perform an important role in District Centres for relatively localised needs.

Figure 2.2 Proportion of comparison and convenience retail (% total units)



Source: Lichfields' land uses surveys July 2021 and Experian Goad Plans.

Service Uses

2.48 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 2.3 below summarises the proportion of units in different service categories uses compared to the Goad national average. The service uses are categorised as follows:

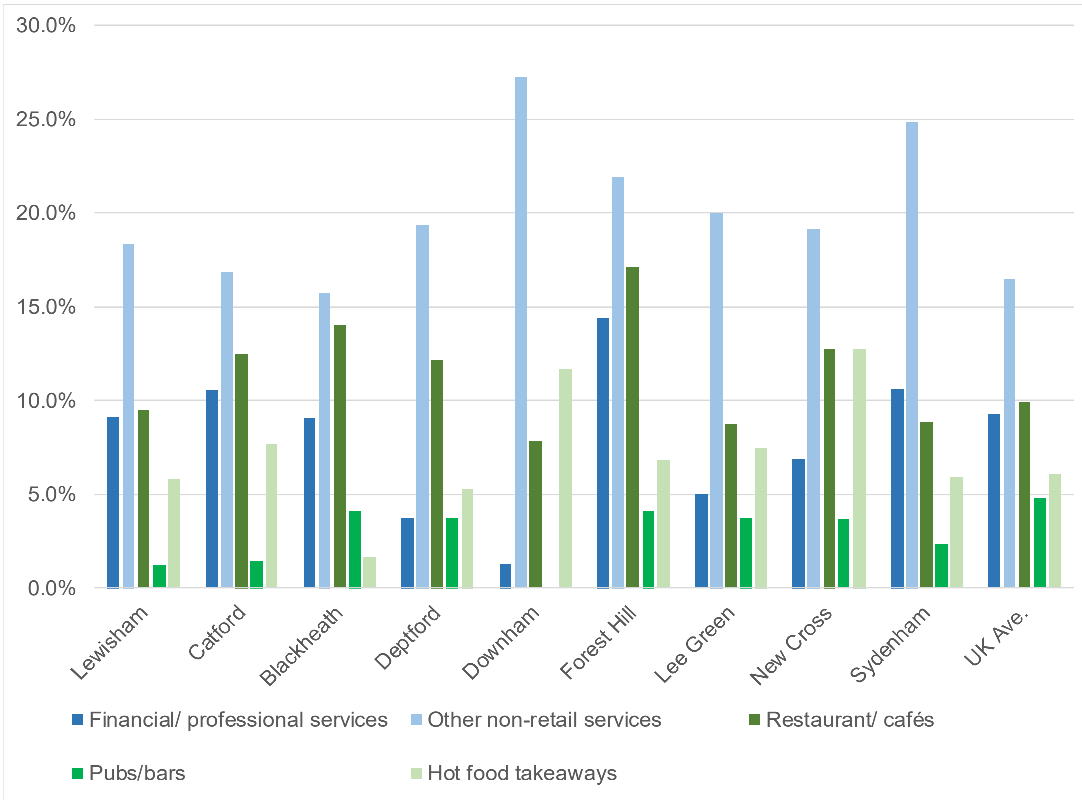
- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies.
- Food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways.
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

2.49 The provision of financial/professional is generally around the national average, apart from a relatively low provision in Deptford, Downham and Lee Green. All centres have a relatively high provision of other non-retail services.

2.50 The provision of café/restaurants is relatively strong in Forest Hill and Blackheath, but weaker in Downham and Lee Green. Catford, Downham and New Cross have a relatively high provision of hot food takeaways.

2.51 All centres have a reasonable provision of food/beverage outlets serving both the day-time and evening economies. Blackheath and Forest Hill appear to have the strongest provision of outlets serving the evening economy relative to their size i.e., restaurants and pubs/bars.

Figure 3.6 Proportion of non-retail service uses (% all units)



Source: Lichfields' land uses surveys July 2021 and Experian Goad Plans.

National policy and other changes

2.52 The NPPF indicates planning policies should (para. 86):

- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If insufficient edge of centre sites are identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.53 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.54 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. The Covid-19 crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

2.55 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g., Class A1 retail.

2.56 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

2.57 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g., medical services and some light industrial uses.

2.58 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

2.59 Other potential town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g., pubs/bars (A4), takeaways (A5), cinemas, live music venues, cinemas and betting shops. The inclusion of these uses as Sui Generis appears to have a dual function i.e., controlling uses such as betting shops and takeaways which can negatively impact town centre vitality when over concentrated, whilst protecting against the loss of other cultural facilities such as cinemas, music venues and pubs, most vulnerable to the impacts of Covid-19.

2.60 The previous distinction between Uses Classes A3, A4 and A5 uses has become more critical, with Class A3 uses (restaurant/cafés) now having more flexibility in the new Class E, but more limited flexibility for Class A4 (pubs/bars) and A5 (hot food takeaway) uses. Many Class A3 restaurants/cafés have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, Lewisham Council will need to re-categorise existing uses within town centres to reflect the new UCO, which will be helpful when considering appropriate policy options.

2.61 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies in the new Local Plan.

2.62 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were recently published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.

2.63 A new Class MA business and commercial to residential permitted development right, has replaced and introduced certain commercial to residential permitted development rights, from 1 August 2021. The new class MA is different to the current retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.64 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.

2.65 Class MA will allow many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.66 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty will be excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the current Class M PD right will fall away.

2.67 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions - medical or health services); Class D1(b) (non-residential institutions - crèche, day nursery or day centre) and Class D2(e) (assembly and leisure - indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, will benefit from the Class MA PD rights.

2.68 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres in Lewisham Borough are below this threshold and converting only part of a building is permitted.

2.69 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval, but periods of closure as a result of Government Covid-19 restrictions will not count towards the vacancy period where the building continues to be occupied by the owner or tenant. A key change is that prior approval will no longer be required to consider the impact arising from the loss of retail uses i.e., the implications for the town centre's overall vitality and viability.

2.70 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.71 The requirement to meet space standards will come into force. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard.

Summary

2.72 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. These trends have been accelerated by the impacts of the Covid pandemic. In response to these trends, town centres have changed and diversified. Before, the Covid pandemic, the food/beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

2.73 The most recent trends suggest vacancy rates have increased to over 14% across the UK and many high street retailers are experiencing difficulties. The national vacancy rate is expected to increase further when the full impact of the Covid-19 crisis is felt, and therefore a cautious approach to future growth is required. The vacancy rate has increased in the main centres in Lewisham Borough and is now slightly above the current national average. Some vacant shop units in peripheral areas of weaker centres may not return to retail uses for the foreseeable future. A more detailed analysis of the main centres in the Borough is set out in Section 4.

2.74 Shopping behaviour has and will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

3.0 Updated floorspace capacity assessment

Introduction

3.1 This section updates the quantitative and qualitative need for retail uses within Lewisham Borough based on the Retail Capacity Study Update 2019. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

3.3 All monetary values expressed in this study are at 2019 prices, consistent with Experian's base year expenditure figures for 2019 which is the most up to date information available. The Retail Capacity Study Update 2019 presents expenditure and turnover data at 2013, as a results figures within this report are not directly comparable.

Study area zones and population

3.4 A household telephone survey was undertaken in order to quantify existing shopping and leisure patterns in September 2015. The study area was sub-divided into 10 zones as shown in Appendix 1, based on postcode sectors. The zones reflect the primary catchment areas of the main destinations within Lewisham Borough.

3.5 The projected population within each zone between 2021 to 2040 is set out in Table 1 in Appendix 2, based on GLA 2019-base projections for wards (BPO Draft, Local Plan scenario 1 standard projection) for the Lewisham Borough area and GLA 2018 ward level population projections (housing led) for areas outside Lewisham Borough.

3.6 The base year 2021 population within the study area is 735,865. This population is projected to increase to 835,139 by 2040, an increase of 13.5% (0.67% per annum). By way of comparison, the Retail Capacity Study Update 2019 suggested a 2015 base year population figure of 714,201, projected to increase to 880,163 by 2040, an increase of 23.2% (0.84% per annum). Projected population growth is slightly lower than the previous forecast.

Retail Expenditure

3.7 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's most recent local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2019 have been obtained.

3.8 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 18 - October 2020) has been used to forecast expenditure within the study area. Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: +4.2%;
- comparison goods: +1.2%;

- leisure: -12.6%.

3.9 These short-term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;
- comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
- leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.

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

3.11 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2018 were:

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

3.12 Experian's projections suggest that these percentages will increase to 6.2% and 24.6% by 2025 respectively. The long-term Experian projections suggest an increase to 7.4% and 28.7% by 2040 respectively.

3.13 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 2040, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

3.14 Based on growth in population and per capita spending, total convenience goods spending within the study area is forecast to increase by +12% from £1,586 million in 2021 to £1,777 million in 2040, as shown in Table 3 (Appendix 2).

3.15 Comparison goods spending is forecast to increase by +79% between 2021 and 2040, increasing from £2,043 million in 2021 to £3,650 million in 2040, as shown in Table 3 (Appendix 3).

3.16 Food and beverage spending is forecast to increase by +68% between 2019 and 2038, increasing from £984 million in 2021 to £1,654 million in 2040, as shown in Table 3 (Appendix 4).

Growth in turnover densities

3.17 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +4.5% in 2022, and further growth is envisaged in the medium term (+3.0% per annum during 2023 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a decline in sales densities during 2021 and 2022 and no predicted growth in sales densities thereafter.

3.18 Experian does not provide projections for food and beverage sales densities. Experian’s projections suggest average food/beverage per person will be 23.9% lower in 2021 than in 2019, due to the impact of the Covid-19 crisis. Existing food/beverage facilities are expected to recover this lost expenditure and therefore a 31.4% growth in turnover is adopted between 2021 and 2024. An average growth rate of 1% per annum has been adopted thereafter.

Base year market shares

3.19 The turnover of facilities within Lewisham Borough is estimated based on the market shares or penetration rates adopted in the Retail Capacity Study Update 2019. To assess the capacity for new floorspace, penetration rates were estimated for shopping facilities based on a household shopper survey undertaken in September 2015.

3.20 The 2015 household survey has only been used to calculate the proportional distribution of expenditure between shopping destinations in the study area. The results have not been used to quantify the actual amount of available expenditure, or the level of SFT to be deducted or future levels of growth. These critical assumptions are based on Experian's latest data and post-Covid recommendations rather than the household survey results.

3.21 The September 2015 household survey results, in relation to the proportional distribution of retail expenditure between shopping destinations within the study area, are considered to be a robust base year starting point. Allowing for higher deductions for SFT, shopping patterns should not have changed significantly since 2015 because limited retail commitments have been completed during this period.

3.22 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3 respectively. The Retail Capacity Study Update 2019 did not assess the capacity for food/beverage floorspace. The market shares for food and beverage expenditure have been estimated from the 2015 household survey results are shown in Table 4 in Appendix 4.

Future market shares

3.23 Lewisham Borough's market share of expenditure within the study area is likely to change if extant planning commitments are implemented. Major mixed use developments are proposed in the north of the Borough, as follows:

- New Bermondsey/Surrey Canal Triangle – up to 6,300 sq.m of retail and non-retail services;
- Convoys Wharf - up to 10,330 sq.m of retail and non-retail services; and
- Oxestalls Road, Deptford – up to 3,571 sq.m of retail and non-retail services.

3.24 The Borough's retention of expenditure in the north of the Borough is relatively low and these proposed developments have the potential to increase the Borough market share.

3.25 There are other proposed developments at Lewisham Gateway (currently under construction) and the redevelopment of the Leegate Centre at Lee Green is proposed. These developments will also alter current shopping patterns.

3.26 Tables 12 in Appendix 2, 3 and 4 estimates the likely breakdown of new comparison and convenience goods retail and food/beverage floorspace that could be provided in these proposed developments. This breakdown is based on the planning application details i.e., descriptions of development and planning conditions controlling the mix of uses where available and Lichfields' estimates if unavailable. In overall terms, these main development commitments, if implemented, would results in the following net increase in floorspace:

- convenience goods retail - 6,013 sq.m gross
- comparison goods retail - 10,186 sq.m gross; and

- food/beverage - 10,546 sq.m gross.

3.27 The adjusted future market shares assuming these developments are implemented are set out in Tables 5 in Appendix 2, 3 and 4.

Capacity for convenience goods retail floorspace

3.28 Based on the market shares suggested by the 2015 household survey, available convenience goods expenditure currently attracted to Lewisham Borough in 2021 is shown in Table 5 in Appendix 2. These expenditure patterns have been projected forward to 2025, 2030, 2035 and 2040, based on the adjusted future market shares shown in Table 6 in Appendix 2. The results are is summarised in Table 13 in Appendix 2.

3.29 Convenience goods expenditure available to facilities within Lewisham Borough is expected to increase from £633.1 million in 2021 to over £728.01 million in 2040. This increase is primarily due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the main centres is set out in Table 3.1.

Table 3.1 Convenience goods base year turnover at 2021

	Turnover £M
Deptford	21.85
New Cross	39.04
Lewisham	219.69
Blackheath	3.20
Lee Green	88.18
Catford	55.69
Downham	19.10
Sydenham	24.88
Forest Hill	49.81
Bellingham/Bell Green	111.67
Total	**633.10**

Source: Table 5 in Appendix 2.

3.30 The benchmark expected turnover of existing convenience goods shopping provision in the Borough is set out in Table 11 in Appendix 2. The benchmark turnover is based on the respective company average sales densities for the main food store operators (source: Global Data) applied to the convenience goods sales floorspace of each store (source: ORC's StorePoint). The combined benchmark turnover of identified facilities is £560.66 million compared with the household survey derived estimated actual turnover of £633.10 million. These estimates suggest convenience goods facilities within the Borough are on average trading about 13% above the expected benchmark turnover. However, there are significant variations within the Borough. The actual turnover levels in the north of the Borough at Deptford and New Cross appears to be trading significantly below the expected benchmark turnover.

3.31 Table 13 in Appendix 2 subtracts the turnover of existing floorspace and proposed commitments from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development (over and above commitments) in the future. There is an estimated existing convenience goods expenditure surplus of +£72.44 million in 2021, primarily due to high levels of trading within the central area of Lewisham Borough.

3.32 The implementation of commitments would reduce this surplus to +£50.15 million at 2025, as shown in Table 13 in Appendix 2. This expenditure surplus is projected to increase to +£67.01 million by 2030. Continued population growth creates a larger surplus of +£93.35 million by 2035, increasing to +£112.22 million by 2040. Even excluding existing above average trading levels, these projections suggest there is potential for further convenience goods retail development over and above commitments.

3.33 The deficit/surplus expenditure projections are converted into floorspace estimates Table 14 in Appendix 2 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 3.2.

3.34 The northern area of the Borough has an over-supply of floorspace projected up to 2040, suggesting limited capacity for further retail development. This over-supply could be counter-balanced by projected floorspace capacity in the central area of the Borough. This floorspace capacity is sub-divided into the five neighbourhood areas identified in the new Local Plan.

3.35 The overall capacity in the Borough up to 2040 is 9,342 sq.m net (13,360 sq.m gross).

Table 3.2 Convenience goods floorspace capacity (sq.m) - cumulative

Neighbourhood Area	2025	2030	2035	2040
Net Sales floorspace				
Lewisham Northern	-3,560	-2,900	-2,261	-1,872
Lewisham Central	3,046	3,451	4,201	4,806
Lewisham Eastern	2,493	2,540	2,685	2,881
Lewisham Southern	1,451	1,668	2,114	2,346
Lewisham Western	419	497	710	861
Net Sales Total	**3,850**	**5,254**	**7,449**	**9,022**
Gross floorspace				
Lewisham Northern	-5,085	-4,143	-3,230	-2,675
Lewisham Central	4,351	4,929	6,002	6,866
Lewisham Eastern	3,562	3,628	3,835	4,116
Lewisham Southern	2,073	2,382	3,019	3,352
Lewisham Western	599	710	1,015	1,230
Gross Total	**5,500**	**7,506**	**10,642**	**12,889**

Source: Table 14, Appendix 2.

3.36 The Lewisham Retail Study Update 2019 projected capacity for 9,900 sq.m net of convenience goods retail floorspace up to 2040. The updated floorspace projection is similar (9,022 sq.m net).

Capacity for comparison goods floorspace

3.37 Available comparison goods expenditure currently attracted to Lewisham Borough in 2021 is shown in Table 4 in Appendix 3. These expenditure patterns have been projected forward to 2025, 2030, 2035 and 2040, based on the adjusted future market shares shown in Table 5 in Appendix 3. The results are is summarised in Table 13 in Appendix 3.

3.38 Comparison goods expenditure available to facilities within Lewisham Borough is expected to increase from £573.23 million in 2021 to over £1,055 million in 2040. A breakdown for the main centres is set out in Table 3.3.

Table 3.3 Comparison goods base year turnover at 2021

	Turnover £M
Deptford	8.64
New Cross	17.31
Lewisham	315.16

Blackheath	5.76
Lee Green	17.15
Catford	39.95
Catford out of centre	61.98
Downham	2.01
Sydenham	35.78
Forest Hill	27.20
Bell Green	42.30
Total	**573.23**

Source: Table 5 in Appendix 3.

3.39 The Lewisham Retail Study Update 2019 suggested comparison goods retail sales floorspace within the Borough was 93,225 sq.m net. The 2021 turnover of £573.23 million suggests a relatively high average sales density of over £6,700 per sq.m net. These figures suggest comparison good sales floorspace within the Borough is trading healthily despite difficult current market conditions.

3.40 Table 13 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) and commitments. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2040 i.e., existing retail businesses will absorb expenditure growth and the comparison goods turnover of commitments. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

3.41 At 2025 there is a projected expenditure deficit of -£51.31 million, due to the implementation of commitments. The expenditure deficit will increase slightly to -£51.43 million by 2035 but there will be a small surplus by 2040 (£3.34 million). These long-term projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace for the foreseeable future. The deficit/surplus expenditure projections have been converted into floorspace estimates in Table 14 in Appendix 3 and the results are summarised in Table 3.4 below.

3.42 The overall over-supply of comparison goods floorspace in the Borough up to 2035 is -2,921 sq.m net (-3,651 sq.m gross).

Table 3.4 Comparison goods floorspace capacity (sq.m gross) - cumulative

Neighbourhood Area	2025	2030	2035	2040
Net Sales floorspace				
Lewisham Northern	-1,498	-1,028	-461	-36
Lewisham Central	-4,259	-3,769	-1,434	816
Lewisham Eastern	-990	-1,005	-934	-808
Lewisham Southern	-295	-303	-50	136
Lewisham Western	-448	-446	-43	222
Net Sales Total	**-7,489**	**-6,552**	**-2,921**	**329**
Gross floorspace				
Lewisham Northern	-1,872	-1,286	-576	-45
Lewisham Central	-5,324	-4,711	-1,793	1,020
Lewisham Eastern	-1,237	-1,256	-1,167	-1,010

Lewisham Southern	-369	-379	-62	170
Lewisham Western	-560	-558	-53	277
Gross Total	**-9,362**	**-8,190**	**-3,651**	**411**

Source: Table 14, Appendix 3.

3.43 The Lewisham Retail Study Update 2019 projected capacity for 15,900 sq.m net of comparison goods retail floorspace up to 2040, compared with only 329 sq.m net in this update. The main reasons for this significant difference are Experian's lower expenditure projections (including higher deductions for on-line shopping) and higher growth in turnover densities, resulting in less available expenditure for new floorspace.

Capacity for food/beverage floorspace

3.44 Available food and beverage expenditure is projected forward to 2025, 2030, 2035 and 2040, and is summarised in Table 13 in Appendix 4. The amount of expenditure attracted to Lewisham Borough is expected to increase from £327.93 million in 2021 to over £585 million in 2040. Table 13 in Appendix 4 subtracts the turnover of existing floorspace and commitments from available expenditure to calculate the amount of surplus expenditure available for new development. At 2025 there is a relatively large expenditure deficit of -£38.31 million due to the recovery of existing turnover to pre-Covid levels in 2019. However, continued population and expenditure growth creates an expenditure surplus of +£8.09 million at 2035 increasing to +£21.28 million by 2040. Floorspace capacity projections are shown in Table 14 in Appendix 4 and summarised in Table 3.5 below.

Table 3.5 Food/beverage floorspace capacity (sq.m gross) - cumulative

Neighbourhood Area	2025	2030	2035	2040
Gross floorspace				
Lewisham Northern	-2,780	-1,297	-429	81
Lewisham Central	-2,559	-621	342	1,079
Lewisham Eastern	-1,160	132	517	1,067
Lewisham Southern	-102	165	342	426
Lewisham Western	-762	80	635	870
Gross Total	**-7,363**	**-1,540**	**1,408**	**3,523**

Source: Table 14, Appendix 4.

3.45 The overall capacity in the Borough up to 2040 is 3,523 sq.m gross.

Transformation of out-of-centre retail parks

3.46 Lewisham Council's new spatial strategy supports the transformation of out-of-centre retail parks into mixed use areas including housing, employments and community uses in line with the London Plan Policy SD7 and Policy H1.

3.47 Low density retail warehouse parks in the Borough provide opportunities for higher density mixed use developments. The Lewisham Retail Capacity Study Update 2019 identified just under 30,000 sq.m net of comparison goods retail sales floorspace in edge or out of centre locations as shown Table 11 in Appendix 2. Half of this sales floorspace is concentrated at Bell Green (15,212 sq.m net). Ravensbourne Retail Park is the next largest (5,871 sq.m net) concentration. Other retail warehouse provision with redevelopment potential is Homebase/ Argos on Bromley Road.

3.48 The negative comparison goods retail capacity projections up to and beyond 2035 shown in Table 3.4 above, suggest there may be pressure to redevelop some of these retail warehouse facilities, particularly if premises become vacant.

3.49 The analysis of comparison goods expenditure patterns in 2021, as shown in Table 5 in Appendix 3, indicates the current turnover of retail warehouses at Bell Green and the Catford area is about £104 million. If these out of centre retail parks are redeveloped and the lost retail floorspace is not re-provided, then comparison goods expenditure should be released for other shopping destinations i.e., the trade (£104 million) currently attracted to these retail warehouses will be spent at other destinations and/or on-line. There is potential for some of this trade to be captured by retail facilities in the Catford and Lewisham major centres.

3.50 The retail capacity model in Appendix 3 has been amended to assume all the out-of-centre comparison goods retail floorspace at Bell Green and Catford is redeveloped at 2025 and not replaced thereafter. This sensitivity analysis is set out in Tables 15 and 16 in Appendix 3.

3.51 The release of comparison goods expenditure reduces the 2025 expenditure deficit from -£51.31 million to only -£2.49 million. These figures suggest the redevelopment of out of centre retail warehouses would only counter-balance the over-supply of retail floorspace created by planned commitments at 2025 but could create additional capacity in the longer term. The results of the sensitivity analysis are summarised in Table 3.6.

Table 3.6 Comparison goods floorspace capacity (sq.m gross) – cumulative without out of centre retail warehouses

Neighbourhood Area	2025	2030	2035	2040
Net Sales floorspace				
Lewisham Northern	-1,234	-830	-352	9
Lewisham Central	630	1,154	3,406	5,505
Lewisham Eastern	-806	-826	-752	-623
Lewisham Southern	32	41	46	58
Lewisham Western	1,015	1,022	1,492	1,792
Net Sales Total	**-363**	**560**	**3,841**	**6,741**
Gross floorspace				
Lewisham Northern	-1,543	-1,038	-440	12
Lewisham Central	787	1,442	4,258	6,882
Lewisham Eastern	-1,008	-1,033	-941	-779
Lewisham Southern	40	51	57	72
Lewisham Western	1,269	1,277	1,866	2,240
Gross Total	**-454**	**700**	**4,801**	**8,426**

Source: Table 16, Appendix 3.

3.52 It is unlikely all the out of centre retail warehouses in the Borough will be redeveloped over the plan period, particularly those not allocated for redevelopment in the emerging site allocations. The sensitivity analysis assumes all out of centre retail warehouse sites will be redeveloped, and this analysis represents the maximum release of comparison goods expenditure. Furthermore, recent examples of similar retail warehouse park redevelopments in London indicate some retail and commercial floorspace is re-provided at ground floor level to serve the residential uses above.

3.53 This re-provided commercial floorspace is normally flexible i.e., a mix of retail, food/beverage non-retail services and leisure uses. Some small element of comparison goods retail floorspace is likely to be provided. The scale of re-provided floorspace is normally commensurate with the amount of residential and employment uses within the development i.e., facilities sufficient to serve the local needs generated by the development.

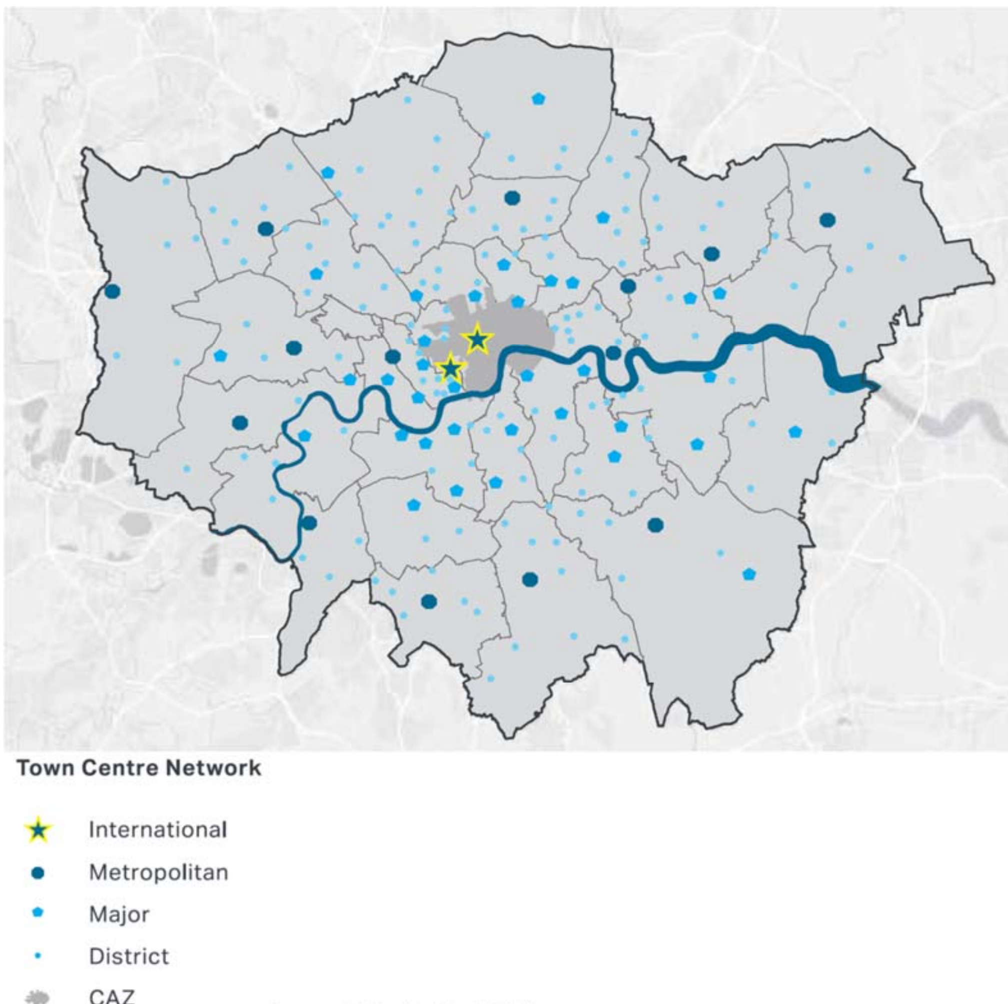
3.54 The redevelopment of retail warehouse parks in Lewisham Borough could provide local facilities e.g., convenience goods retail, food/beverage and non-retail services required to serve the residential population accommodated by the development. These local facilities will, if provided, accommodate some of the convenience good retail and food/beverage floorspace capacity projections in Tables 3.2 and 3.5 above. If comparison goods floorspace within the retail warehouse parks are not replaced, in full or partially, then comparison goods expenditure should be released for other shopping destinations, as indicated above. This released comparison goods trade could assist growth in shopping facilities within the main centres in Catford and Lewisham, which could be a benefit of rationalisation/consolidation of comparison goods retail floorspace at retail parks.

4.0 The existing hierarchy of centres

The London Plan hierarchy

4.1 The London Plan (2021) sets out the London wide hierarchy of main centres down to District Centre level, as shown below in Figure 4.1. International Centres are in Central London. Westfield at Shepherds Bush is expected to become a new International Centre. The outer London suburbs are served by Metropolitan centres including Bromley, Croydon and Stratford. Lewisham Borough has no Metropolitan centres but has two Major Centres at the next third tier level in the hierarchy, i.e., Catford and Lewisham town centres. The Borough has seven District centres at Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham.

Figure 4.1 London's town centre network



Source: GLA London Plan (2021)

4.2 The London Plan indicates Metropolitan Centres serve wide catchment areas covering several boroughs, typically containing at least 100,000 sq.m of retail, leisure and service floorspace and a high proportion of higher order comparison goods shopping when compared with its convenience goods offer. These centres also have a significant employment, leisure and service functions and civic and public buildings.

4.3 Major Centres such as Lewisham, Catford, Eltham, Peckham and Woolwich usually have over 50,000 sq.m of retail, leisure and service floorspace but only have a borough wide catchment area. District centres are smaller between 5,000 to 50,000 sq.m of retail, leisure and service floorspace space. Local and neighbourhood centres are not identified in the London Plan and are expected to serve localised catchment areas. The scale and mix of uses within the sub-region based on data from the GLA's 2017 London Town Centres Health Checks is shown in Table 4.1.

Table 4.1 GLA London main town centres in the Lewisham sub-region

Centre	London Plan classification	No. retail and service outlets	Comparison goods floorspace sq.m gross	Convenience goods floorspace sq.m gross	Service floorspace sq.m gross	Total floorspace sq.m gross
West End	International	1,289	445,847	15,874	12,735	474,456
Croydon	Metropolitan	385	157,155	13,850	9,800	180,805
Stratford	Metropolitan	292	129,610	23,590	2,510	155,710
Bromley	Metropolitan	295	99,118	9,190	6,370	114,678
Lewisham	Major	197	46,232	13,670	4,050	63,952
Peckham	Major	272	28,440	20,134	6,160	54,734
Woolwich	Major	185	27,823	14,040	6,450	48,313
Canary Wharf	Major	158	30,143	13,190	2,580	45,913
Orpington	Major	134	21,872	12,390	4,970	39,232
Eltham	Major	130	24,367	7,920	3,180	35,467
Canada Water	District	72	18,130	9,270	2,090	29,490
Catford	Major	103	13,690	10,200	4,720	28,610
Beckenham	District	116	7,260	11,250	4,530	23,040
Walworth Road	District	99	10,660	5,630	3,630	19,920
Deptford	District	140	7,750	6,920	3,000	17,670
Penge	District	77	7,990	7,200	2,270	17,460
North Greenwich	District	3	4,232	9,466	3,694	17,392
Sydenham	District	95	6,120	4,500	4,670	15,290
Upper Norwood/Crystal Palace	District	90	6,650	5,330	2,400	14,380
New Cross	District	43	3,460	8,230	1,160	12,850
Dulwich - Lordship Lane	District	73	4,980	2,670	2,000	9,650
Forest Hill	District	66	3,238	3,230	2,640	9,108
South Norwood	District	77	2,620	3,230	3,150	9,000
Greenwich West	District	90	4,840	3,490	660	8,990
Elephant and Castle	District	54	4,250	2,940	420	7,610
Blackheath	District	73	3,340	1,520	1,560	6,420
East Greenwich	District	58	1,890	2,580	1,850	6,320
Downham	District	45	1,980	2,480	1,320	5,780
Lee Green	District	34	362	2,499	362	3,223

Source: GLA 2017 London Town Centres Health Check data.

Note – data based on Goad Plan areas rather than Local Plan designated centre boundaries.

4.4 This data demonstrates that GLA International and Metropolitan Centres have over 100,000 sq.m of retail/service floorspace. Catford and Lewisham are significantly smaller than the bottom end of this range, consistent with their designation as Major rather than Metropolitan

Centre. Major Centres range from about 30,000 to 65,000 sq.m, and District Centres are below 25,000 sq.m but vary significantly in size.

Designated centres in Lewisham Borough

4.5 The centre boundaries as proposed in the new Lewisham Local Plan (Regulation 18 Stage) are shown in the extract map shown below. The land uses are summarised in Table 4.2, based on Lichfields' July 2021 land use survey for the main centres as adopted in the Policies Map 2015.

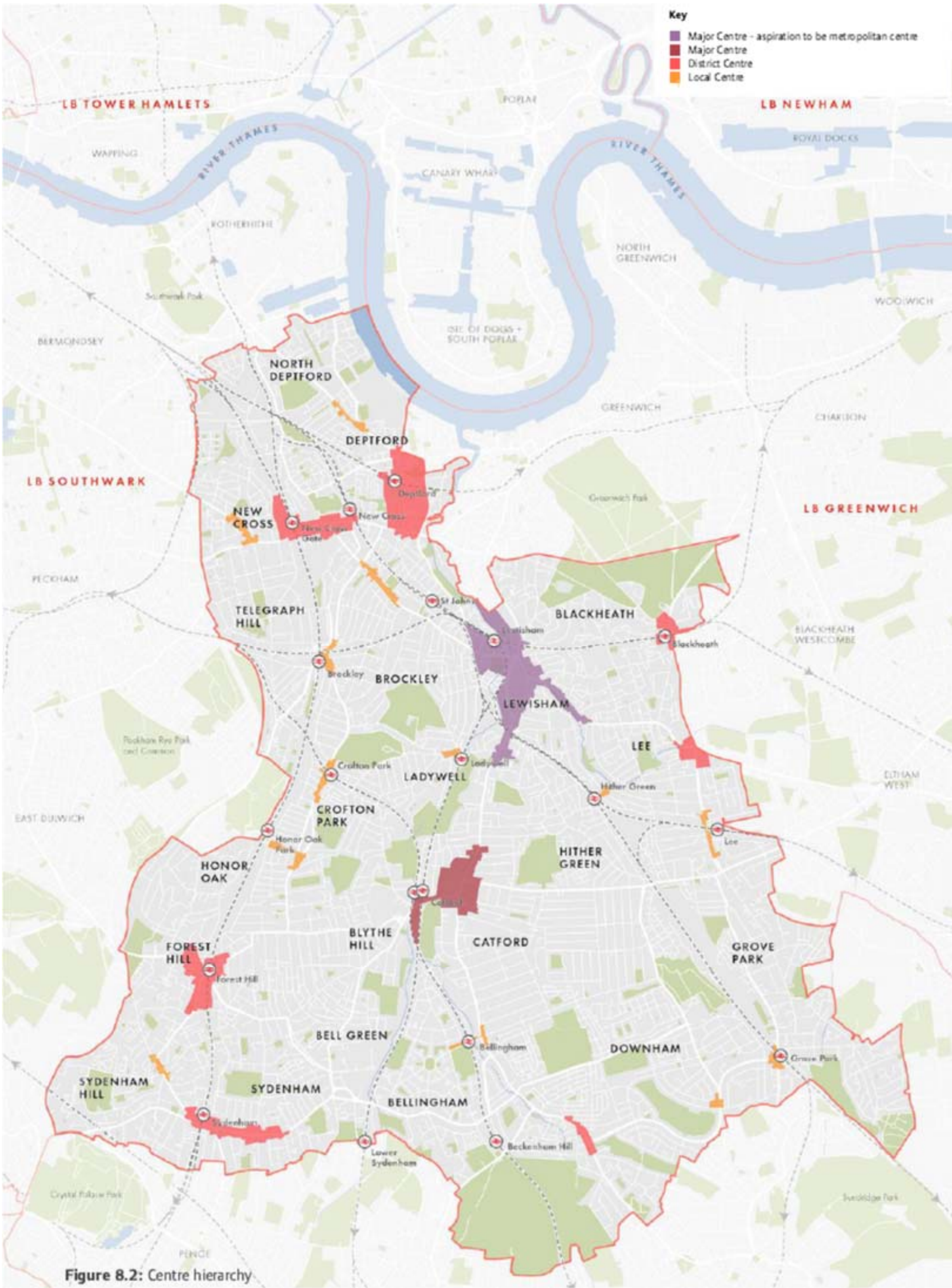


Figure 8.2: Centre hierarchy

4.6 Lewisham and Catford are the largest centre in terms of retail floorspace and national multiple retailers, consistent with the GLA description of Major Centres. The seven District centres are generally smaller and have less national multiple retailers. All centres have a reasonable mix of retail facilities and non-retail services, as shown in Table 4.2.

Table 4.2 Lewisham Borough main designated centres – number of outlets by use

Centre	Total retail service units	Comparison goods retail	Convenience goods retail	Food/ beverage	Non-retail services	Vacant units
Major centres						
Lewisham	327	99	40	54	90	44
Catford	208	38	41	45	57	27
District centres						
Deptford	264	60	43	56	61	44
New Cross	188	18	27	55	49	39
Sydenham	169	26	24	29	60	20
Forest Hill	146	21	13	41	53	19
Blackheath	121	38	16	25	30	13
Lee Green	80	15	7	16	20	22
Downham	77	14	15	15	22	11
Total	**1,580**	**339**	**225**	**335**	**442**	**239**

Source: Lichfields' land uses survey (July 2021).

Lewisham Major Centre

4.7 Lewisham is in the central area of the Borough and is identified as a Major Centre in the London Plan. The key roles of Lewisham include:

- convenience shopping: five large food stores operated by Asda, Sainsbury's, Tesco, Lidl and Iceland, supported by a wide selection of small specialist food shops;
- comparison shopping: a good range of multiple retailers selling a range of higher and lower order comparison goods;
- services: an extensive range of high street national banks/building societies, cafés, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs, a bowling alley, amusement centres and betting shops; and
- community facilities: places of worship, health clubs, sports centre and dental surgeries.

4.8 The main concentration of retail facilities is focused within the Lewisham Centre, which is a managed covered shopping centre. The High Street provides a pedestrianised area that accommodates a popular street market. The centre is linear and relatively fragmented, dissected by railway lines and the busy A21. Considerable development has recently been completed and further investment is under construction at the Lewisham Gateway, including a proposed cinema.

Mix of uses and occupier representation

4.9 Lewisham has a total of 327 retail and service units (source: Lichfields' land use survey 2021). The diversity of uses within Lewisham is set out in Table 4.3 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

4.10 Lewisham town centre is similar when compared with the national average in terms of the proportion of comparison retailers, but one would expect a relatively large centre such as Lewisham to have a higher than average comparison retail provision. Lewisham has a relatively strong provision of convenience goods outlets and non-retail services. The provision of restaurants, pubs and bars serving the night-time economy is below the GLA and national averages.

Table 4.3 - Mix of shop and service uses – Lewisham

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	99	30.3	37.7	29.7
Convenience goods retail	40	12.2	12.8	9.1
Financial/professional services	30	9.2	) 14.7	9.3
Other non-retail services	60	18.3	)	16.5
Restaurants/cafés	31	9.5	14.9	9.9
Pubs/bars	4	1.2	3.8	4.8
Hot food takeaways	19	5.8	7.4	6.1
Vacant	44	13.5	8.6	14.6
Total	**327**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.11 There were 44 vacant retail units within Lewisham in July 2021, equating to a vacancy rate of 13.5%, which is much higher than the London average in 2017, but marginally lower than the UK average in 2020. There are some prominent and relatively large vacant units within the Lewisham Centre.

4.12 The number of multiple comparison retailers is reasonable and reflects Lewisham's size and role. The multiple comparison retailers include:

Table 4.4 – Lewisham's comparison multiples

3 Store	EE	Poundland	The Fragrance Shop
Body Shop	Foot Locker	Primark	The Perfume Shop
Boots	Flying Tiger	Screwfix	The Works
Card Direct	Holland and Barrett	Select	TK Maxx
Card Factory	H&M	Shoe Zone	Vision Express
CeX	J D Sports	Smiggle	Vodaphone
Claires	Marks & Spencer	Specsavers	Warren James
Clarks	Matalan	Sports Direct	WH Smiths
Deichmann	O2	Superdrug	Wilko

Source: Lichfields' land use survey July 2021

New London Plan indicators

4.13 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Lewisham's designations are:

- Network classification: Major Centre (future potential for Metropolitan)
- Night-time classification: NT3 (more than local significance)
- Commercial growth potential: High (high levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: C (protect small office capacity)
- Strategic area for regeneration: Yes

Summary

4.14 Lewisham is the Borough's largest centre, which is under-going significant development and regeneration. It is identified as a centre for commercial growth and regeneration within the London Plan. The centre is relatively busy and provides a mix of covered shopping, pedestrian free areas and a large street market. The centre has a good mix of retail and non-retail services, but the night-time economy is relatively under-provided and is only categorised as being of local significance in the London Plan. The centre appears to be trading healthily and is vital and viable, although the shop vacancy is relatively high for a centre of its size and importance and peripheral parts of the centre appear to be more vulnerable.

Catford Major Centre

4.15 Catford is also in the central area of the Borough, just to the south of Lewisham town centre. It is identified as a Major Centre in the London Plan. The key roles of Catford include:

- convenience shopping: four large food stores operated by Tesco, Aldi, Iceland and Lidl, supported by a wide selection of small specialist food shops;
- comparison shopping: a reasonable range of multiple and independent retailers selling a range of higher and lower order comparison goods;
- services: a reasonable range of high street national banks/building societies, estate agents, cafés, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: the Broadway Theatre, AirThrill, several pubs and betting shops; and
- community facilities: health centre, places of worship, health/fitness gyms clubs, after school club, dental surgeries and vets.

4.16 The main concentration of retail facilities is focused within the Catford Broadway and along Rushey Green. Catford Island Retail Park provides large retail and leisure units. The centre is dissected by busy main roads i.e. the A205 and A21.

Mix of uses and occupier representation

4.17 Catford has 327 retail and service units (source: Lichfields' land use survey 2021). The diversity of uses within Catford is set out in Table 4.5 and is compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.5 - Mix of shop and service uses – Catford

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	38	18.3	37.7	29.7
Convenience goods retail	41	19.7	12.8	9.1
Financial/professional services	22	10.6	) 14.7	9.3
Other non-retail services	35	16.8	)	16.5
Restaurants/cafés	26	12.5	14.9	9.9
Pubs/bars	3	1.4	3.8	4.8
Hot food takeaways	16	7.7	7.4	6.1
Vacant	27	13.0	8.6	14.6
Total	**208**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.18 Catford has a very low provision of comparison goods outlets for a centre of its size, significantly below the GLA and national averages. Catford has a strong provision of convenience goods outlets, restaurant/cafés and takeaways.

4.19 There were 27 vacant retail units within Catford in July 2021, a vacancy rate of 13%, which is much higher than the London average in 2017, but marginally lower than the UK average in 2020. Vacant units are spread throughout the centre with no obvious concentrations.

4.20 The number of multiple comparison retailers is lower than Lewisham town centre, but higher than the seven district centres. The multiple comparison retailers include:

Table 4.6 – Catford's comparison multiples

Boots	JD Sports	Savers	Superdrug
Card Factory	Pound Land	Shoe Zone	Travis Perkins
Dreams	Poundstretcher	Specsavers Opticians	

Source: Lichfields' land use survey July 2021

New London Plan indicators

4.21 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Catford's designations are:

- Network classification: Major Centre
- Night-time classification: NT3 (more than local significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.22 Catford is the Borough's second largest centre. The centre is relatively busy and provides a mix of covered shopping and pedestrian free areas and a street market. The centre has a good mix of retail and non-retail services but a relatively limited number of national multiples. The centre appears to be trading satisfactorily and is vital and viable, although the shop vacancy is relatively high for a centre of its size and importance. In addition, the London Plan identifies on low potential for commercial growth.

Deptford District centre

4.23 Deptford is in the north of the Borough and is identified as a District Centre in the London Plan. The key roles of Deptford include:

- convenience shopping: small/medium sized food stores operated by Asda, Iceland and Tesco Express, supported by a wide selection of small specialist food shops;
- comparison shopping: a reasonable range of independent retailers selling a range of specialist products;
- services: a reasonable range of cafés, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: a good selection of bars, pubs and restaurants, a small cinema, snooker hall and betting shops; and
- community facilities: places of worship and nurseries.

4.24 Deptford is a linear 'T' shaped centre with the main concentration of retail facilities along Deptford High Street. New Cross Road and Deptford Broadway are secondary shopping areas on the busy A2. The centre has benefitted from development near Deptford train station.

Mix of uses and occupier representation

4.25 Deptford District Centre has 264 retail and service units (source: Lichfields' land use survey 2021) which is higher than the Major Centre at Catford. However, most of the units are small and occupied by independent traders. The diversity of uses within Deptford is set out in Table 4.7 and is compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.7 - Mix of shop and service uses – Deptford

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	60	22.7	37.7	29.7
Convenience goods retail	43	16.3	12.8	9.1
Financial/professional services	10	3.8	) 14.7	9.3
Other non-retail services	51	19.3	)	16.5
Restaurants/cafés	32	12.1	14.9	9.9
Pubs/bars	10	3.8	3.8	4.8
Hot food takeaways	14	5.3	7.4	6.1
Vacant	44	16.7	8.6	14.6
Total	**264**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.26 Deptford has a relatively low provision of comparison goods outlets for a centre of its size, significantly below the GLA and national averages. Deptford has a strong provision of convenience goods outlets but most of these outlets are small independent traders. The provision of restaurant/cafés and pubs/bars is relatively strong when compared with other centres in the Borough. This includes outlets within the railway arches near Deptford station.

4.27 There were 44 vacant retail units within Deptford in July 2021, a high vacancy rate of 16.7%, much higher than the London average in 2017, but only marginally higher than the UK average in 2020. Vacant units are spread throughout the centre with no obvious concentrations.

4.28 There are a limited number of multiple comparison retailers in Deptford. These include Poundland, CeX and charity shops.

New London Plan indicators

4.29 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Deptford's designations are:

- Network classification: District centre
- Night-time classification: n/a
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.30 Deptford is the largest district centre in the Borough in terms of the number of units, but the shop vacancy rate is relatively high. It is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification. The centre is relatively busy and provides a good range and choice of independent outlets, but peripheral parts of the centre appear to be more vulnerable.

New Cross District centre

4.31 New Cross is in the north of the Borough and is identified as a District centre in the London Plan. The key roles of New Cross include:

- convenience shopping: a large Sainsbury's superstore and Iceland, supported by a selection of small food shops;
- comparison shopping: a limited range of predominantly independent comparison goods shops;
- services: predominantly estate agents, restaurant/cafés, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs and nightclubs; and
- community facilities: places of worship, health and dental surgeries.

4.32 The designated district centre is fragmented into three main areas i.e., New Cross Gate Retail Park, New Cross Road East and West. The centre is on the A2 and the area is relatively congested. Goldsmith College is located at the heart of the centre.

Mix of uses and occupier representation

4.33 New Cross has 188 retail and service units (source: Lichfields' land use survey 2021). The diversity of uses within New Cross is set out in Table 4.8 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.8 - Mix of shop and service uses – New Cross

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	18	9.6	37.7	29.7
Convenience goods retail	27	14.4	12.8	9.1
Financial/professional services	13	6.9	) 14.7	9.3
Other non-retail services	36	19.1	)	16.5
Restaurants/cafés	24	12.8	14.9	9.9
Pubs/bars	7	3.7	3.8	4.8
Hot food takeaways	24	12.8	7.4	6.1
Vacant	39	20.7	8.6	14.6
Total	**188**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.34 New Cross has a very low provision of comparison goods outlets, significantly below the GLA and national averages. It has the third lowest number of comparison goods shops of the 9 main centres in the Borough. The centre has a strong provision of convenience goods outlets, hot food takeaways and other non-retail services. There were 39 vacant retail units in New Cross in July 2021, a vacancy rate of over 20%, which is much higher than the London and UK averages.

New London Plan indicators

4.35 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. New Cross's designations are:

- Network classification: District centre
- Night-time classification: NT3 (more than local significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.36 New Cross has a reasonably large number of outlets (188 units) but the centre is fragmented and function as two, if not three, different shopping destination. The centre has excellent public transport links with two railway stations and several bus route. The centre suffers from significant traffic congestions but benefits from the student population at Goldsmith's College. The centre is relatively busy and provides a reasonable range of independent outlets. It is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification. The shop vacancy rate is relatively high and peripheral parts of the centre appear to be vulnerable.

Sydenham District centre

4.37 Sydenham is in the south west of the Borough and is identified as a District Centre in the London Plan. The key roles of Sydenham include:

- convenience shopping: small/medium sized food stores operated by Lidl, Sainsbury's Local and Tesco Express, supported by a small selection of independent food shops;
- comparison shopping: a reasonable range of independent retailers;
- services: a reasonable range of cafés, restaurants, takeaways, estate agents and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs, a small bingo hall and betting shops; and
- community facilities: health clubs and dental/medical surgeries.

4.38 Sydenham is a long linear centre stretching along Sydenham Road. The centre is served by Sydenham railway station.

Mix of uses and occupier representation

4.39 Sydenham has 169 retail and service units (source: Lichfields' land use survey 2021) and is the third largest in the Borough in terms of units. The diversity of uses within Sydenham is set out in Table 4.9 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

4.40 Like other district centres in the Borough, Sydenham has a relatively low provision of comparison goods outlets. There is a strong provision of convenience goods outlets and non-retail services e.g., estate agents. There were 20 vacant retail units in Sydenham in July 2021, a vacancy rate of 11.8%, which is much higher than the London average in 2017, but lower than the UK average in 2020.

Table 4.9 - Mix of shop and service uses – Sydenham

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	36	21.3	37.7	29.7
Convenience goods retail	24	14.2	12.8	9.1
Financial/professional services	18	10.7	) 14.7	9.3
Other non-retail services	42	24.9	)	16.5
Restaurants/cafés	15	8.9	14.9	9.9
Pubs/bars	4	2.4	3.8	4.8
Hot food takeaways	10	5.9	7.4	6.1
Vacant	20	11.8	8.6	14.6
Total	**169**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

New London Plan indicators

4.41 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Sydenham's designations are:

- Network classification: District centre
- Night-time classification: n/a
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.42 Sydenham has a reasonably large number of outlets (169 units) but its linear structure does not provide a compact natural circuit for pedestrians. The centre appears to be trading healthily and is vital and viable. The vacancy rate (11.8%) is the second lowest within the 9 main centres, but vacant units appear to be concentrated at the east and west peripheral areas. It is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification.

Forest Hill District centre

4.43 Forest Hill is in the south west of the Borough just to the north of Sydenham and west of Catford. It is identified as a District Centre in the London Plan. The key roles of Forest Hill include:

- convenience shopping convenience stores operated by Sainsbury's and Co-op, supported by a small selection of independent specialist food shops;
- comparison shopping: a good range comparison goods shops including a small number of multiple outlets;
- services: a reasonable range of estate agents, cafés, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: a good choice of pubs/bars; and

- community facilities: places of worship, sports centre, health clubs and dental/medical surgeries.

4.44 Forest Hill is a relatively compact centre focused around the railway station and anchor by a large Sainsbury's store. However, commercial uses on Perry Vale are dissected from the main centre by the railway line. The main concentration of shops is along London Road and Dartmouth Road. Considerable residential development has recently been completed near the centre.

Mix of uses and occupier representation

4.45 Forest Hill has 146 retail and service units (source: Lichfields' land use survey 2021) and is the fourth largest in the Borough in terms of units. The diversity of uses within Forest Hill is set out in Table 4.10 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.10 - Mix of shop and service uses – Forest Hill

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	21	14.4	37.7	29.7
Convenience goods retail	12	8.2	12.8	9.1
Financial/professional services	21	14.4	) 14.7	9.3
Other non-retail services	32	21.9	)	16.5
Restaurants/cafés	25	17.1	14.9	9.9
Pubs/bars	6	4.1	3.8	4.8
Hot food takeaways	10	6.8	7.4	6.1
Vacant	19	13.0	8.6	14.6
Total	**146**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.46 Forest Hill has a very low provision of comparison goods outlets, significantly below the GLA and national averages. The centre has a strong provision of restaurant/cafés and other non-retail services. There were 19 vacant retail units in Forest Hill in July 2021, a vacancy rate of 13%, which is higher than the London average in 2017, but marginally lower than the UK average in 2020.

4.47 There is a small selection of multiple comparison retailers including Boots, Superdrug and WH Smiths.

New London Plan indicators

4.48 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Forest Hill's designations are:

- Network classification: District centre
- Night-time classification: n/a
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.49 Forest Hill has a reasonably large number of outlets (146 units). It is relatively compact but dissected by the railway line. It is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification. However, the centre appears to be trading healthily and is vital and viable. The vacancy rate (13%) is the third lowest within the 9 main centres.

Blackheath District centre

4.50 Blackheath is in the central area of the Borough just to the east of Lewisham town centre. It is identified as a District Centre in the London Plan. The key roles of Blackheath include:

- convenience shopping: small specialist convenience shops, but no large food stores;
- comparison shopping: a reasonable selection of comparison goods shops for a centre of its size, including some high quality multiple outlets;
- services: a reasonable range of high street national banks/building societies, cafés, restaurants, estate agents and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs/bars and Blackheath Halls; and
- community facilities: the Conservatoire, places of worship, hospital and Age Concern centre.

4.51 Blackheath is an attractive village centre. It is compact with many period buildings. It is served by Blackheath station.

Mix of uses and occupier representation

4.52 Blackheath has 121 retail and service units (source: Lichfields' land use survey 2021). The diversity of uses within the centre is set out in Table 4.11 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.11 - Mix of shop and service uses – Blackheath

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	38	31.4	37.7	29.7
Convenience goods retail	16	13.2	12.8	9.1
Financial/professional services	11	9.1	) 14.7	9.3
Other non-retail services	19	15.7	)	16.5
Restaurants/cafés	17	14.0	14.9	9.9
Pubs/bars	5	4.1	3.8	4.8
Hot food takeaways	2	1.7	7.4	6.1
Vacant	13	10.7	8.6	14.6
Total	**121**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.53 The proportion of comparison goods outlets in the centre is above the UK average and is the highest proportion in the Borough, just higher than Lewisham town centre. Blackheath has a good selection of independent specialist and good quality national multiples e.g., Jojo Maman Bebe, Jigsaw, Oliver Bonas, Ryman, Sweaty Betty and Fired Earth.

4.54 Blackheath has several small convenience shops but does not have a large food store suitable for main and bulk food shopping. The centre has a strong evening economy with a good choice of restaurants, cafés, pubs and bars. There were 13 vacant retail units within Blackheath in July

2021, a vacancy rate of 10.7%, which is lower than the UK average in 2020. It has the lowest vacancy rate in the Borough.

New London Plan indicators

4.55 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Blackheath's designations are:

- Network classification: District centre
- Night-time classification: NT3 (more than local significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: n/a
- Strategic area for regeneration: n/a

Summary

4.56 Blackheath is a healthy and attractive village centre. It has the lowest shop vacancy rate in the Borough. It has a strong evening economy and it also provides high quality specialist comparison shopping. It is identified as a centre with only low potential for commercial growth within the London Plan but unlike the other district centres in the Borough has a night-time classification of local significance. Its key weakness is the absence of a large food store suitable for main and bulk food shopping.

Lee Green District centre

4.57 Lee Green is in the central area of the Borough to the east of Lewisham town centre and south of Blackheath. It is identified as a District Centre in the London Plan. The key roles of Lee Green include:

- convenience shopping: a large Sainsbury's superstore, supported by a small selection of independent specialist food shops;
- comparison shopping: a limited number of independent retailers;
- services: a reasonable range of cafés, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment and evening economy: several pubs; and
- community facilities: places of worship and community centre.

4.58 Lee Green is sub-divided into two main areas, i.e., traditional shop frontages along Lee High Road/Lee Road and the Leegate Centre. The Leegate Centre is dated and rundown. It has been the subject of redevelopment proposals for several years and the occupancy rate has reduced. The large Sainsbury's superstore is an important anchor. The centre is dissected by a busy crossroad.

Mix of uses and occupier representation

4.59 Lee Green has only 80 retail and service units (source: Lichfields' land use survey 2021) and is the second smallest district centre in the Borough in terms of the number of units. The diversity of uses within the centre is set out in Table 4.12 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

4.60 As in all the Borough's district centres, Lee Green has a low provision of comparison goods outlets, but the Sainsbury's store has an element of comparison good sales. The centre has a strong provision of hot food takeaways and other non-retail services. There were 22 vacant retail units in July 2021, a very high vacancy rate of 27.5%, but most of the vacant units are concentrated in the Leegate Centre, probably due to the pending redevelopment proposals.

Table 4.12 - Mix of shop and service uses – Lee Green

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	15	18.8	37.7	29.7
Convenience goods retail	7	8.8	12.8	9.1
Financial/professional services	4	5.0	) 14.7	9.3
Other non-retail services	16	20.0	)	16.5
Restaurants/cafés	7	8.8	14.9	9.9
Pubs/bars	3	3.8	3.8	4.8
Hot food takeaways	6	7.5	7.4	6.1
Vacant	22	27.5	8.6	14.6
Total	**80**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

New London Plan indicators

4.61 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Lee Green's designations are:

- Network classification: District centre
- Night-time classification: n/a
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: n/a
- Strategic area for regeneration: n/a

Summary

4.62 The traditional shop frontages in Lee Green appear to be trading healthily and the vacancy rate is relatively low in these areas. However, the Leegate Centre has a high vacancy rate but there are proposals to comprehensively redevelopment the centre. Lee Green is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification. The Sainsbury's store is an important anchor but pedestrian movement around the centre is hindered by the busy crossroads. The long term vitality and viability of the centre will be significantly influence by the successful redevelopment of the Leegate Centre.

Downham District centre

4.63 Downham is in the south of the Borough and is identified as a District Centre in the London Plan. The key roles of Downham include:

- convenience shopping: small convenience stores operated by Iceland, Tesco, Costcutter and Premier, supported by a limited selection of independent specialist food shops;

- comparison shopping: a limited range of small independents and charity shops; and
- services: a small range of facilities including cafés, restaurants, takeaways, hairdressers/beauty parlours, betting shops, petrol station and dry cleaners.

4.64 Downham is a small compact district centre. The main concentration of retail facilities is focused along Bromley Road (A21).

Mix of uses and occupier representation

4.65 Downham has only 77 retail and service units (source: Lichfields' land use survey 2021) and is the smallest district centre in the Borough. The diversity of uses is set out in Table 4.13 and compared with the Goad Plan pre-Covid national average and the GLA Town Centre Data 2017 average for London.

Table 4.13 - Mix of shop and service uses – Downham

Type	Number units	% units	GLA London Average (2017)	UK Average 2020
Comparison goods retail	14	18.2	37.7	29.7
Convenience goods retail	15	19.5	12.8	9.1
Financial/professional services	1	1.3	) 14.7	9.3
Other non-retail services	21	27.3	)	16.5
Restaurants/cafés	6	7.8	14.9	9.9
Pubs/bars	0	0.0	3.8	4.8
Hot food takeaways	9	11.7	7.4	6.1
Vacant	11	14.3	8.6	14.6
Total	**77**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2021, GLA 2017 London Town Centre Data and Experian Goad Plan national average 2020.

4.66 Downham has a very low provision of comparison goods outlets but a strong provision of convenience goods outlets, takeaways and other non-retail services e.g., hairdressers and dry cleaners. The convenience goods stores are predominantly basket/top food and grocery shopping facilities rather than main/bulk food shopping. The centre has a small range and choice of independent comparison goods shops.

4.67 There were 11 vacant retail units within Downham in July 2021, a vacancy rate of 14.3%, marginally lower than the UK average in 2020. Vacant units are spread throughout the centre with no obvious concentrations.

New London Plan indicators

4.68 The New London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Downham's designations are:

- Network classification: District centre
- Night-time classification: n/a
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: n/a
- Strategic area for regeneration: Yes

Summary

4.69 Downham has a small number of outlets (77 units). It is relatively compact but dissected by the A21. It is identified as a centre with only low potential for commercial growth within the London Plan and is not recognised in terms of having a night-time classification. However, the centre appears to be trading satisfactorily and is vital and viable. The vacancy rate (14.3%) is comparable with the national average.

5.0 Review of policy options

5.1 This section reviews potential policy options for future development plan policy taking account of updated floorspace capacity projections and recent and proposed changes to the Use Classes Order (UCO) and permitted development rights (PDR).

5.2 The new Lewisham Local Plan (Regulation 18 Stage) – Main Issues and Preferred Approaches document was published for consultation in January 2021 and includes several draft policies relating to town centres and retail.

The NPPF and other key changes

5.3 The NPPF (July 2021) consolidates a series of proposals that have been made in the last few years. In relation to town centres, the NPPF does not change the overall aims of policy, although there are some important modifications. For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:

1. defining a network and hierarchy of centres, allowing then to grow and diversify;
2. defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
3. allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e., town centre, then edge-of-centre followed by accessible out-of-centre sites.

5.4 The 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 should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.

5.5 The importance of a mix of retail and other town centre activity has increased in recent years and 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.

5.6 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

5.7 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against the sequential and impact tests.

5.8 The sequential test in the NPPF 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. 87). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which 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. 88).

5.9 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

5.10 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights are proposed from August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

Accommodating growth and change

5.11 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections beyond 2035 may need to be considered allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.

5.12 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new development within Lewisham Borough over and above commitments. Tables 5.1 and 5.2 below summarise the floorspace requirements in the Borough up to 2035 and 2040 (cumulative).

Table 5.1 Summary of retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Location	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Lewisham Northern	-3,230	-576	-429	-4,235
Lewisham Central	6,002	-1,793	342	4,551
Lewisham Eastern	3,835	-1,167	517	3,185
Lewisham Southern	3,019	-62	342	3,299
Lewisham Western	1,015	-53	635	1,597
Total	**10,641**	**-3,651**	**1,407**	**8,397**

Table 5.2 Summary of retail and food/beverage floorspace requirements up to 2040 (sq.m gross)

Location	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Lewisham Northern	-2,675	-45	81	-2,639
Lewisham Central	6,866	1,020	1,079	8,965
Lewisham Eastern	4,116	-1,010	1,067	4,173
Lewisham Southern	3,352	170	426	3,948
Lewisham Western	1,230	277	870	2,377
Total	**12,889**	**412**	**3,523**	**16,824**

Source: Tables 14 in Appendix 2, 3 and 4.

5.13 Table 5.1 indicates, following the implementation of commitments, there is combined capacity for 8,397 sq.m gross of retail and food/beverage floorspace up to 2035, but there is more potential in some parts of the Borough. The over-supply in the northern neighbourhood of the Borough could be counter-balanced by the repurposing of retail space and/or the redevelopment of out-of-centre retail parks.

5.14 The floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. The floorspace projections in this report provide a starting point for the review of site-specific allocations and development management policies.

5.15 Draft Policy EC11 and the supporting text (paragraph 8.60) refer to the higher retail capacity projections from the Retail Capacity Study Update 2019. The updated comparison goods floorspace projections in this 2021 update are much lower than the previous forecasts in the 2019 update. The new Lewisham Local Plan should be amended to reflect the latest projections at least up to 2035.

5.16 The existing stock of premises could have a role to play in accommodating any projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.17 There are 239 vacant shop units within the Borough's main centres, an average vacancy rate of 15.1%, which is slightly above the Goad national average (14.6%). Based on an average of 100 sq.m gross per unit, the total amount of vacant floorspace could be around 24,000 sq.m gross. A modest reduction in the shop vacancy rate to 10% could accommodate the projected net increase in total retail and food/beverage floorspace at 2035 (8,397 sq.m gross).

5.18 These projections and shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage in the Borough up to 2035, if all current commitments are implemented. There is likely to be a shift from comparison goods retail space to convenience goods retail and to food/beverage uses, with vacant shop premises also converting to these uses.

5.19 The redevelopment of out of centre retail warehouse parks could significantly reduce the over-supply of comparison goods retail floorspace in the Borough at 2035. The comparison goods floorspace capacity projections up to 2035 suggest a negative floorspace requirement (-3,651 sq.m gross). This over-supply assumes all existing floorspace will be retained and commitments will be implemented. However, if comparison goods floorspace at retail warehouse parks is lost and not replaced then the projected floorspace over-supply at 2035 will reduce and there may even be a positive floorspace projection at 2035. Nevertheless, a significant expansion of comparison goods retailing within designated centres is unlikely, even if the potential redevelopment of retail warehouse parks results in a loss of existing comparison goods floorspace.

5.20 The recent changes to the Use Classes Order and permitted development rights, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict Lewisham Council's ability to control the mix of uses in the future.

5.21 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development in order to accommodate projected growth for the foreseeable future i.e., up to 2035. The priority in the short to medium term will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. However, the development of existing retail floorspace in town centres may need to be re-provided. Based on a reasonable reduction in vacancy rates, available floorspace could theoretically accommodate the need for all new town centre uses up to 2035.

The redevelopment of out of centre retail warehouse parks may assist in reducing the over-supply of retail floorspace, providing more potential for growth within designated centres.

5.22 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities. Redevelopment to provide modern units and facilities could make town centres more attractive to potential occupiers and visitors.

Hierarchy of centres

5.23 The analysis of the hierarchy of centres in Section 4 indicates the Borough has a well-established network of centres that currently serve their respective neighbourhoods. Lewisham town centre is the only centre with a truly borough-wide catchment area. The health of the main centres is reasonably strong, despite the difficult market conditions described in Section 2. The shop vacancy rate has increased but in most centres is below or comparable with the national average.

5.24 Continuing to identify the hierarchy of centres in the future development plans is important in terms of:

1. ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
2. directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
3. identifying a viable role and strategy for each centre.

5.25 In line with the objectives of draft Policies EC10 and EC11, the network of town centres and local centre should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

5.26 Lewisham town centre is the largest and dominant town centre in the Borough, consistent with its New London Plan designation as a Major Centre and potential to become a Metropolitan Centre. Catford and the seven designated district centres all continue to play an important role as a focal point in their respective neighbourhoods. It is appropriate to continue to differentiate these district centre from the smaller local centres and parades in the Borough, consistent with the London Plan.

5.27 No fundamental changes to the proposed hierarchy of centres as set out in draft Policy EC11 and Table 8.2 are recommended.

Impact and sequential tests

5.28 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold.

5.29 New Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. 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 impact threshold is 2,500 sq. m gross.

5.30 The 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.

5.31 The PPG acknowledges the need to consider the impact of proposals below the 2,500 sq.m 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.

5.32 The NPPF minimum threshold of 2,500 sq.m gross remains an inappropriate threshold for Lewisham Borough, because this scale of development would exceed the overall long-term retail/food beverage/leisure projections for most centres/areas in the Borough.

5.33 Vacancy rates have increased in Lewisham Borough and the cumulative impact of planned commitments has yet to be felt. The lower retail floorspace capacity projections and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.

5.34 Draft Policy EC12 has a lower impact threshold of 500 sq.m gross, which is broadly consistent with the Sunday trading limit (280 sq.m net). This impact threshold remains appropriate. Given the overlapping nature of catchment areas in Lewisham Borough, a consistent impact threshold should be applied across the authority area. Future policy should also indicate that impact assessments should be proportionate to the scale of development proposed.

5.35 Retail and leisure uses previously related to the old use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e., offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO.

5.36 Designated major, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

5.37 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

5.38 Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries.

5.39 The relatively low floorspace capacity projections and the higher number of vacant shop units (239) in centres suggest there is no need to extend the PSA or centre boundaries to accommodate future growth.

Controlling the mix of uses

5.40 Draft Policies EC14 and EC15 seek to protect retail uses previously categorised as Class A1 uses within designated centres. The PSA is expected to contain the main concentration of retail use. Draft Policy EC14 seeks to concentrate and protect retail uses within the PSA, whilst allowing a more flexible approach in the wider town centre area.

5.41 There are four broad policy approaches that could be considered for future policy, as follows:

1. strengthening draft Policies EC14 and EC15 to provide more control over the loss of retail and service uses. This would usually involve extending the PSA and/or increasing the restrictions on uses permitted;
2. retaining the existing approach to control the mix of uses as currently set out in draft Policies EC14 and EC15;
3. amend Policies EC14 and EC15 to allow a more flexible approach to enable more non-town centre uses. This would usually involve reducing the PSA and/or introducing more flexibility; or
4. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.

5.42 Considering current and likely future market trends, the updated (lower) retail floorspace capacity projections, and changes to the UCO and permitted development rights described earlier, Options 1 and 2 are unsound and unimplementable approaches for existing premises.

5.43 The UCO/PDR changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e., new Class E.

5.44 The introduction of restrictive shop frontage policies (Option 1) is now unenforceable due to the UCO/PDR changes. Furthermore, this approach could be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the updated comparison goods floorspace projections are much lower than previous projections. The continuation of the proposed Policy EC14 approach (Option 2) will also be undermined and hampered by the UCO/PDR changes. As a result of these recent changes, Options 3 and 4 now appear to be the most likely approaches in relation to existing premises.

5.45 Notwithstanding the ability to enforce Options 1 and 2, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations in town centres. Based on the existing mix of uses within centres, as outlined in Section 4, and the future floorspace capacity projections, it would be reasonable to require a minimum of 50% of ground floor floorspace in new developments should be occupied by retail uses i.e., Class E (a) in order to maintain an appropriate mix of uses and safeguard the vitality and viability of centres.

5.46 In relation to changes of use within existing premises and in line with Option 3, future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within the PSA. This could include some other main town centre uses not previously permitted at ground floor level e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages particularly in conservation areas. All other non-Class E uses at ground floor level could be controlled within the PSA or all the wider town centre, but again this would be undermined by PDR changes outside of conservation areas.

5.47 If Option 3 is adopted then the policy could apply to existing premises in the PSA only, still allowing significant flexibility in the wider town centre. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g., pubs/bars and takeaways). This approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

5.48 Separate policy criteria could be considered to control some Sui Generis uses such as betting shops, takeaways or payday loan shops. There is no evidence to suggest there is a proliferation of these uses in the Borough's centres at present, but the Council could consider introducing a maximum threshold for hot food takeaway uses, in line with the objectives of London Plan Policy E9 criterion D. Based on the existing mix of uses as outlined in Section 4 an appropriate maximum threshold for hot food takeaways in town centres could be 10% of units.

6.0 Retail Impact Assessment

6.1 The new spatial strategy for the Borough supports the designation of a new opportunity area at Lower Sydenham in the London Plan over the long term, linked with the Bakerloo Line Extension (BLE). The aim of the strategy is to unlock development potential and address inequalities and deprivation experienced locally in Lewisham's southern areas. As part of this, the new Local Plan has identified the regeneration of brownfield sites at Bell Green/Lower Sydenham to deliver housing, employment, community facilities and open space.

6.2 A new town centre is expected to be delivered in the long term to support the new mixed-use neighbourhood, which will involve the reconfiguration of the existing out-of-centre retail provision at Bell Green Retail Park. However, the new Local Plan indicates the new town centre at Bell Green/Lower Sydenham must not harm the viability and vitality of nearby town centres. This section assesses the potential impact of a new town centre.

6.3 The NPPF states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m).

6.4 Impact assessments should consider:

1. the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
2. the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).

6.5 The potential new town centre at Bell Green Retail Park will exceed the NPPF retail impact threshold 2,500 sq.m gross and any planning application for future development should include a comprehensive and up to date retail impact assessment. Alternatively, planning policy could specify what quantum and type of retail floorspace will be appropriate within the new town centre, removing the need for a retail impact assessment. Given that the potential new town centre is likely to be implemented in the long-term, projections are more uncertain and susceptible to change. It is difficult to establish the likely impact and implications for designated centres at this early stage. Future policy relating to a potential new town centre at Bell Green should require an up to date and thorough retail impact assessment to be provided in support of the planning application regardless of the initial findings of the impact assessment in this report.

Key Assumptions

6.6 The proposed new town centre will be delivered in the long term. Trade diversion and impact has been assessed at 2035, which is an appropriate (earliest) design year assuming the new town centre is not completed significantly before 2033, allowing for two years for the development to achieve full and settled trading patterns.

6.7 The new Local Plan identifies five allocated development sites in the Bell Green/Lower Sydenham with theoretical capacity for up to 3,500 dwellings. The resident population could be 7,700 people (assuming 2.2 people per dwelling).

6.8 This resident population would generate the following expenditure at 2035:

- convenience goods £16.36 million

- comparison goods £29.44 million
- food/beverage £14.58 million
- **Total** **£60.38 million**

6.9 Bell Green Retail Park already provides a large Sainsbury's superstore and a recently opened Aldi store. The convenience goods benchmark turnover of these two stores exceeds £72 million, as shown in Table 11 in Appendix 2. This benchmark turnover is significantly higher than the convenience goods expenditure likely to be generated by new residents if the area is redeveloped.

6.10 The Sainsbury's and Aldi food stores already provide an important role in meeting the food and grocery shopping needs of the Catford and southern neighbourhoods in the Borough. Given the relatively high global convenience goods capacity floorspace projections for the Borough (10,641 sq.m gross by 2035) there is a strong case for the Sainsbury's and Aldi stores to be re-provided or retained within future redevelopment at Bell Green, although the amount of non-food comparison goods floorspace within the Sainsbury store could be significantly reduced.

6.11 Clearly retaining these food stores will have no impact on nearby town centres, because there will be no increase in convenience goods turnover. Some provision of smaller supporting convenience goods shops could also be provided e.g., newsagent, baker, butcher and greengrocer to serve the new residential population. All the main centres in the Borough has a selection of small specialist convenience shops supporting the main food stores. Supporting small convenience goods shops at Bell Green are unlikely to exceed 1,000 sq.m gross and no discernible impact on nearby centres would be envisaged, because the additional convenience goods expenditure generated by new residents (£16.36 million) will more than offset trade diversion.

6.12 The retail capacity assessment indicates the comparison goods turnover of existing stores at Bell Green is £42.3 million, as shown in Table 5 in Appendix 3. This turnover is projected to increase to £62.35 million by 2035. The projected comparison goods turnover also exceeds comparison goods expenditure likely to be generated by new residents if the area is redeveloped. However, the redevelopment of Bell Green could have an impact on designated centres if:

- the turnover of the new town centre exceeds the projected turnover of the existing retail park; and/or
- the type of comparison goods retailing that replaces the existing retail park competes more directly with nearby centres.

6.13 At present retail stores at Bell Green Retail Park occupy around 24,000 sq.m gross, of which about 14,600 sq.m gross is occupied by Sainsbury's and Aldi. Collectively all stores at Bell Green provide around 11,000 sq.m net of comparison goods sales floorspace, of which about 2,900 sq.m net is provided within the Sainsbury's and Aldi food stores. The existing comparison goods turnover of existing retail stores is estimated to be £42.3 million in 2021, suggesting an average sales density of about £3,800 per sq.m net. Based on the amount of comparison goods sales in the Sainsbury's and Aldi stores and the company average sales densities, about half of Bell Green's existing comparison goods turnover can be attributed to these two food stores. The impact assessment assumes the Sainsbury's and Aldi stores will be retained or replaced, and therefore no increase or decrease in comparison goods turnover is assumed.

6.14 The demolition of comparison goods retail warehouses at Bell Green Retail Park will release £31.2 millions of expenditure at 2035 (half the projected turnover of Bell Green Retail Park at 2035). This released expenditure will help to offset trade diversion to the new town centre from existing designated centres.

6.15 The new Lewisham Local Plan (Regulation 18) estimates allocated development sites within the Bell Green area could accommodate about 30,000 sq.m gross of town centre uses floorspace, about 6,000 sq.m gross more than the retail floorspace currently accommodated at Bell Green.

6.16 Assuming the replacement of the Sainsbury's and Aldi stores (say 14,000 sq.m gross), the new town centre could include around 16,000 sq.m gross of new floorspace to accommodate other town centre uses. Assuming most (say 15,000 sq.m gross) of this new floorspace is occupied by comparison goods retailing then the turnover of the new town centre is estimated to be £107.1 million, assuming a net to gross ratio of 80% and a projected average sales density of £8,925 per sq.m net at 2035. The net increase in comparison goods turnover, allowing for the closure of the existing retail warehouses, would be £75.9 million i.e., £107.1 million minus the projected turnover of £31.2 million outlined above.

6.17 This £75.9 million uplift in comparison goods turnover is a worst case (high) figure because it is unlikely 15,000 sq.m gross will be occupied by comparison goods retailing, i.e., the new town centre should include food/beverage and other non-retail services. Allowance for these other uses, suggests around 10,000 sq.m gross is likely to be occupied by comparison goods retailing. This more likely (best case) scenario would lead to an up-lift in comparison goods turnover of £40.2 million, rather than the worst case £75.9 million.

6.18 Bell Green Retail Park currently provides a McDonalds drive thru and a Costa Coffee within the Next store. These outlets are likely to have a turnover of around £2 million. The food/beverage expenditure generated by the residential development is £14.58 million, which could support around 2,500 sq.m gross of food/beverage floorspace at 2035.

6.19 As a worst case, the impact assessment assumes up to 4,000 sq.m gross of the new floorspace will be occupied by food/beverage uses with a turnover of £23 million in 2035, based on a projected average sales density of £5,747 per sq.m gross. The net increase in food/beverage turnover, allowing for the closure of McDonalds and Costa, would be £21 million. The more likely (best case) net increase based on 2,500 sq.m gross would be £12.4 million.

6.20 To summarise, an appropriate indicative mix of retail and service uses within the new town centre at Bell Green could be as follows:

- main food stores (Sainsbury's/Aldi) 14,000 sq.m gross (incl. 30% ancillary comparison goods sales)
- small convenience shops 1,000 sq.m gross
- comparison goods shops 10,000 sq.m gross
- food/beverage 2,500 sq.m gross
- other non-retail services 2,500 sq.m gross
- **Total 30,000 sq.m gross**

6.21 The impact assessment examines the worst case scenario and this more likely indicative mix of uses as the best case level of impact.

Most affected centres and other destinations

6.22 A new town centre at Bell Green is expected to attract most (around two thirds) of its trade from residents living in the Catford/Sydenham Zone 7 i.e., the primary catchment area. The remaining trade (one third) will be attracted from the secondary catchment area, i.e. Zones 4 (Lewisham Central), 5 (Lee Green/Grove Park), 9 (Beckenham/South Norwood) and 10 (Forest Hill). Based on this trade draw, the designated centres and facilities most likely to be affected by the development are:

- Bromley Metropolitan Centre;
- Catford Major Centre;
- Lewisham Major Centre;
- Beckenham District;
- Downham District Centre;
- Forest Hill District Centre;
- Penge District Centre; and
- Sydenham District Centre.

Trade diversion and impact estimates

Base year 2021 trading patterns

6.23 The turnover of comparison goods facilities at 2021 is shown in Table 5 in the Appendix 3. The combined base year turnover for facilities in Lewisham Borough is £573.23 million. The figures are summarised in Table 2 (Column A) in Table 2 in Appendix 5.

6.24 The turnover of food/beverage facilities is shown in Table 5 in Appendix 4B. The combined turnover for facilities in Lewisham Borough is £327.93 million. The figures are summarised in Table 6 (Column A) in Appendix 5.

6.25 The base year turnover estimates provide a good benchmark for assessing the implications of trade diversion, recognising existing facilities should increase their own turnover in real terms.

Future trading patterns in 2035 - without Bell Green development

6.26 Projected future comparison goods turnovers at 2035 are shown in Table 9 in the Appendix 3. The combined turnover for facilities in Lewisham Borough is projected to increase from £573.23 million in 2021 to £899.38 in 2035 due to population and expenditure growth. The figures are summarised in Table 2 (Column B) in Appendix 2.

6.27 Projected future food/beverage turnover at 2035 are shown in Table 9 in the Appendix 4. The combined turnover for facilities in Lewisham Borough is projected to increase from £327.93 million in 2021 to £542.67 in 2035, again due to population and expenditure growth. The figures are summarised in Table 6 (Column B) in Appendix 2.

Future trading patterns in 2035 - with a new Bell Green town centre (worst case)

6.28 The expected pattern of trade draw of the potential new town centre at Bell Green and pattern of trade diverted from existing facilities are based on current trading patterns and judgements about the propensity of the development to compete with other comparison shopping and food/ beverage destinations.

6.29 For comparison goods the trading performance for each destination post-development in 2035 is shown in Table 1 in Appendix 5. The figures are summarised in Table 2 - Column D. The percentage impact on each destination is shown at Column E. The residual turnover of each destination at 2035 is compared with the 2021 base year turnover at Column F i.e., the percentage increase from 2021 to 2035, accounting for the worst case trade diversion to the new Bell Green town centre.

6.30 For food and beverage, the trading performance for each destination post-development in 2035 is shown in Table 5 in Appendix 5. The figures are summarised in Table 6 - Column D. The percentage impact on each destination is shown at Column E. The residual turnover of each destination at 2035 is compared with the 2021 base year turnover at Column F, accounting for the worst case trade diversion to the new Bell Green town centre.

Future trading patterns in 2035 - with a new Bell Green town centre (best case)

6.31 For comparison goods the trading performance for each destination post-development in 2035 is shown in Table 2 in Appendix 5. The figures are summarised in Table 4 - Column D. The percentage impact on each destination is shown at Column E. The residual turnover of each destination at 2035 is compared with the 2021 base year turnover at Column F, accounting for the best case trade diversion to the new Bell Green town centre.

6.32 For food and beverage, the trading performance for each destination post-development in 2035 is shown in Table 7 in Appendix 5. The figures are summarised in Table 8 - Column D. The percentage impact on each destination is shown at Column E. The residual turnover of each destination at 2035 is compared with the 2021 base year turnover at Column F i.e., accounting for the best case trade diversion to the new Bell Green town centre.

Impact on vitality and viability

6.33 The impact analysis indicates, taking account the turnover and trade draw of the proposed development, that all centres should continue to trade above the 2021 base year turnover levels (for both comparison and food/beverage). However, one would expect existing facilities to increase their sales densities in the future.

6.34 For the comparison goods sector, the worst case levels of impact vary from -0.2% to -13.4%. The best case levels of impact vary from -0.1% to -7.1%.

6.35 For food and beverage sector, the worst case levels impact vary from -0.1% to -8%. The best case levels of impact vary from -0.1% to -4.7%.

6.36 The most affected centres are Sydenham District Centre, Forest Hill District Centre and Catford Major Centre. The implications of trade diversion from these and other centres is outlined in more detail below.

Bromley Metropolitan Centre

6.37 Bromley is a large designated Metropolitan Centre. The Bromley Retail, Office Industry and Leisure Study (2012) indicated the centre had nearly 500 retail, service and leisure units occupying over 140,000 sq.m gross. The shop vacancy rate in 2012 was 8% compared with the national average of 11% at that time. The GLA's town centre health check data suggested a slightly higher vacancy rate of 10.8% in 2016, but still below the national average.

6.38 The base year 2021 comparison goods turnover of existing facilities in Bromley town centre is estimated to be £265.56 million. The food/beverage turnover is £63.15 million. Bromley's comparison goods turnover is projected to increase to £397.29 million by 2035. The food/beverage turnover will increase to £99.94 million.

6.39 These turnover estimates relate to expenditure attracted from the Lewisham study area only. Bromley's catchment area extends further to the south and east. The centre will draw additional trade from areas outside the Lewisham study area and therefore these estimates significantly under-state the turnover of Bromley.

6.40 The worst case impact assessment suggests a new town centre at Bell Green will divert up to £14.36 million of comparison goods trade (-3.6% impact) and £1.49 million of food/beverage trade (-1.5% impact) form Bromley. As indicated above, these percentage impact figures are based on Bromley's turnover derived from the Lewisham study only. The actual reduction in total turnover will be much lower than -3.6% and -1.5% respectively.

6.41 Notwithstanding the over-stated impact percentages, Bromley's worst case residual comparison goods turnover at 2035 (£382.93 million) is 44.2% higher than the 2021 base year turnover (£265.56 million), which suggests the worst case trade diversion to Bell Green will be more than offset by future expenditure growth. These figures indicate existing comparison goods facilities in Bromley can still achieve an average 2.6% per annum growth in turnover between 2021 to 2035. Experian's recommended long-term growth projection for comparison goods retail sales densities is between 2.6% to 3% per annum. The worst case projections suggest there should be enough residual expenditure growth to allow existing retail facilities to increase their turnover to maintain Bromley's vitality and viability.

6.42 The worst case residual food/beverage turnover at 2035 (£98.45 million) is 55.9% higher than the 2021 base year turnover (£63.15 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Bromley can still achieve a 3.2% per annum growth in turnover between 2021 to 2035.

6.43 No significant adverse impact is envisaged on the comparison goods or food/beverage sectors in Bromley town centre based on the worst case impact assessment.

Lewisham Major Centre

6.44 Lewisham is a designated Major Centre and the Borough's largest centre, which is under-going significant development and regeneration. The centre appears to be trading healthily and is vital and viable, although the shop vacancy is relatively high for a centre of its size and importance.

6.45 The base year 2021 comparison goods turnover of existing facilities in Lewisham town centre is estimated to be £474.95 million, projected to increase to £397.29 million by 2035. The food/beverage turnover is £42.4 million, projected to increase to £64.88 million in 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £12.92 million of comparison goods trade (-2.7% impact) and £0.16 million of food/beverage trade (-0.3% impact) in 2035.

6.46 Lewisham town centre's worst case residual comparison goods turnover at 2035 (£462.03 million) is 46.6% higher than the 2021 base year turnover (£315.16 million), which suggests the worst case trade diversion to Bell Green will be more than offset by future expenditure growth. These figures indicate existing comparison goods facilities in Lewisham town centre can still achieve a 2.8% per annum growth in turnover between 2021 to 2035, which is within the range recommended by Experian (2.6% to 3%). The worst case projections suggest there should be enough residual expenditure growth to allow existing retail facilities to increase their turnover and support development commitments to maintain Lewisham's vitality and viability.

6.47 The worst case residual food/beverage turnover at 2035 (£64.71 million) is 52.6% higher than the 2021 base year turnover (£42.4 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Lewisham can still achieve a 3.1% per annum growth in turnover density between 2021 to 2035.

6.48 No significant adverse impact is envisaged on the comparison goods or food/beverage sectors within Lewisham town centre based on the worst case assessment.

Catford Major Centre

6.49 Catford is a designated Major Centre and the Borough's second largest centre. The centre appears to be trading satisfactorily and is vital and viable, although the shop vacancy is relatively high for a centre of its size and importance. In addition, the London Plan identifies on low potential for commercial growth.

6.50 The base year 2021 comparison goods turnover of existing facilities in Catford town centre is estimated to be £39.95 million, projected to increase to £59.41 million by 2035. The food/beverage turnover is £12.64 million, projected to increase to £19.64 million. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £4.9 million of comparison goods trade (-8.2% impact) and £0.75 million of food/beverage trade (-3.8% impact). These percentage levels of impact are the third highest in the Borough behind Sydenham and Forest Hill.

6.51 Catford town centre's worst case residual comparison goods turnover at 2035 (£54.51 million) is 36.5% higher than the 2021 base year turnover (£39.95 million). These figures indicate existing comparison goods facilities in Catford town centre would achieve only an average of 2.2% per annum growth in turnover density between 2021 to 2035, which is just below the range recommended by Experian (2.6% to 3%).

6.52 The best case impact assessment predicts a -4.4% reduction in comparison goods turnover at 2035, which would leave residual expenditure growth for an average 2.5% growth in turnover density, closer to the range recommended by Experian. No significant adverse impact is envisaged on the comparison goods sector within Catford town centre based on the best case assessment, but the worst case assessment is more finely balanced.

6.53 The worst case residual food/beverage turnover at 2035 (£18.89 million) is 49.4% higher than the 2021 base year turnover (£12.64 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Catford can still achieve a satisfactory average per annum growth in turnover between 2021 to 2035. No significant adverse impact is envisaged on the food/beverage sector within Catford based on the worst case assessment.

Beckenham District Centre

6.54 Beckenham is a designated District Centre. The Bromley Retail, Office Industry and Leisure Study (2012) indicated the centre had 229 retail, service and leisure units occupying over 42,000 sq.m gross. The shop vacancy rate in 2012 was 8% compared with the national average of 11% at that time. The GLA's town centre health check data suggested a lower vacancy rate of 5.9% in 2016.

6.55 The base year 2021 comparison goods turnover of existing facilities in Beckenham is estimated to be £29.25 million, projected to increase to £41.95 million by 2035. The food/beverage turnover is £54.65 million, projected to increase to £80.74 million by 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £1 million of comparison goods trade (-2.4% impact) and £2.18 million of food/beverage trade (-2.7% impact).

6.56 Beckenham's worst case residual comparison goods turnover at 2035 (£40.95 million) is 40% higher than the 2021 base year turnover (£29.25 million). These figures indicate existing comparison goods facilities in Beckenham town centre would achieve only an average of 2.4% per annum growth in turnover density between 2021 to 2035, which is just below the range recommended by Experian (2.6% to 3%).

6.57 The best case impact assessment predicts a -1.3% reduction in comparison goods turnover at 2035, which would leave residual expenditure growth for an average 2.5% growth in turnover density, closer to the range recommended by Experian. No significant adverse impact is envisaged on the comparison goods sector within Beckenham based on the best case assessment, but as in Catford, the worst case assessment is more finely balanced.

6.58 The worst case residual food/beverage turnover at 2035 (£78.56 million) is 43.9% higher than the 2021 base year turnover (£54.65 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. These figures indicate existing food beverage facilities in Beckenham can still achieve a 2.6% per annum growth in turnover between 2021 to 2035. No significant adverse impact is envisaged on the food/beverage sector within Beckenham based on the worst case assessment.

Downham District Centre

6.59 Downham is a small designated District Centre. It is identified as a centre with only low potential for commercial growth within the London Plan. However, the centre appears to be trading satisfactorily and is vital and viable. The vacancy rate (14.3%) is comparable with the national average.

6.60 The base year 2021 comparison goods turnover of existing facilities in Downham is estimated to be only £2.01 million projected to increase to £3.12 million by 2035, reflecting the centre's limited comparison goods shopping role. The food/beverage turnover is £0.68 million projected to increase to £0.97 million in 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £0.3 million of comparison goods trade (-1.1% impact) and £0.01 million of food/beverage trade (-0.7% impact) from Downham in 2035.

6.61 Downham's worst case residual comparison goods turnover at 2035 (£3.09 million) is 53.6% higher than the 2021 base year turnover (£2.01 million), which suggests the worst case trade diversion to Bell Green will be more than offset by future expenditure growth. These figures indicate existing comparison goods facilities in Downham can still achieve a 3.1% per annum growth in turnover between 2021 to 2035, which is above the range recommended by Experian (2.6% to 3%). The worst case projections suggest there should be enough residual expenditure growth to allow existing retail facilities to increase their turnover to maintain Downham's vitality and viability.

6.62 The worst case residual food/beverage turnover at 2035 (£0.96 million) is 41.4% higher than the 2021 base year turnover (£0.68 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Downham can still achieve a 2.5% per annum growth in turnover density between 2021 to 2035.

6.63 No significant adverse impact is envisaged on the comparison goods or food/beverage sector within Downham based on the worst case assessment.

Forest Hill District Centre

6.64 Forest Hill has a reasonably large number of outlets (146 units). It is identified as a centre with only low potential for commercial growth but still appears to be trading healthily. The vacancy rate (13%) is the third lowest within the 9 main centres.

6.65 The base year 2021 comparison goods turnover of existing facilities in Forest Hill is estimated to be £27.2 million projected to increase to £39.87 million by 2035. The food/beverage turnover is £39.52 million projected to increase to £59.2 million by 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £4.42 million of comparison goods trade (-11.1% impact) and £2.81 million of food/beverage trade (-4.7% impact). These percentage levels of impact are the second highest in the Borough behind Sydenham.

6.66 Forest Hill's worst case residual comparison goods turnover at 2035 (£35.45 million) is 30.3% higher than the 2021 base year turnover (£27.2 million), but these figures indicate existing comparison goods facilities in Forest Hill would achieve only an average of 1.9% per annum growth in turnover density between 2021 to 2035, which is significantly below the range recommended by Experian (2.6% to 3%).

6.67 The best case impact assessment predicts a -5.9% reduction in comparison goods turnover at 2035, which would leave residual expenditure growth for an average 2.3% growth in turnover density, much closer to the range recommended by Experian. No significant adverse impact is envisaged on the comparison goods sector within Forest Hill based on the best case assessment, but the worst case impact assessment raises more concerns.

6.68 The worst case residual food/beverage turnover at 2035 (£56.4 million) is 42.7% higher than the 2021 base year turnover (£39.52 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Forest Hill can still achieve a 2.6% per annum growth in turnover density between 2021 to 2035. No significant adverse impact is envisaged on the food/beverage sector within Forest Hill based on the worst case assessment.

Penge District Centre

6.69 Penge is a designated District Centre. The Bromley Retail, Office Industry and Leisure Study (2012) indicated the centre had 166 retail, service and leisure units occupying over 30,000 sq.m gross. The shop vacancy rate in 2012 was 11%, in line with the national average of 11% at that time. The GLA's town centre health check data suggested a similar vacancy rate of 11.3% in 2016.

6.70 The base year 2021 comparison goods turnover of existing facilities in Penge is estimated to be £36.32 million projected to increase to £52.25 million by 2035. The food/beverage turnover is £6.6 million, projected to increase to £9.67 million by 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £2.05 million of comparison goods trade (-3.6% impact) and £0.17 million of food/beverage trade (-1.7% impact).

6.71 Penge's worst case residual comparison goods turnover at 2035 (£50.21 million) is 38.2% higher than the 2021 base year turnover (£36.32 million). These figures indicate existing comparison goods facilities in Penge will achieve an average 2.3% per annum growth in turnover between 2021 to 2035, below the range recommended by Experian (2.6% to 3%).

6.72 The best case impact assessment predicts a -2.1% reduction in comparison goods turnover at 2035, which would leave residual expenditure growth for an average 2.5% growth in turnover density, closer to the range recommended by Experian. No significant adverse impact is envisaged on the comparison goods sector within Penge based on the best case assessment, but the worst case assessment raises more concerns.

6.73 The worst case residual food/beverage turnover at 2035 (£9.5 million) is 43.9% higher than the 2021 base year turnover (£6.6 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Penge can still achieve a 2.6% per annum growth in turnover density between 2021 to 2035. No significant adverse impact is envisaged on the food/beverage sector within Penge based on the worst case assessment.

Sydenham District Centre

6.74 Sydenham has a reasonably large number of outlets (169 units). The centre appears to be trading healthily and is vital and viable. The vacancy rate (11.8%) is the second lowest within the 9 main centres. It is identified as a centre with only low potential for commercial growth within the London Plan.

6.75 The base year 2021 comparison goods turnover of existing facilities in Sydenham is estimated to be £35.78 million, projected to increase to £53.45 million by 2035. The food/beverage turnover is £22.12 million, projected to increase to £33.92 million by 2035. The worst case impact assessment suggests a new town centre at Bell Green will divert up to £7.14 million of comparison goods trade (-13.4% impact) and £2.73 million of food/beverage trade (-8% impact). These percentage levels of impact are the highest in the Borough.

6.76 Sydenham's worst case residual comparison goods turnover at 2035 (£46.3 million) is 29.4% higher than the 2021 base year turnover (£35.78 million). These figures indicate existing comparison goods facilities in Sydenham would achieve only an average of 1.9% per annum growth in turnover density between 2021 to 2035, which is significantly below the range recommended by Experian (2.6% to 3%).

6.77 The best case impact assessment predicts a -7.1% reduction in comparison goods turnover at 2035, which would leave residual expenditure growth for an average 2.4% growth in turnover density, much closer to the range recommended by Experian. No significant adverse impact is envisaged on the comparison goods sector within Sydenham based on the best case assessment, but the worst case assessment raises more concerns.

6.78 The worst case residual food/beverage turnover at 2035 (£31.19 million) is 41% higher than the 2021 base year turnover (£22.12 million), which suggests the worst case trade diversion to Bell Green will again be offset by future expenditure growth. The figures indicate existing food beverage facilities in Bell Green can still achieve a 2.5% per annum growth in turnover density between 2021 to 2035. No significant adverse impact is envisaged on the food/beverage sector within Sydenham based on the worst case assessment.

Summary

6.79 The impact analysis set out in the Appendix 5 and summarised in this Section, consider the extent to which the forecast turnover of a potential new town centre at Bell Green will impact upon the vitality and viability of designated centres.

6.80 Impact is expected to be dispersed amongst many destinations, which reflects existing trading patterns. The predicted worst case level of trade diversion and impact on all centres are expected to be offset by future population and expenditure growth. However, in the centres nearest Bell Green the level of residual comparison goods retail expenditure growth is insufficient to achieved average growth in turnover densities to a level within the range recommended by Experian. The worst case impact figures for comparison goods retail raises concerns in relation to trade diversion from Sydenham, Forest Hill, Catford, Beckenham and Penge. However, the best case impact assessment suggests more acceptable levels of trade diversion and impact. Nevertheless, these impact estimates are based on long term expenditure projections. The impact of a new town centre at Bell Green should be reassessed when a planning application is submitted.

7.0 Summary and recommendations

Accommodating growth and change

7.1 The emerging Local Plan should identify the scale of need for main town centre uses and should allocate a range of suitable sites to meet this need for at least 10 years, in this case up to 2035. The capacity for new development within Lewisham Borough up to 2035 (over and above commitments) is summarised in Table 7.1.

Table 7.1 Summary of retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Location	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Lewisham Northern	-3,230	-576	-429	-4,235
Lewisham Central	6,002	-1,793	342	4,551
Lewisham Eastern	3,835	-1,167	517	3,185
Lewisham Southern	3,019	-62	342	3,299
Lewisham Western	1,015	-53	635	1,597
Total	**10,641**	**-3,651**	**1,407**	**8,397**

Source: Tables 14 in Appendix 2, 3 and 4.

7.2 There projections indicate an over-supply of floorspace in the northern neighbourhood of the Borough due to the implementation of commitments. These floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. Draft Policy EC11 and the supporting text should be amended to reflect the floorspace projections in Table 7.1.

7.3 Allowing for a reasonable reduction in vacant shop units, the floorspace projections to 2035 suggest there is no quantitative need to increase the combined amount of retail and food/beverage in the Borough if all current commitments are implemented.

7.4 The floorspace capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development in order to accommodate projected growth. The priority up to 2035 should be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. However, the development of existing retail floorspace in town centres may need to be re-provided. The redevelopment of out of centre retail warehouse parks may assist in reducing the over-supply of retail floorspace, providing more potential for growth within designated centres.

7.5 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities. Redevelopment to provide modern units and facilities could make town centres more attractive to potential occupiers and visitors.

Hierarchy of centres

7.6 In line with the objectives of draft Policies EC10 and EC11, the network of town centres and local centre should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. No changes to the proposed hierarchy of centres as set out in draft Policy EC11 and Table 8.2 are recommended.

Impact and sequential tests

7.7 New Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross remains an inappropriate threshold for Lewisham Borough, because this scale of development would exceed the overall long-term retail/food beverage/leisure projections for most centres/areas in the Borough.

7.8 Draft Policy EC12 has a lower impact threshold of 500 sq.m gross, which is broadly consistent with the Sunday trading limit (280 sq.m net). This impact threshold remains appropriate and a consistent impact threshold should be applied across the authority area. Future policy should also indicate that impact assessments should be proportionate to the scale of development proposed.

7.9 To avoid potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO.

7.10 Designated major, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development and the application of the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries. The relatively low floorspace capacity projections and the higher number of vacant shop units in centres suggest there is no need to extend the PSA or centre boundaries to accommodate future growth.

Controlling the mix of uses

7.11 Draft Policies EC14 and EC15 seek to protect retail uses previously categorised as Class A1 uses within designated centres. Recent changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

7.12 Future policy relating to existing ground floor premises in town centres should seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within the Primary Shopping Areas (PSA), which could include some other main town centre uses not previously permitted at ground floor level e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages particularly in conservation areas. All other non-Class E uses at ground floor level could be controlled within the PSA or all the wider town centre. This approach will allow significant flexibility in the wider town centre.

7.13 In certain cases, it may be appropriate to consider Article 4 directions in some centres to prevent permitted changes of use that could undermine the character or vitality and viability of some centres. However, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within town centres.

7.14 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in town centres. It would be reasonable to require a minimum of 50% of ground floor floorspace in new developments to be occupied by retail use i.e., Class E (a) in order to maintain an appropriate mix of uses and safeguard the vitality and viability of centres.

Bell Green/Lower Sydenham

7.15 The new spatial strategy for the Borough supports the designation of a new opportunity area at Lower Sydenham in the London Plan. The new Local Plan indicates a new town centre if implemented at Bell Green/Lower Sydenham must not harm the viability and vitality of nearby town centres. This potential new town centre is likely to be implemented in the long-term and it is difficult to establish the likely impact and implications for designated centres at this early stage. Future policy relating to a potential new town centre at Bell Green should require an up to date and thorough retail impact assessment to be provided in support of the planning application.

7.16 Notwithstanding the need for a retail impact assessment to support a future planning application, the preliminary impact assessment in this report considers the extent to which the forecast turnover of a potential new town centre at Bell Green will impact upon the vitality and viability of designated centres.

7.17 The new Lewisham Local Plan (Regulation 18) estimates allocated development sites within the Bell Green area could accommodate about 30,000 sq.m gross of town centre uses floorspace, about 6,000 sq.m gross more than the retail floorspace currently accommodated at Bell Green.

7.18 A realistic and appropriate indicative mix of retail and service uses within the new town centre at Bell Green could be as follows:

- main food stores (Sainsbury's/Aldi) 14,000 sq.m gross (incl. 30% ancillary comparison goods sales)
- small convenience shops 1,000 sq.m gross
- comparison goods shops 10,000 sq.m gross
- food/beverage 2,500 sq.m gross
- other non-retail services 2,500 sq.m gross
- **Total 30,000 sq.m gross**

7.19 The impact assessment in this report has examined a best case scenario, based on the indicative mix of uses shown above. The worst case scenario assumes the maximum level of comparison retail and food/beverage floorspace that could physically (if not realistically) be provided. The designated centres and facilities most likely to be affected by the development are:

- Bromley Metropolitan Centre;
- Catford Major Centre;
- Lewisham Major Centre;
- Beckenham District;
- Downham District Centre;
- Forest Hill District Centre;
- Penge District Centre; and
- Sydenham District Centre.

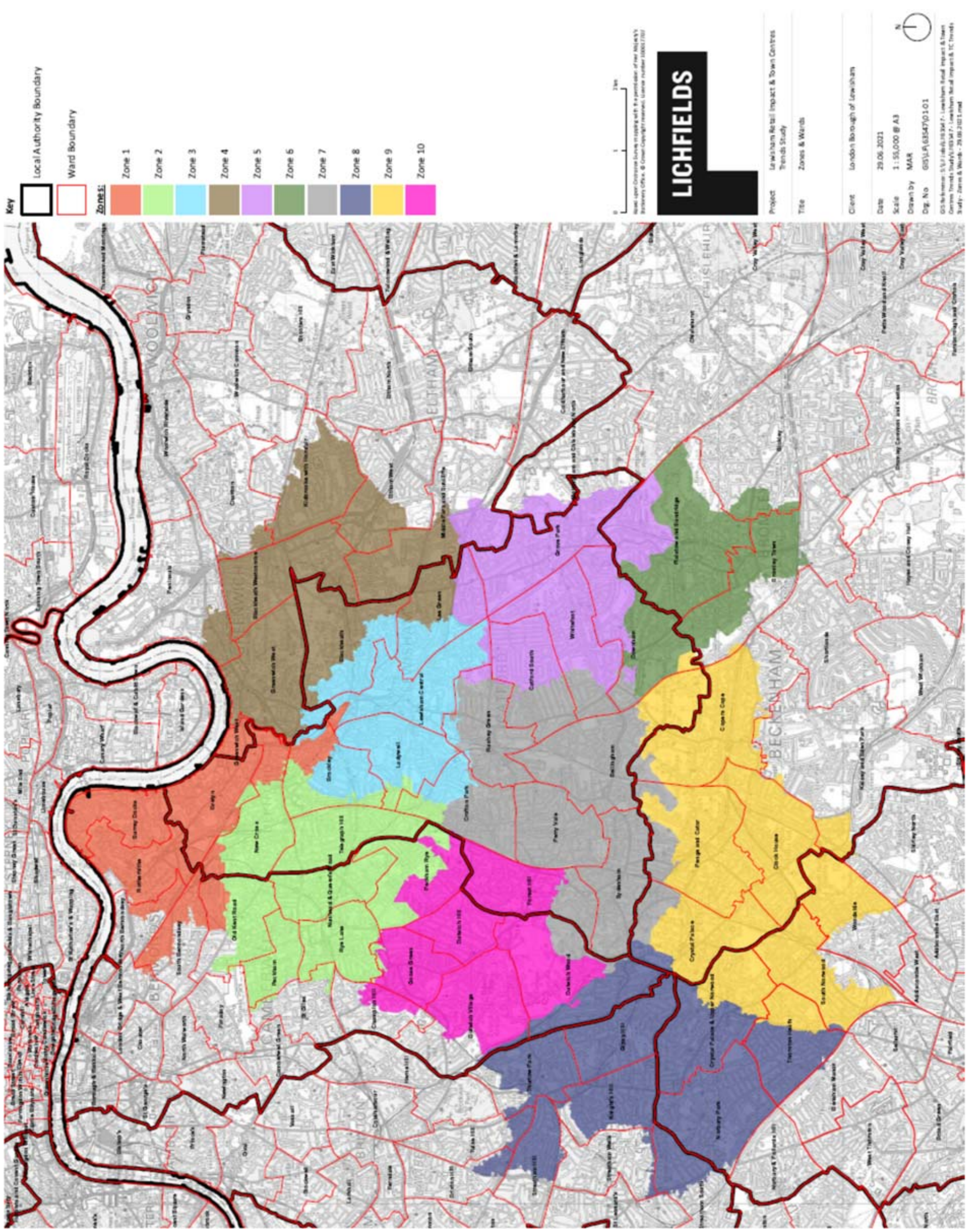
7.20 Impact is expected to be dispersed amongst many destinations, which reflects existing trading patterns. For the comparison goods sector, the worst case levels of impact vary from -0.2% to -

13.4%. The best case levels of impact vary from -0.1% to -7.1%. For food and beverage sector, the worst case levels impact vary from -0.1% to -8%. The best case levels of impact vary from -0.1% to -4.7%.

7.21 The predicted worst case level of trade diversion and impact on all centres are expected to be offset by future population and expenditure growth. However, in the nearest centres residual expenditure growth is insufficient to achieved average levels of growth in turnover densities. The worst case impact figures raises concerns in relation to trade diversion from Sydenham, Forest Hill, Catford, Beckenham and Penge. The best case impact assessment suggests more acceptable levels of trade diversion and impact.

7.22 The results of this preliminary impact assessment suggest the scale of any proposed new town centre should be capped in line with the indicative mix of uses outlined above. Furthermore, these impact estimates are based on long term projections that have inherent uncertainties. The impact of a new town centre at Bell Green should be reassessed when a planning application is submitted.

Appendix 1 Study area zones


Key
Local Authority Boundary
Ward Boundary
Zones:
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Zone 10
LICHFIELDS
Project Lewisham Retail Impact & Town Centres Trends Study
Title Zones & Wards
Client London Borough of Lewisham

Appendix 2 Convenience goods assessment

Table 1 - Study area population projections

Zone	2019	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	80,681	83,403	89,543	97,031	102,616	106,292
2 - New Cross/Southwark (east)	108,043	110,253	117,402	129,296	140,952	147,513
3 - Lewisham Central	64,838	64,021	67,006	69,199	70,706	73,164
4 - Blackheath/Greenwich (west)	68,256	67,710	67,642	67,039	67,401	68,526
5 - Lee Green/Grove Park	54,736	53,862	54,446	53,712	54,470	54,970
6 - Bromley/Downham	30,318	31,364	33,437	35,781	36,345	37,422
7 - Catford/Sydenham	93,370	92,853	92,622	95,168	100,143	101,678
8 - Crystal Palace/ West Norwood	95,126	95,334	95,526	96,850	99,352	101,962
9 - Beckenham/ South Norwood	91,862	91,685	91,668	92,268	93,744	96,198
10 - Forest Hill/Southwark (south)	44,925	45,381	45,372	45,574	46,150	47,414
Total	**732,155**	**735,865**	**754,664**	**781,918**	**811,880**	**835,139**

Sources:
Experian popluation for zones at 2019
GLA ward level population projections - 2019-based BPO Draft, Local Plan scenario 1 standard projection for LB of Lewisham.
GLA ward level population projections - housing led 2018 for areas outside LB Lewisham.

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	1,981	1,968	1,961	1,964	1,968
2 - New Cross/Southwark (east)	1,877	1,864	1,858	1,861	1,865
3 - Lewisham Central	2,241	2,227	2,219	2,223	2,227
4 - Blackheath/Greenwich (west)	2,410	2,395	2,387	2,391	2,395
5 - Lee Green/Grove Park	2,107	2,094	2,087	2,090	2,094
6 - Bromley/Downham	2,284	2,270	2,262	2,266	2,270
7 - Catford/Sydenham	2,162	2,148	2,141	2,145	2,149
8 - Crystal Palace/ West Norwood	2,136	2,123	2,115	2,119	2,123
9 - Beckenham/ South Norwood	2,295	2,280	2,272	2,276	2,280
10 - Forest Hill/Southwark (south)	2,364	2,349	2,341	2,345	2,349

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Breifing Note 18 (October 2020)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	165.18	176.19	190.28	201.59	209.17
2 - New Cross/Southwark (east)	206.90	218.89	240.25	262.37	275.07
3 - Lewisham Central	143.48	149.20	153.56	157.18	162.93
4 - Blackheath/Greenwich (west)	163.21	161.99	160.00	161.15	164.13
5 - Lee Green/Grove Park	113.51	114.00	112.08	113.87	115.11
6 - Bromley/Downham	71.65	75.89	80.94	82.36	84.95
7 - Catford/Sydenham	200.78	198.98	203.75	214.78	218.46
8 - Crystal Palace/ West Norwood	203.67	202.76	204.87	210.53	216.44
9 - Beckenham/ South Norwood	210.42	209.02	209.67	213.40	219.38
10 - Forest Hill/Southwark (south)	107.29	106.58	106.69	108.23	111.39
Total	**1,586.11**	**1,613.51**	**1,662.08**	**1,725.46**	**1,777.04**

Source: Tables 1 and 2

Table 4 - Base year 2021 convenience goods market shares by zone (%)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Asda, Deptford	0.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Deptford DC	7.1%	2.3%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Sainsbury's, New Cross	0.7%	10.5%	0.0%	1.3%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
Other New Cross DC	0.8%	5.5%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**9.1%**	**20.3%**	**0.0%**	**1.5%**	**0.0%**	**0.0%**	**0.7%**	**0.0%**	**0.0%**	**0.0%**
Lewisham Central										
Sainsbury's, Lewisham	3.4%	5.3%	3.1%	20.5%	4.6%	0.0%	6.0%	0.4%	0.0%	3.7%
Tesco, Lewisham	3.5%	3.1%	4.2%	18.7%	3.8%	0.9%	3.2%	0.0%	0.0%	0.3%
Other Lewisham TC	3.6%	3.6%	10.3%	17.8%	6.3%	0.2%	6.6%	0.1%	0.0%	4.4%
Aldi, Catford	0.0%	1.4%	0.0%	5.4%	4.6%	0.8%	2.4%	0.3%	0.0%	2.3%
Tesco, Catford	0.0%	0.3%	0.0%	1.3%	0.7%	0.9%	4.2%	0.0%	0.7%	0.0%
Other Catford DC	0.0%	0.1%	0.0%	3.0%	1.8%	3.8%	3.0%	0.1%	0.0%	0.1%
Sub-total	**10.5%**	**13.8%**	**17.6%**	**66.7%**	**21.8%**	**6.6%**	**25.4%**	**0.9%**	**0.7%**	**10.8%**
Lewisham Eastern										
Other Blackheath DC	0.0%	0.0%	2.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Lee Green	0.0%	0.0%	25.5%	10.0%	23.4%	0.3%	0.0%	1.0%	0.0%	0.5%
Other Lee Green DC	0.0%	0.0%	0.5%	0.0%	3.7%	0.0%	0.5%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**28.0%**	**10.2%**	**27.1%**	**0.3%**	**0.5%**	**1.0%**	**0.0%**	**0.5%**
Lewisham Southern										
M&S Downham	0.1%	0.0%	0.0%	0.0%	1.6%	7.7%	0.6%	0.2%	0.6%	0.7%
Other Downham DC	0.0%	0.0%	0.2%	0.0%	2.8%	4.9%	0.5%	0.0%	0.0%	0.0%
Lidl, Bellingham	0.0%	0.0%	0.0%	0.0%	2.1%	1.2%	2.2%	0.0%	0.1%	0.1%
Sainsbury's, Bell Green	0.0%	0.3%	0.0%	1.9%	4.4%	1.3%	36.2%	3.6%	3.3%	6.6%
Sub-total	**0.1%**	**0.3%**	**0.2%**	**1.9%**	**10.9%**	**15.1%**	**39.5%**	**3.8%**	**4.0%**	**7.4%**
Lewisham Western										
Lidl, Sydenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.2%	0.0%	1.8%
Other Sydenham DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%	0.8%
Sainsbury's, Forest Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	4.3%	2.7%	0.0%	27.0%
Other Forest Hill DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	2.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**17.3%**	**2.9%**	**0.0%**	**31.6%**
LB Lewisham total	**19.7%**	**34.4%**	**45.8%**	**80.3%**	**59.8%**	**22.2%**	**83.4%**	**8.6%**	**4.7%**	**50.3%**
Surrey Quays	43.3%	6.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Peckham	1.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	2.3%
Bermondsey	8.7%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
East Dulwich	0.0%	8.8%	0.0%	1.3%	0.0%	0.0%	0.0%	5.3%	0.0%	25.9%
Other in LB Southwark	2.9%	9.5%	0.2%	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.3%
Greenwich	0.8%	1.3%	3.1%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other in LB Greenwich	0.3%	0.2%	21.4%	1.7%	6.4%	0.0%	0.0%	0.7%	0.0%	0.0%
Bromley	0.0%	0.0%	1.4%	0.1%	1.5%	25.0%	0.0%	0.0%	3.1%	0.0%
Beckenham	0.0%	0.0%	0.0%	0.0%	4.7%	3.1%	3.0%	7.1%	17.3%	3.2%
Penge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.2%	15.7%	0.0%
Other in LB Bromley	0.0%	0.0%	0.5%	0.0%	2.9%	21.9%	0.7%	11.9%	29.2%	0.2%
Local centres in suvrey area	10.5%	13.4%	14.2%	10.9%	9.5%	26.0%	8.6%	17.3%	20.9%	11.8%
Other	12.8%	5.6%	13.4%	2.5%	15.2%	1.8%	1.5%	48.9%	8.5%	4.7%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Lewisham Retail Capacity Study 2019 and Lichfields' analysis.

Table 5 - Base year 2021 convenience goods expendiiture patterns by zone (£M)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2021	165.18	206.90	143.48	163.21	113.51	71.65	200.78	203.67	210.42	107.29	**1,586.11**
Lewisham Northern											
Asda, Deptford	0.83	4.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.96
Other Deptford DC	11.73	4.76	0.00	0.00	0.00	0.00	0.40	0.00	0.00	0.00	16.89
Sainsbury's, New Cross	1.16	21.72	0.00	2.12	0.00	0.00	1.00	0.00	0.00	0.00	26.01
Other New Cross DC	1.32	11.38	0.00	0.33	0.00	0.00	0.00	0.00	0.00	0.00	13.03
Sub-total	**15.03**	**42.00**	**0.00**	**2.45**	**0.00**	**0.00**	**1.41**	**0.00**	**0.00**	**0.00**	**60.89**
Lewisham Central											
Sainsbury's, Lewisham	5.62	10.97	4.45	33.46	5.22	0.00	12.05	0.81	0.00	3.97	76.54
Tesco, Lewisham	5.78	6.41	6.03	30.52	4.31	0.64	6.42	0.00	0.00	0.32	60.45
Other Lewisham TC	5.95	7.45	14.78	29.05	7.15	0.14	13.25	0.20	0.00	4.72	82.70
Aldi, Catford	0.00	2.90	0.00	8.81	5.22	0.57	4.82	0.61	0.00	2.47	25.40
Tesco, Catford	0.00	0.62	0.00	2.12	0.79	0.64	8.43	0.00	1.47	0.00	14.09
Other Catford DC	0.00	0.21	0.00	4.90	2.04	2.72	6.02	0.20	0.00	0.11	16.20
Sub-total	**17.34**	**28.55**	**25.25**	**108.86**	**24.75**	**4.73**	**51.00**	**1.83**	**1.47**	**11.59**	**275.38**
Lewisham Eastern											
Other Blackheath DC	0.00	0.00	2.87	0.33	0.00	0.00	0.00	0.00	0.00	0.00	3.20
Sainsbury's, Lee Green	0.00	0.00	36.59	16.32	26.56	0.21	0.00	2.04	0.00	0.54	82.26
Other Lee Green DC	0.00	0.00	0.72	0.00	4.20	0.00	1.00	0.00	0.00	0.00	5.92
Sub-total	**0.00**	**0.00**	**40.18**	**16.65**	**30.76**	**0.21**	**1.00**	**2.04**	**0.00**	**0.54**	**91.38**
Lewisham Southern											
M&S Downham	0.17	0.00	0.00	0.00	1.82	5.52	1.20	0.41	1.26	0.75	11.12
Other Downham DC	0.00	0.00	0.29	0.00	3.18	3.51	1.00	0.00	0.00	0.00	7.98
Lidl, Bellingham	0.00	0.00	0.00	0.00	2.38	0.86	4.42	0.00	0.21	0.11	7.98
Sainsbury's, Bell Green	0.00	0.62	0.00	3.10	4.99	0.93	72.68	7.33	6.94	7.08	103.69
Sub-total	**0.17**	**0.62**	**0.29**	**3.10**	**12.37**	**10.82**	**79.31**	**7.74**	**8.42**	**7.94**	**130.77**
Lewisham Western											
Lidl, Sydenham	0.00	0.00	0.00	0.00	0.00	0.00	9.24	0.41	0.00	1.93	11.57
Other Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	12.45	0.00	0.00	0.86	13.31
Sainsbury's, Forest Hill	0.00	0.00	0.00	0.00	0.00	0.14	8.63	5.50	0.00	28.97	43.25
Other Forest Hill DC	0.00	0.00	0.00	0.00	0.00	0.00	4.42	0.00	0.00	2.15	6.56
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.14**	**34.73**	**5.91**	**0.00**	**33.91**	**74.69**
LB Lewisham total	**32.54**	**71.18**	**65.71**	**131.06**	**67.88**	**15.91**	**167.45**	**17.52**	**9.89**	**53.97**	**633.10**
Surrey Quays	71.52	13.66	0.00	2.12	0.00	0.00	0.00	0.00	1.26	0.43	88.99
Peckham	1.65	23.38	0.00	0.00	0.00	0.00	1.41	0.00	0.00	2.47	28.91
Bermondsey	14.37	18.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.97	33.75
East Dulwich	0.00	18.21	0.00	2.12	0.00	0.00	0.00	10.79	0.00	27.79	58.91
Other in LB Southwark	4.79	19.66	0.29	0.16	0.00	0.00	1.41	0.00	0.00	0.32	26.62
Greenwich	1.32	2.69	4.45	2.94	0.00	0.00	0.00	0.00	0.00	0.00	11.40
Other in LB Greenwich	0.50	0.41	30.71	2.77	7.26	0.00	0.00	1.43	0.00	0.00	43.08
Bromley	0.00	0.00	2.01	0.16	1.70	17.91	0.00	0.00	6.52	0.00	28.31
Beckenham	0.00	0.00	0.00	0.00	5.34	2.22	6.02	14.46	36.40	3.43	67.88
Penge	0.00	0.00	0.00	0.00	0.00	0.00	2.81	0.41	33.04	0.00	36.25
Other in LB Bromley	0.00	0.00	0.72	0.00	3.29	15.69	1.41	24.24	61.44	0.21	107.00
Local centres in suvrey area	17.34	27.73	20.37	17.79	10.78	18.63	17.27	35.23	43.98	12.66	221.79
Other	21.14	11.59	19.23	4.08	17.25	1.29	3.01	99.59	17.89	5.04	200.11
TOTAL	**165.18**	**206.90**	**143.48**	**163.21**	**113.51**	**71.65**	**200.78**	**203.67**	**210.42**	**107.29**	**1,586.11**

Source: Tables 3 and 4

Table 6 - Future convenience goods market shares by zone (%)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Asda, Deptford	0.4%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Deptford DC	6.8%	2.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Sainsbury's, New Cross	0.5%	10.3%	0.0%	1.3%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
Other New Cross DC	0.7%	5.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out-of-centre commitments	10.0%	5.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**18.4%**	**24.7%**	**1.0%**	**1.5%**	**0.0%**	**0.0%**	**0.7%**	**0.0%**	**0.0%**	**0.0%**
Lewisham Central										
Sainsbury's, Lewisham	3.3%	5.0%	3.1%	20.5%	4.6%	0.0%	6.0%	0.4%	0.0%	3.7%
Tesco, Lewisham	3.4%	3.0%	4.2%	18.7%	3.8%	0.9%	3.2%	0.0%	0.0%	0.3%
Other Lewisham TC	3.5%	3.5%	10.3%	17.8%	6.3%	0.2%	6.6%	0.1%	0.0%	4.4%
Aldi, Catford	0.0%	1.3%	0.0%	5.4%	4.6%	0.8%	2.4%	0.3%	0.0%	2.3%
Tesco, Catford	0.0%	0.3%	0.0%	1.3%	0.7%	0.9%	4.2%	0.0%	0.7%	0.0%
Other Catford DC	0.0%	0.1%	0.0%	3.0%	1.8%	3.8%	3.0%	0.1%	0.0%	0.1%
Sub-total	**10.2%**	**13.2%**	**17.6%**	**66.7%**	**21.8%**	**6.6%**	**25.4%**	**0.9%**	**0.7%**	**10.8%**
Lewisham Eastern										
Other Blackheath DC	0.0%	0.0%	2.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Lee Green	0.0%	0.0%	25.5%	10.0%	23.4%	0.3%	0.0%	1.0%	0.0%	0.5%
Other Lee Green DC	0.0%	0.0%	0.5%	0.0%	3.7%	0.0%	0.5%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**28.0%**	**10.2%**	**27.1%**	**0.3%**	**0.5%**	**1.0%**	**0.0%**	**0.5%**
Lewisham Southern										
M&S Downham	0.1%	0.0%	0.0%	0.0%	1.6%	7.7%	0.6%	0.2%	0.6%	0.7%
Other Downham DC	0.0%	0.0%	0.2%	0.0%	2.8%	4.9%	0.5%	0.0%	0.0%	0.0%
Lidl, Bellingham	0.0%	0.0%	0.0%	0.0%	2.1%	1.2%	2.2%	0.0%	0.1%	0.1%
Sainsbury's, Bell Green	0.0%	0.3%	0.0%	1.9%	4.4%	1.3%	36.2%	3.6%	3.3%	6.6%
Sub-total	**0.1%**	**0.3%**	**0.2%**	**1.9%**	**10.9%**	**15.1%**	**39.5%**	**3.8%**	**4.0%**	**7.4%**
Lewisham Western										
Lidl, Sydenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.2%	0.0%	1.8%
Other Sydenham DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%	0.8%
Sainsbury's, Forest Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	4.3%	2.7%	0.0%	27.0%
Other Forest Hill DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	2.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**17.3%**	**2.9%**	**0.0%**	**31.6%**
LB Lewisham total	**28.7%**	**38.2%**	**46.8%**	**80.3%**	**59.8%**	**22.2%**	**83.4%**	**8.6%**	**4.7%**	**50.3%**
Surrey Quays	37.5%	6.1%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Peckham	0.9%	11.1%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	2.3%
Bermondsey	8.0%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
East Dulwich	0.0%	8.6%	0.0%	1.3%	0.0%	0.0%	0.0%	5.3%	0.0%	25.9%
Other in LB Southwark	2.8%	9.0%	0.2%	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.3%
Greenwich	0.7%	1.2%	3.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other in LB Greenwich	0.3%	0.2%	20.5%	1.7%	6.4%	0.0%	0.0%	0.7%	0.0%	0.0%
Bromley	0.0%	0.0%	1.4%	0.1%	1.5%	25.0%	0.0%	0.0%	3.1%	0.0%
Beckenham	0.0%	0.0%	0.0%	0.0%	4.7%	3.1%	3.0%	7.1%	17.3%	3.2%
Penge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.2%	15.7%	0.0%
Other in LB Bromley	0.0%	0.0%	0.5%	0.0%	2.9%	21.9%	0.7%	11.9%	29.2%	0.2%
Local centres in suvrey area	10.3%	13.4%	14.2%	10.9%	9.5%	26.0%	8.6%	17.3%	20.9%	11.8%
Other	10.8%	3.7%	13.4%	2.5%	15.2%	1.8%	1.5%	48.9%	8.5%	4.7%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Lewisham Retail Capacity Study 2019 and Lichfields' analysis.

Table 7 - Future 2025 convenience goods expendiiture patterns by zone (£M)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2025	176.19	218.89	149.20	161.99	114.00	75.89	198.98	202.76	209.02	106.58	**1,613.51**
Lewisham Northern											
Asda, Deptford	0.70	4.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.86
Other Deptford DC	11.98	4.82	0.00	0.00	0.00	0.00	0.40	0.00	0.00	0.00	17.19
Sainsbury's, New Cross	0.88	22.55	0.00	2.11	0.00	0.00	0.99	0.00	0.00	0.00	26.53
Other New Cross DC	1.23	11.60	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	13.16
Out-of-centre commitments	17.62	10.94	1.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.06
Sub-total	**32.42**	**54.07**	**1.49**	**2.43**	**0.00**	**0.00**	**1.39**	**0.00**	**0.00**	**0.00**	**91.80**
Lewisham Central											
Sainsbury's, Lewisham	5.81	10.94	4.63	33.21	5.24	0.00	11.94	0.81	0.00	3.94	76.53
Tesco, Lewisham	5.99	6.57	6.27	30.29	4.33	0.68	6.37	0.00	0.00	0.32	60.82
Other Lewisham TC	6.17	7.66	15.37	28.83	7.18	0.15	13.13	0.20	0.00	4.69	83.39
Aldi, Catford	0.00	2.85	0.00	8.75	5.24	0.61	4.78	0.61	0.00	2.45	25.28
Tesco, Catford	0.00	0.66	0.00	2.11	0.80	0.68	8.36	0.00	1.46	0.00	14.06
Other Catford DC	0.00	0.22	0.00	4.86	2.05	2.88	5.97	0.20	0.00	0.11	16.29
Sub-total	**17.97**	**28.89**	**26.26**	**108.05**	**24.85**	**5.01**	**50.54**	**1.82**	**1.46**	**11.51**	**276.38**
Lewisham Eastern											
Other Blackheath DC	0.00	0.00	2.98	0.32	0.00	0.00	0.00	0.00	0.00	0.00	3.31
Sainsbury's, Lee Green	0.00	0.00	38.05	16.20	26.68	0.23	0.00	2.03	0.00	0.53	83.71
Other Lee Green DC	0.00	0.00	0.75	0.00	4.22	0.00	0.99	0.00	0.00	0.00	5.96
Sub-total	**0.00**	**0.00**	**41.78**	**16.52**	**30.89**	**0.23**	**0.99**	**2.03**	**0.00**	**0.53**	**92.98**
Lewisham Southern											
M&S Downham	0.18	0.00	0.00	0.00	1.82	5.84	1.19	0.41	1.25	0.75	11.44
Other Downham DC	0.00	0.00	0.30	0.00	3.19	3.72	0.99	0.00	0.00	0.00	8.20
Lidl, Bellingham	0.00	0.00	0.00	0.00	2.39	0.91	4.38	0.00	0.21	0.11	8.00
Sainsbury's, Bell Green	0.00	0.66	0.00	3.08	5.02	0.99	72.03	7.30	6.90	7.03	103.00
Sub-total	**0.18**	**0.66**	**0.30**	**3.08**	**12.43**	**11.46**	**78.60**	**7.70**	**8.36**	**7.89**	**130.65**
Lewisham Western											
Lidl, Sydenham	0.00	0.00	0.00	0.00	0.00	0.00	9.15	0.41	0.00	1.92	11.48
Other Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	12.34	0.00	0.00	0.85	13.19
Sainsbury's, Forest Hill	0.00	0.00	0.00	0.00	0.00	0.15	8.56	5.47	0.00	28.78	42.96
Other Forest Hill DC	0.00	0.00	0.00	0.00	0.00	0.00	4.38	0.00	0.00	2.13	6.51
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.15**	**34.42**	**5.88**	**0.00**	**33.68**	**74.13**
LB Lewisham total	**50.57**	**83.62**	**69.83**	**130.08**	**68.17**	**16.85**	**165.95**	**17.44**	**9.82**	**53.61**	**665.93**
Surrey Quays	66.07	13.35	0.00	2.11	0.00	0.00	0.00	0.00	1.25	0.43	83.21
Peckham	1.59	24.30	0.00	0.00	0.00	0.00	1.39	0.00	0.00	2.45	29.73
Bermondsey	14.10	18.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.96	33.66
East Dulwich	0.00	18.82	0.00	2.11	0.00	0.00	0.00	10.75	0.00	27.60	59.28
Other in LB Southwark	4.93	19.70	0.30	0.16	0.00	0.00	1.39	0.00	0.00	0.32	26.81
Greenwich	1.23	2.63	4.48	2.92	0.00	0.00	0.00	0.00	0.00	0.00	11.25
Other in LB Greenwich	0.53	0.44	30.59	2.75	7.30	0.00	0.00	1.42	0.00	0.00	43.02
Bromley	0.00	0.00	2.09	0.16	1.71	18.97	0.00	0.00	6.48	0.00	29.41
Beckenham	0.00	0.00	0.00	0.00	5.36	2.35	5.97	14.40	36.16	3.41	67.65
Penge	0.00	0.00	0.00	0.00	0.00	0.00	2.79	0.41	32.82	0.00	36.01
Other in LB Bromley	0.00	0.00	0.75	0.00	3.31	16.62	1.39	24.13	61.03	0.21	107.44
Local centres in suvrey area	18.15	29.33	21.19	17.66	10.83	19.73	17.11	35.08	43.69	12.58	225.34
Other	19.03	8.10	19.99	4.05	17.33	1.37	2.98	99.15	17.77	5.01	194.77
TOTAL	**176.19**	**218.89**	**149.20**	**161.99**	**114.00**	**75.89**	**198.98**	**202.76**	**209.02**	**106.58**	**1,613.51**

Source: Tables 3 and 6

Table 8 - Future 2030 convenience goods expendiiture patterns by zone (£M)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2030	190.28	240.25	153.56	160.00	112.08	80.94	203.75	204.87	209.67	106.69	**1,662.08**
Lewisham Northern											
Asda, Deptford	0.76	4.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.33
Other Deptford DC	12.94	5.29	0.00	0.00	0.00	0.00	0.41	0.00	0.00	0.00	18.63
Sainsbury's, New Cross	0.95	24.75	0.00	2.08	0.00	0.00	1.02	0.00	0.00	0.00	28.80
Other New Cross DC	1.33	12.73	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	14.39
Out-of-centre commitments	19.03	12.01	1.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.58
Sub-total	**35.01**	**59.34**	**1.54**	**2.40**	**0.00**	**0.00**	**1.43**	**0.00**	**0.00**	**0.00**	**99.71**
Lewisham Central											
Sainsbury's, Lewisham	6.28	12.01	4.76	32.80	5.16	0.00	12.23	0.82	0.00	3.95	78.00
Tesco, Lewisham	6.47	7.21	6.45	29.92	4.26	0.73	6.52	0.00	0.00	0.32	61.87
Other Lewisham TC	6.66	8.41	15.82	28.48	7.06	0.16	13.45	0.20	0.00	4.69	84.94
Aldi, Catford	0.00	3.12	0.00	8.64	5.16	0.65	4.89	0.61	0.00	2.45	25.53
Tesco, Catford	0.00	0.72	0.00	2.08	0.78	0.73	8.56	0.00	1.47	0.00	14.34
Other Catford DC	0.00	0.24	0.00	4.80	2.02	3.08	6.11	0.20	0.00	0.11	16.56
Sub-total	**19.41**	**31.71**	**27.03**	**106.72**	**24.43**	**5.34**	**51.75**	**1.84**	**1.47**	**11.52**	**281.23**
Lewisham Eastern											
Other Blackheath DC	0.00	0.00	3.07	0.32	0.00	0.00	0.00	0.00	0.00	0.00	3.39
Sainsbury's, Lee Green	0.00	0.00	39.16	16.00	26.23	0.24	0.00	2.05	0.00	0.53	84.21
Other Lee Green DC	0.00	0.00	0.77	0.00	4.15	0.00	1.02	0.00	0.00	0.00	5.93
Sub-total	**0.00**	**0.00**	**43.00**	**16.32**	**30.37**	**0.24**	**1.02**	**2.05**	**0.00**	**0.53**	**93.53**
Lewisham Southern											
M&S Downham	0.19	0.00	0.00	0.00	1.79	6.23	1.22	0.41	1.26	0.75	11.85
Other Downham DC	0.00	0.00	0.31	0.00	3.14	3.97	1.02	0.00	0.00	0.00	8.43
Lidl, Bellingham	0.00	0.00	0.00	0.00	2.35	0.97	4.48	0.00	0.21	0.11	8.12
Sainsbury's, Bell Green	0.00	0.72	0.00	3.04	4.93	1.05	73.76	7.38	6.92	7.04	104.84
Sub-total	**0.19**	**0.72**	**0.31**	**3.04**	**12.22**	**12.22**	**80.48**	**7.78**	**8.39**	**7.89**	**133.25**
Lewisham Western											
Lidl, Sydenham	0.00	0.00	0.00	0.00	0.00	0.00	9.37	0.41	0.00	1.92	11.70
Other Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	12.63	0.00	0.00	0.85	13.49
Sainsbury's, Forest Hill	0.00	0.00	0.00	0.00	0.00	0.16	8.76	5.53	0.00	28.81	43.26
Other Forest Hill DC	0.00	0.00	0.00	0.00	0.00	0.00	4.48	0.00	0.00	2.13	6.62
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.16**	**35.25**	**5.94**	**0.00**	**33.71**	**75.07**
LB Lewisham total	**54.61**	**91.77**	**71.87**	**128.48**	**67.02**	**17.97**	**169.93**	**17.62**	**9.85**	**53.66**	**682.79**
Surrey Quays	71.35	14.66	0.00	2.08	0.00	0.00	0.00	0.00	1.26	0.43	89.77
Peckham	1.71	26.67	0.00	0.00	0.00	0.00	1.43	0.00	0.00	2.45	32.26
Bermondsey	15.22	20.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.96	36.60
East Dulwich	0.00	20.66	0.00	2.08	0.00	0.00	0.00	10.86	0.00	27.63	61.23
Other in LB Southwark	5.33	21.62	0.31	0.16	0.00	0.00	1.43	0.00	0.00	0.32	29.16
Greenwich	1.33	2.88	4.61	2.88	0.00	0.00	0.00	0.00	0.00	0.00	11.70
Other in LB Greenwich	0.57	0.48	31.48	2.72	7.17	0.00	0.00	1.43	0.00	0.00	43.86
Bromley	0.00	0.00	2.15	0.16	1.68	20.23	0.00	0.00	6.50	0.00	30.72
Beckenham	0.00	0.00	0.00	0.00	5.27	2.51	6.11	14.55	36.27	3.41	68.12
Penge	0.00	0.00	0.00	0.00	0.00	0.00	2.85	0.41	32.92	0.00	36.18
Other in LB Bromley	0.00	0.00	0.77	0.00	3.25	17.72	1.43	24.38	61.22	0.21	108.99
Local centres in suvrey area	19.60	32.19	21.81	17.44	10.65	21.04	17.52	35.44	43.82	12.59	232.10
Other	20.55	8.89	20.58	4.00	17.04	1.46	3.06	100.18	17.82	5.01	198.58
TOTAL	**190.28**	**240.25**	**153.56**	**160.00**	**112.08**	**80.94**	**203.75**	**204.87**	**209.67**	**106.69**	**1,662.08**

Source: Tables 3 and 6

Table 9 - Future 2035 convenience goods expendiiture patterns by zone (£M)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	201.59	262.37	157.18	161.15	113.87	82.36	214.78	210.53	213.40	108.23	**1,725.46**
Lewisham Northern											
Asda, Deptford	0.81	4.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.79
Other Deptford DC	13.71	5.77	0.00	0.00	0.00	0.00	0.43	0.00	0.00	0.00	19.91
Sainsbury's, New Cross	1.01	27.02	0.00	2.09	0.00	0.00	1.07	0.00	0.00	0.00	31.20
Other New Cross DC	1.41	13.91	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	15.64
Out-of-centre commitments	20.16	13.12	1.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.85
Sub-total	**37.09**	**64.81**	**1.57**	**2.42**	**0.00**	**0.00**	**1.50**	**0.00**	**0.00**	**0.00**	**107.39**
Lewisham Central											
Sainsbury's, Lewisham	6.65	13.12	4.87	33.04	5.24	0.00	12.89	0.84	0.00	4.00	80.65
Tesco, Lewisham	6.85	7.87	6.60	30.14	4.33	0.74	6.87	0.00	0.00	0.32	63.73
Other Lewisham TC	7.06	9.18	16.19	28.69	7.17	0.16	14.18	0.21	0.00	4.76	87.60
Aldi, Catford	0.00	3.41	0.00	8.70	5.24	0.66	5.15	0.63	0.00	2.49	26.29
Tesco, Catford	0.00	0.79	0.00	2.09	0.80	0.74	9.02	0.00	1.49	0.00	14.94
Other Catford DC	0.00	0.26	0.00	4.83	2.05	3.13	6.44	0.21	0.00	0.11	17.04
Sub-total	**20.56**	**34.63**	**27.66**	**107.49**	**24.82**	**5.44**	**54.56**	**1.89**	**1.49**	**11.69**	**290.24**
Lewisham Eastern											
Other Blackheath DC	0.00	0.00	3.14	0.32	0.00	0.00	0.00	0.00	0.00	0.00	3.47
Sainsbury's, Lee Green	0.00	0.00	40.08	16.12	26.64	0.25	0.00	2.11	0.00	0.54	85.73
Other Lee Green DC	0.00	0.00	0.79	0.00	4.21	0.00	1.07	0.00	0.00	0.00	6.07
Sub-total	**0.00**	**0.00**	**44.01**	**16.44**	**30.86**	**0.25**	**1.07**	**2.11**	**0.00**	**0.54**	**95.27**
Lewisham Southern											
M&S Downham	0.20	0.00	0.00	0.00	1.82	6.34	1.29	0.42	1.28	0.76	12.11
Other Downham DC	0.00	0.00	0.31	0.00	3.19	4.04	1.07	0.00	0.00	0.00	8.61
Lidl, Bellingham	0.00	0.00	0.00	0.00	2.39	0.99	4.73	0.00	0.21	0.11	8.43
Sainsbury's, Bell Green	0.00	0.79	0.00	3.06	5.01	1.07	77.75	7.58	7.04	7.14	109.45
Sub-total	**0.20**	**0.79**	**0.31**	**3.06**	**12.41**	**12.44**	**84.84**	**8.00**	**8.54**	**8.01**	**138.60**
Lewisham Western											
Lidl, Sydenham	0.00	0.00	0.00	0.00	0.00	0.00	9.88	0.42	0.00	1.95	12.25
Other Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	13.32	0.00	0.00	0.87	14.18
Sainsbury's, Forest Hill	0.00	0.00	0.00	0.00	0.00	0.16	9.24	5.68	0.00	29.22	44.31
Other Forest Hill DC	0.00	0.00	0.00	0.00	0.00	0.00	4.73	0.00	0.00	2.16	6.89
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.16**	**37.16**	**6.11**	**0.00**	**34.20**	**77.63**
LB Lewisham total	**57.86**	**100.23**	**73.56**	**129.41**	**68.09**	**18.28**	**179.13**	**18.11**	**10.03**	**54.44**	**709.13**
Surrey Quays	75.59	16.00	0.00	2.09	0.00	0.00	0.00	0.00	1.28	0.43	95.41
Peckham	1.81	29.12	0.00	0.00	0.00	0.00	1.50	0.00	0.00	2.49	34.93
Bermondsey	16.13	22.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.97	39.40
East Dulwich	0.00	22.56	0.00	2.09	0.00	0.00	0.00	11.16	0.00	28.03	63.85
Other in LB Southwark	5.64	23.61	0.31	0.16	0.00	0.00	1.50	0.00	0.00	0.32	31.56
Greenwich	1.41	3.15	4.72	2.90	0.00	0.00	0.00	0.00	0.00	0.00	12.18
Other in LB Greenwich	0.60	0.52	32.22	2.74	7.29	0.00	0.00	1.47	0.00	0.00	44.85
Bromley	0.00	0.00	2.20	0.16	1.71	20.59	0.00	0.00	6.62	0.00	31.27
Beckenham	0.00	0.00	0.00	0.00	5.35	2.55	6.44	14.95	36.92	3.46	69.68
Penge	0.00	0.00	0.00	0.00	0.00	0.00	3.01	0.42	33.50	0.00	36.93
Other in LB Bromley	0.00	0.00	0.79	0.00	3.30	18.04	1.50	25.05	62.31	0.22	111.21
Local centres in suvrey area	20.76	35.16	22.32	17.57	10.82	21.41	18.47	36.42	44.60	12.77	240.30
Other	21.77	9.71	21.06	4.03	17.31	1.48	3.22	102.95	18.14	5.09	204.76
TOTAL	**201.59**	**262.37**	**157.18**	**161.15**	**113.87**	**82.36**	**214.78**	**210.53**	**213.40**	**108.23**	**1,725.46**

Source: Tables 3 and 6

Table 10 - Future 2040 convenience goods expendiiture patterns by zone (£M)

Neighbourhood/Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2040	209.17	275.07	162.93	164.13	115.11	84.95	218.46	216.44	219.38	111.39	**1,777.04**
Lewisham Northern											
Asda, Deptford	0.84	5.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.06
Other Deptford DC	14.22	6.05	0.00	0.00	0.00	0.00	0.44	0.00	0.00	0.00	20.71
Sainsbury's, New Cross	1.05	28.33	0.00	2.13	0.00	0.00	1.09	0.00	0.00	0.00	32.60
Other New Cross DC	1.46	14.58	0.00	0.33	0.00	0.00	0.00	0.00	0.00	0.00	16.37
Out-of-centre commitments	20.92	13.75	1.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	36.30
Sub-total	**38.49**	**67.94**	**1.63**	**2.46**	**0.00**	**0.00**	**1.53**	**0.00**	**0.00**	**0.00**	**112.05**
Lewisham Central											
Sainsbury's, Lewisham	6.90	13.75	5.05	33.65	5.30	0.00	13.11	0.87	0.00	4.12	82.74
Tesco, Lewisham	7.11	8.25	6.84	30.69	4.37	0.76	6.99	0.00	0.00	0.33	65.36
Other Lewisham TC	7.32	9.63	16.78	29.22	7.25	0.17	14.42	0.22	0.00	4.90	89.90
Aldi, Catford	0.00	3.58	0.00	8.86	5.30	0.68	5.24	0.65	0.00	2.56	26.87
Tesco, Catford	0.00	0.83	0.00	2.13	0.81	0.76	9.18	0.00	1.54	0.00	15.24
Other Catford DC	0.00	0.28	0.00	4.92	2.07	3.23	6.55	0.22	0.00	0.11	17.38
Sub-total	**21.34**	**36.31**	**28.68**	**109.47**	**25.09**	**5.61**	**55.49**	**1.95**	**1.54**	**12.03**	**297.50**
Lewisham Eastern											
Other Blackheath DC	0.00	0.00	3.26	0.33	0.00	0.00	0.00	0.00	0.00	0.00	3.59
Sainsbury's, Lee Green	0.00	0.00	41.55	16.41	26.94	0.25	0.00	2.16	0.00	0.56	87.87
Other Lee Green DC	0.00	0.00	0.81	0.00	4.26	0.00	1.09	0.00	0.00	0.00	6.17
Sub-total	**0.00**	**0.00**	**45.62**	**16.74**	**31.20**	**0.25**	**1.09**	**2.16**	**0.00**	**0.56**	**97.63**
Lewisham Southern											
M&S Downham	0.21	0.00	0.00	0.00	1.84	6.54	1.31	0.43	1.32	0.78	12.43
Other Downham DC	0.00	0.00	0.33	0.00	3.22	4.16	1.09	0.00	0.00	0.00	8.80
Lidl, Bellingham	0.00	0.00	0.00	0.00	2.42	1.02	4.81	0.00	0.22	0.11	8.57
Sainsbury's, Bell Green	0.00	0.83	0.00	3.12	5.06	1.10	79.08	7.79	7.24	7.35	111.58
Sub-total	**0.21**	**0.83**	**0.33**	**3.12**	**12.55**	**12.83**	**86.29**	**8.22**	**8.78**	**8.24**	**141.39**
Lewisham Western											
Lidl, Sydenham	0.00	0.00	0.00	0.00	0.00	0.00	10.05	0.43	0.00	2.01	12.49
Other Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	13.54	0.00	0.00	0.89	14.44
Sainsbury's, Forest Hill	0.00	0.00	0.00	0.00	0.00	0.17	9.39	5.84	0.00	30.08	45.48
Other Forest Hill DC	0.00	0.00	0.00	0.00	0.00	0.00	4.81	0.00	0.00	2.23	7.03
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.17**	**37.79**	**6.28**	**0.00**	**35.20**	**79.44**
LB Lewisham total	**60.03**	**105.08**	**76.25**	**131.80**	**68.84**	**18.86**	**182.20**	**18.61**	**10.31**	**56.03**	**728.01**
Surrey Quays	78.44	16.78	0.00	2.13	0.00	0.00	0.00	0.00	1.32	0.45	99.12
Peckham	1.88	30.53	0.00	0.00	0.00	0.00	1.53	0.00	0.00	2.56	36.51
Bermondsey	16.73	23.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	41.12
East Dulwich	0.00	23.66	0.00	2.13	0.00	0.00	0.00	11.47	0.00	28.85	66.11
Other in LB Southwark	5.86	24.76	0.33	0.16	0.00	0.00	1.53	0.00	0.00	0.33	32.97
Greenwich	1.46	3.30	4.89	2.95	0.00	0.00	0.00	0.00	0.00	0.00	12.61
Other in LB Greenwich	0.63	0.55	33.40	2.79	7.37	0.00	0.00	1.52	0.00	0.00	46.25
Bromley	0.00	0.00	2.28	0.16	1.73	21.24	0.00	0.00	6.80	0.00	32.21
Beckenham	0.00	0.00	0.00	0.00	5.41	2.63	6.55	15.37	37.95	3.56	71.48
Penge	0.00	0.00	0.00	0.00	0.00	0.00	3.06	0.43	34.44	0.00	37.93
Other in LB Bromley	0.00	0.00	0.81	0.00	3.34	18.60	1.53	25.76	64.06	0.22	114.32
Local centres in suvrey area	21.54	36.86	23.14	17.89	10.94	22.09	18.79	37.44	45.85	13.14	247.68
Other	22.59	10.18	21.83	4.10	17.50	1.53	3.28	105.84	18.65	5.24	210.73
TOTAL	**209.17**	**275.07**	**162.93**	**164.13**	**115.11**	**84.95**	**218.46**	**216.44**	**219.38**	**111.39**	**1,777.04**

Source: Tables 3 and 6

Table 11 - Convenience Goods Floorspace and Benchmark Turnover in Bournemouth

Area	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Deptford	Asda, Deptford High Street	641	85%	545	£14,852	£8.09
	Tesco Express, Deptford High Street	224	95%	213	£14,515	£3.09
	Iceland, Deptford High Street	456	98%	447	£7,109	£3.18
	Co-op, Deptford Bridge	336	90%	302	£11,407	£3.45
	Co-op, Yeoman Street	336	90%	302	£11,407	£3.45
	Other Deptford DC	4,527	100%	4,527	£7,000	£31.69
	Sub Total	**6,520**		**6,336**		**£52.95**
New Cross	Sainsbury's, New Cross Road	3,667	65%	2,384	£12,297	£29.31
	Iceland, New Cross Road	537	98%	526	£7,109	£3.74
	Sainsbury's Local, Lewisham Way	217	95%	206	£12,297	£2.54
	Other New Cross DC	1,576	100%	1,576	£7,000	£11.03
	Sub-Total	**5,997**		**4,692**		**£46.62**
Lewisham	Sainsbury's, Lewisham Centre	2,309	85%	1,963	£12,297	£24.13
	M&S Foodhall, Lewisham Centre	697	100%	697	£10,497	£7.32
	Iceland, Lewisham High Street	472	98%	463	£7,109	£3.29
	Londis, Lewisham High Street	155	95%	147	£13,237	£1.95
	Tesco, Lewisham Road	3,036	85%	2,581	£14,515	£37.46
	Asda, Thurston Road	1,452	90%	1,307	£14,852	£19.41
	Tesco Express, Loampit Vale	116	95%	110	£14,515	£1.60
	Sainsbury's Local, Loampit Vale	186	95%	177	£12,297	£2.17
	M&S Simply Food, Lee High Road	84	95%	80	£10,497	£0.84
	Co-op, Burnt Ash Hill	336	95%	319	£11,407	£3.64
	Co-op, Hither Green Lane	293	95%	278	£11,407	£3.18
	Tesco Express, Hither Green Lane	252	95%	239	£14,515	£3.47
	Tesco Express, Lewisham Way	255	95%	242	£14,515	£3.52
	Budgens, Brockley Road	244	95%	232	£10,000	£2.32
	Co-op, Brockley Road, Crofton Park	143	95%	136	£11,407	£1.55
	Co-op, Brockley	180	95%	171	£11,407	£1.95
	Co-op, Hilton House, St Norberts Road	204	95%	194	£11,407	£2.21
	Sainsbury's Local, Brockley	186	95%	177	£12,297	£2.17
	Other Lewisham TC	3,897	100%	3,897	£7,000	£27.28
	Sub-Total	**14,497**		**13,409**		**£149.45**
Blackheath/ Lee Green	Sainsbury's, Burnt Ash Road	2,849	85%	2,422	£12,297	£29.78
	Other Blackheath DC	1,000	100%	1,000	£7,000	£7.00
	Sainsbury's Local, Staplehurst Road	265	95%	252	£12,297	£3.10
	Lidl, Lee High Road	1,118	85%	950	£11,439	£10.87
	Other Lee Green DC	274	100%	274	£7,000	£1.92
	Sub-Total	**5,506**		**4,898**		**£52.66**
Downham	Co-operative Food, Downham Way	250	95%	238	£11,407	£2.71
	M&S Simply Food, Bromley Road	200	95%	190	£10,497	£1.99
	Iceland, Bromley Road	369	98%	362	£7,109	£2.57
	Tesco Express, Bromley Road	286	95%	272	£14,515	£3.94
	Tesco Express, Grove Park	116	95%	110	£14,515	£1.60
	Sainsbury's Local, Grove Park	294	95%	279	£12,297	£3.43
	Other Downham DC	1,000	100%	1,000	£7,000	£7.00
	Sub Total	**2,515**		**2,450**		**£23.25**
Catford	Tesco, Winslade Way	3,022	75%	2,267	£14,515	£32.90
	Iceland, Winslade Way	537	98%	526	£7,109	£3.74
	Aldi, Rushey Green	709	85%	603	£11,195	£6.75
	Tesco Express, Rushey Green	252	95%	239	£14,515	£3.47
	Lidl, Plassy Road	851	85%	723	£11,439	£8.27
	Co-op, Sangley Road	241	95%	229	£11,407	£2.61
	Budgens, Shell PSF, Verdant Lane	84	95%	80	£8,000	£0.64
	Morrison's Daily, Brownhill Road	177	95%	168	£13,074	£2.20
	Sainsbury's Local, Adenmore Road	186	95%	177	£12,297	£2.17
	Other Catford TC	2,548	100%	2,548	£7,000	£17.84
	Sub Total	**8,607**		**7,560**		**£80.59**
Sydenham/ Forest Hill	Lidl, Sydenham Road	781	85%	664	£11,439	£7.59
	Tesco Express, Sydenham Road	261	95%	248	£14,515	£3.60
	Sainsbury's, London Road, Forest Hill	2,273	85%	1,932	£12,297	£23.76
	Sainsbury's Local, Honor Oak Park	127	95%	121	£12,297	£1.48
	Co-op, Stanstead Road	300	95%	285	£11,407	£3.25
	Sainsbury's Local, Kirkdale	102	95%	97	£12,297	£1.19
	Tesco Express, Kirkdale	218	95%	207	£14,515	£3.01
	Other Sydenham DC	2,576	100%	2,576	£7,000	£18.03
	Other Forest Hill DC	1,027	100%	1,027	£7,000	£7.19
	Sub-Total	**7,665**		**7,157**		**£69.10**
Bell Green/ Bellingham	Aldi, Bell Green	1,199	80%	959	£11,195	£10.74
	Sainsbury's Bell Green	7,719	65%	5,017	£12,297	£61.70
	Co-operative, Randelsdown Road, Bellingham	269	95%	256	£11,407	£2.92
	Co-operative, Bromley Road, Bellingham	233	95%	221	£11,407	£2.52
	Lidl, Southend Lane, Bellingham	904	85%	768	£11,439	£8.79
	B&M, Ravensbourne Retail Park	1,620	20%	324	£2,319	£0.75
	Tesco Express, Perry Hill	186	95%	177	£14,515	£2.56
	Sub Total	**12,130**		**7,723**		**£89.98**
TOTAL		**63,437**		**54,224**		**£564.61**

Source: *ORC Storepoint 2021, Global Data and Lewisham Retail Study Update 2019*

Table 12 - Commitments for new convenience goods sales floorspace

Scheme	Maximum proposed floorspace sq.m gross	Estmated % convenience retail	Convenience floorspace sq.m gross	Sale floorspace sq.m net
Lewisham Gateway (Phase 2)	4,381	20%	876	613
Carpetright site, Lewisham	960	30%	288	202
New Bermondsey /Surrey Canal Triangle	6,300	16%	1,000	700
Convoys Wharf	10,330	20%	2,066	1,653
Oxestalls Road, Deptford	3,571	20%	700	560
Leegate Centre	3,950	35%	1,383	1,106
Leegate Centre (loss)	-1,000	30%	-300	-240
Sub-total	**28,492**		**6,013**	**4,594**

Source: Planning application details.

Table 13 - Summary of convenience goods expenditure 2021 to 2040 (£M)

Area	2021	2025	2030	2035	2040
Available expenditure					
Lewisham Northern - Deptford/New Cross	60.89	91.80	99.71	107.39	112.05
Lewisham Central - Lewisham/Catford	275.38	276.38	281.23	290.24	297.50
Lewisham Eastern - Blackheath/Lee Green	91.38	92.98	93.53	95.27	97.63
Lewisham Southern - Bell Green/Downham	130.77	130.65	133.25	138.60	141.39
Lewisham Western - Forest Hill/Sydenham	74.69	74.13	75.07	77.63	79.44
Total	**633.10**	**665.93**	**682.79**	**709.13**	**728.01**
Benchmark turnover of existing facilities					
Lewisham Northern - Deptford/New Cross	99.56	99.56	99.56	99.56	99.56
Lewisham Central - Lewisham/Catford	230.05	230.05	230.05	230.05	230.05
Lewisham Eastern - Blackheath/Lee Green	52.66	52.66	52.66	52.66	52.66
Lewisham Southern - Bell Green/Downham	113.23	113.23	113.23	113.23	113.23
Lewisham Western - Forest Hill/Sydenham	69.10	69.10	69.10	69.10	69.10
Total	**564.61**	**564.61**	**564.61**	**564.61**	**564.61**
Turnover of commitments					
Lewisham Northern - Deptford/New Cross	0.00	34.95	34.95	34.95	34.95
Lewisham Central - Lewisham/Catford	0.00	9.78	9.78	9.78	9.78
Lewisham Eastern - Blackheath/Lee Green	0.00	10.39	10.39	10.39	10.39
Lewisham Southern - Bell Green/Downham	0.00	0.00	0.00	0.00	0.00
Lewisham Western - Forest Hill/Sydenham	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**55.12**	**55.12**	**55.12**	**55.12**
Surplus/deficit expenditure £M					
Lewisham Northern - Deptford/New Cross	-38.68	-42.72	-34.80	-27.13	-22.47
Lewisham Central - Lewisham/Catford	45.33	36.55	41.41	50.41	57.68
Lewisham Eastern - Blackheath/Lee Green	38.71	29.92	30.48	32.22	34.57
Lewisham Southern - Bell Green/Downham	17.53	17.41	20.01	25.36	28.15
Lewisham Western - Forest Hill/Sydenham	5.58	5.03	5.96	8.52	10.34
Total	**68.49**	**46.20**	**63.05**	**89.39**	**108.27**

Source: Tables 5 to 12

Table 14 - Convenience goods floorspace capacity up to 2040

	2021	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Floorspace projection (sq.m net)					
Lewisham Northern - Deptford/New Cross	-3,223	-3,560	-2,900	-2,261	-1,872
Lewisham Central - Lewisham/Catford	3,778	3,046	3,451	4,201	4,806
Lewisham Eastern - Blackheath/Lee Green	3,226	2,493	2,540	2,685	2,881
Lewisham Southern - Bell Green/Downham	1,461	1,451	1,668	2,114	2,346
Lewisham Western - Forest Hill/Sydenham	465	419	497	710	861
Total	**5,707**	**3,850**	**5,254**	**7,449**	**9,022**
Floorspace Projection (sq.m gross)					
Lewisham Northern - Deptford/New Cross	-4,604	-5,085	-4,143	-3,230	-2,675
Lewisham Central - Lewisham/Catford	5,397	4,351	4,929	6,002	6,866
Lewisham Eastern - Blackheath/Lee Green	4,609	3,562	3,628	3,835	4,116
Lewisham Southern - Bell Green/Downham	2,087	2,073	2,382	3,019	3,352
Lewisham Western - Forest Hill/Sydenham	665	599	710	1,015	1,230
Total	**8,154**	**5,500**	**7,506**	**10,642**	**12,889**

Source: Table 13

Appendix 3 Comparison goods assessment

Table 1 - Study area population projections

Zone	2019	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	80,681	83,403	89,543	97,031	102,616	106,292
2 - New Cross/Southwark (east)	108,043	110,253	117,402	129,296	140,952	147,513
3 - Lewisham Central	64,838	64,021	67,006	69,199	70,706	73,164
4 - Blackheath/Greenwich (west)	68,256	67,710	67,642	67,039	67,401	68,526
5 - Lee Green/Grove Park	54,736	53,862	54,446	53,712	54,470	54,970
6 - Bromley/Downham	30,318	31,364	33,437	35,781	36,345	37,422
7 - Catford/Sydenham	93,370	92,853	92,622	95,168	100,143	101,678
8 - Crystal Palace/ West Norwood	95,126	95,334	95,526	96,850	99,352	101,962
9 - Beckenham/ South Norwood	91,862	91,685	91,668	92,268	93,744	96,198
10 - Forest Hill/Southwark (south)	44,925	45,381	45,372	45,574	46,150	47,414
Total	**732,155**	**735,865**	**754,664**	**781,918**	**811,880**	**835,139**

Sources:
Experian popluation for zones at 2019
GLA ward level population projections - 2019-based BPO Draft, Local Plan scenario 1 standard projection for LB of Lewisham.
GLA ward level population projections - housing led 2018 for areas outside LB Lewisham.

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	2,272	2,485	2,785	3,160	3,615
2 - New Cross/Southwark (east)	2,252	2,463	2,760	3,132	3,583
3 - Lewisham Central	2,863	3,131	3,509	3,982	4,555
4 - Blackheath/Greenwich (west)	3,353	3,667	4,109	4,663	5,335
5 - Lee Green/Grove Park	2,679	2,930	3,284	3,726	4,263
6 - Bromley/Downham	3,267	3,573	4,004	4,543	5,198
7 - Catford/Sydenham	2,772	3,032	3,398	3,855	4,411
8 - Crystal Palace/ West Norwood	2,731	2,987	3,347	3,798	4,345
9 - Beckenham/ South Norwood	3,005	3,287	3,683	4,180	4,782
10 - Forest Hill/Southwark (south)	3,425	3,746	4,198	4,764	5,450

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Breifing Note 18 (October 2020)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	189.53	222.53	270.23	324.29	384.28
2 - New Cross/Southwark (east)	248.27	289.12	356.83	441.40	528.48
3 - Lewisham Central	183.29	209.80	242.81	281.52	333.26
4 - Blackheath/Greenwich (west)	227.03	248.04	275.48	314.29	365.55
5 - Lee Green/Grove Park	144.31	159.54	176.38	202.96	234.32
6 - Bromley/Downham	102.46	119.46	143.26	165.12	194.50
7 - Catford/Sydenham	257.41	280.82	323.35	386.09	448.47
8 - Crystal Palace/ West Norwood	260.37	285.33	324.18	377.36	443.05
9 - Beckenham/ South Norwood	275.56	301.31	339.86	391.82	459.99
10 - Forest Hill/Southwark (south)	155.45	169.97	191.32	219.84	258.39
Total	**2,043.68**	**2,285.91**	**2,643.70**	**3,104.69**	**3,650.30**

Source: Tables 1 and 2

Table 4 - Base year 2021 comparison goods market shares by zone (%)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Deptford	2.3%	1.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
New Cross	0.2%	5.3%	0.0%	1.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**2.5%**	**6.3%**	**0.8%**	**1.6%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**
Lewisham Central										
Lewisham town centre	13.5%	27.7%	21.1%	47.1%	12.0%	1.4%	17.0%	0.3%	0.2%	7.3%
Catford town centre	0.5%	0.7%	0.0%	2.4%	5.7%	2.8%	7.5%	0.0%	0.4%	0.2%
Catford out of centre	0.2%	1.1%	1.1%	7.2%	8.7%	7.0%	5.0%	0.2%	1.1%	2.8%
Sub-total	**14.2%**	**29.5%**	**22.2%**	**56.7%**	**26.4%**	**11.2%**	**29.5%**	**0.5%**	**1.7%**	**10.3%**
Lewisham Eastern										
Blackheath	0.1%	0.3%	1.6%	0.2%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lee Green	0.1%	0.0%	5.1%	0.9%	3.6%	0.1%	0.0%	0.0%	0.1%	0.0%
Sub-total	**0.2%**	**0.3%**	**6.7%**	**1.1%**	**4.6%**	**0.1%**	**0.0%**	**0.0%**	**0.1%**	**0.0%**
Lewisham Southern										
Downham	0.0%	0.0%	0.0%	0.0%	0.4%	1.4%	0.0%	0.0%	0.0%	0.0%
Bell Green Retail Park	0.0%	0.1%	0.0%	0.6%	1.1%	0.6%	10.4%	0.4%	1.9%	3.5%
Sub-total	**0.0%**	**0.1%**	**0.0%**	**0.6%**	**1.5%**	**2.0%**	**10.4%**	**0.4%**	**1.9%**	**3.5%**
Lewisham Western										
Sydenham	0.0%	0.2%	0.0%	0.2%	0.0%	0.5%	11.4%	0.5%	0.6%	1.3%
Forest Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	5.9%	0.1%	0.0%	7.4%
Sub-total	**0.0%**	**0.3%**	**0.0%**	**0.2%**	**0.0%**	**0.5%**	**17.3%**	**0.6%**	**0.6%**	**8.7%**
LB Lewisham total	**16.9%**	**36.5%**	**29.7%**	**60.2%**	**32.6%**	**13.8%**	**57.2%**	**1.5%**	**4.3%**	**22.7%**
Outside LB Lewisham										
Surrey Quays/Canda Waters	30.3%	4.2%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Peckham	1.9%	13.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.4%	0.1%	6.4%
Greenwich	3.9%	0.6%	9.7%	2.3%	1.3%	0.3%	0.6%	0.4%	0.9%	0.2%
Bromley	0.9%	3.1%	2.5%	4.0%	25.9%	66.4%	19.0%	3.5%	23.5%	9.2%
Penge	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	2.0%	0.9%	9.7%	1.0%
Beckenham	0.0%	0.1%	0.5%	0.1%	0.4%	0.2%	0.3%	1.2%	8.3%	0.2%
East Dulwich	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	10.8%
Central London	14.7%	14.1%	12.9%	11.8%	4.2%	7.2%	7.6%	22.9%	6.7%	22.1%
Croydon	1.0%	4.3%	0.5%	0.8%	0.4%	1.5%	6.3%	23.9%	34.0%	10.7%
Bluewater	1.5%	1.8%	19.6%	5.1%	7.8%	4.5%	1.7%	0.4%	1.9%	3.8%
Charlton retail warehousing	1.2%	0.6%	9.0%	0.4%	5.7%	0.0%	0.0%	0.3%	0.0%	0.0%
Old Kent Road	16.3%	16.8%	0.1%	0.5%	0.0%	0.0%	0.1%	0.2%	0.0%	2.2%
Brixton	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	9.9%	0.0%	1.6%
Streatham	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	9.7%	0.0%	0.0%
Eltham	0.1%	0.0%	2.4%	0.4%	6.7%	0.0%	0.0%	0.0%	0.0%	0.7%
Stratford/Westfields	5.0%	0.0%	1.6%	0.6%	0.2%	0.0%	0.3%	0.0%	0.0%	0.3%
Local centres in suvrey area	0.0%	0.3%	2.4%	1.9%	1.4%	0.0%	2.2%	13.8%	6.6%	1.3%
Other	6.2%	3.0%	9.1%	8.3%	13.3%	4.5%	2.7%	10.2%	4.0%	5.6%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Lewisham Retail Capacity Study 2019 and Lichfields' analysis.

Table 5 - Base year 2021 comparison goods expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2021	189.53	248.27	183.29	227.03	144.31	102.46	257.41	260.37	275.56	155.45	**2,043.68**
Lewisham Northern											
Deptford	4.36	2.48	1.47	0.00	0.00	0.00	0.00	0.00	0.00	0.31	8.62
New Cross	0.38	13.16	0.00	3.63	0.14	0.00	0.00	0.00	0.00	0.00	17.31
Sub-total	**4.74**	**15.64**	**1.47**	**3.63**	**0.14**	**0.00**	**0.00**	**0.00**	**0.00**	**0.31**	**25.93**
Lewisham Central											
Lewisham town centre	25.59	68.77	38.67	106.93	17.32	1.43	43.76	0.78	0.55	11.35	315.16
Catford town centre	0.95	1.74	0.00	5.45	8.23	2.87	19.31	0.00	1.10	0.31	39.95
Catford out of centre	0.38	2.73	2.02	16.35	12.56	7.17	12.87	0.52	3.03	4.35	61.98
Sub-total	**26.91**	**73.24**	**40.69**	**128.73**	**38.10**	**11.48**	**75.94**	**1.30**	**4.68**	**16.01**	**417.08**
Lewisham Eastern											
Blackheath	0.19	0.74	2.93	0.45	1.44	0.00	0.00	0.00	0.00	0.00	5.76
Lee Green	0.19	0.00	9.35	2.04	5.20	0.10	0.00	0.00	0.28	0.00	17.15
Sub-total	**0.38**	**0.74**	**12.28**	**2.50**	**6.64**	**0.10**	**0.00**	**0.00**	**0.28**	**0.00**	**22.92**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.58	1.43	0.00	0.00	0.00	0.00	2.01
Bell Green Retail Park	0.00	0.25	0.00	1.36	1.59	0.61	26.77	1.04	5.24	5.44	42.30
Sub-total	**0.00**	**0.25**	**0.00**	**1.36**	**2.16**	**2.05**	**26.77**	**1.04**	**5.24**	**5.44**	**44.31**
Lewisham Western											
Sydenham	0.00	0.50	0.00	0.45	0.00	0.51	29.35	1.30	1.65	2.02	35.78
Forest Hill	0.00	0.25	0.00	0.00	0.00	0.00	15.19	0.26	0.00	11.50	27.20
Sub-total	**0.00**	**0.74**	**0.00**	**0.45**	**0.00**	**0.51**	**44.53**	**1.56**	**1.65**	**13.52**	**62.98**
LB Lewisham total	**32.03**	**90.62**	**54.44**	**136.67**	**47.05**	**14.14**	**147.24**	**3.91**	**11.85**	**35.29**	**573.23**
Surrey Quays/Canda Waters	57.43	10.43	0.00	7.72	0.00	0.00	0.00	0.00	0.00	1.87	77.44
Peckham	3.60	32.52	0.00	0.45	0.00	0.00	0.00	1.04	0.28	9.95	47.84
Greenwich	7.39	1.49	17.78	5.22	1.88	0.31	1.54	1.04	2.48	0.31	39.44
Bromley	1.71	7.70	4.58	9.08	37.38	68.03	48.91	9.11	64.76	14.30	265.56
Penge	0.19	0.25	0.00	0.00	0.00	0.10	5.15	2.34	26.73	1.55	36.32
Beckenham	0.00	0.25	0.92	0.23	0.58	0.20	0.77	3.12	22.87	0.31	29.25
East Dulwich	0.00	3.48	0.00	0.00	0.00	0.00	0.00	2.08	0.00	16.79	22.35
Central London	27.86	35.01	23.64	26.79	6.06	7.38	19.56	59.63	18.46	34.35	258.74
Croydon	1.90	10.68	0.92	1.82	0.58	1.54	16.22	62.23	93.69	16.63	206.19
Bluewater	2.84	4.47	35.92	11.58	11.26	4.61	4.38	1.04	5.24	5.91	87.24
Charlton retail warehousing	2.27	1.49	16.50	0.91	8.23	0.00	0.00	0.78	0.00	0.00	30.18
Old Kent Road	30.89	41.71	0.18	1.14	0.00	0.00	0.26	0.52	0.00	3.42	78.12
Brixton	0.00	0.00	0.00	0.00	0.00	1.54	0.00	25.78	0.00	2.49	29.80
Streatham	0.00	0.00	0.00	0.00	0.14	0.00	0.00	25.26	0.00	0.00	25.40
Eltham	0.19	0.00	4.40	0.91	9.67	0.00	0.00	0.00	0.00	1.09	16.25
Stratford/Westfields	9.48	0.00	2.93	1.36	0.29	0.00	0.77	0.00	0.00	0.47	15.30
Local centres in suvrey area	0.00	0.74	4.40	4.31	2.02	0.00	5.66	35.93	18.19	2.02	73.28
Other	11.75	7.45	16.68	18.84	19.19	4.61	6.95	26.56	11.02	8.70	131.76
TOTAL	**189.53**	**248.27**	**183.29**	**227.03**	**144.31**	**102.46**	**257.41**	**260.37**	**275.56**	**155.45**	**2,043.68**

Source: Table 3 and Table 4

Table 6 - Future comparison goods market shares by zone (%) - with commitments

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Deptford	2.1%	0.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
New Cross	0.2%	5.0%	0.0%	1.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre commitments	6.0%	4.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**8.3%**	**9.9%**	**1.7%**	**1.6%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**
Lewisham Central										
Lewisham town centre	13.5%	25.9%	20.8%	47.1%	12.0%	1.4%	17.0%	0.3%	0.2%	7.3%
Catford town centre	0.5%	0.7%	0.0%	2.4%	5.7%	2.8%	7.5%	0.0%	0.4%	0.2%
Catford out of centre	0.2%	1.1%	1.1%	7.2%	8.7%	7.0%	5.0%	0.2%	1.1%	2.8%
Sub-total	**14.2%**	**27.7%**	**21.9%**	**56.7%**	**26.4%**	**11.2%**	**29.5%**	**0.5%**	**1.7%**	**10.3%**
Lewisham Eastern										
Blackheath	0.1%	0.3%	1.6%	0.2%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lee Green	0.1%	0.0%	5.1%	0.9%	3.6%	0.1%	0.0%	0.0%	0.1%	0.0%
Sub-total	**0.2%**	**0.3%**	**6.7%**	**1.1%**	**4.6%**	**0.1%**	**0.0%**	**0.0%**	**0.1%**	**0.0%**
Lewisham Southern										
Downham	0.0%	0.0%	0.0%	0.0%	0.4%	1.4%	0.0%	0.0%	0.0%	0.0%
Bell Green Retail Park	0.0%	0.1%	0.0%	0.6%	1.1%	0.6%	10.4%	0.4%	1.9%	3.5%
Sub-total	**0.0%**	**0.1%**	**0.0%**	**0.6%**	**1.5%**	**2.0%**	**10.4%**	**0.4%**	**1.9%**	**3.5%**
Lewisham Western										
Sydenham	0.0%	0.2%	0.0%	0.2%	0.0%	0.5%	11.4%	0.5%	0.6%	1.3%
Forest Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	5.9%	0.1%	0.0%	7.4%
Sub-total	**0.0%**	**0.3%**	**0.0%**	**0.2%**	**0.0%**	**0.5%**	**17.3%**	**0.6%**	**0.6%**	**8.7%**
LB Lewisham total	**22.7%**	**38.3%**	**30.3%**	**60.2%**	**32.6%**	**13.8%**	**57.2%**	**1.5%**	**4.3%**	**22.7%**
Outside LB Lewisham										
Surrey Quays/Canda Waters	27.3%	4.2%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Peckham	1.8%	12.6%	0.0%	0.2%	0.0%	0.0%	0.0%	0.4%	0.1%	6.4%
Greenwich	3.8%	0.6%	9.5%	2.3%	1.3%	0.3%	0.6%	0.4%	0.9%	0.2%
Bromley	0.9%	3.1%	2.5%	4.0%	25.9%	66.4%	19.0%	3.5%	23.5%	9.2%
Penge	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	2.0%	0.9%	9.7%	1.0%
Beckenham	0.0%	0.1%	0.5%	0.1%	0.4%	0.2%	0.3%	1.2%	8.3%	0.2%
East Dulwich	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	10.8%
Central London	13.8%	13.6%	12.7%	11.8%	4.2%	7.2%	7.6%	22.9%	6.7%	22.1%
Croydon	1.0%	4.3%	0.5%	0.8%	0.4%	1.5%	6.3%	23.9%	34.0%	10.7%
Bluewater	1.5%	1.8%	19.6%	5.1%	7.8%	4.5%	1.7%	0.4%	1.9%	3.8%
Charlton retail warehousing	1.2%	0.6%	9.0%	0.4%	5.7%	0.0%	0.0%	0.3%	0.0%	0.0%
Old Kent Road	15.3%	16.2%	0.1%	0.5%	0.0%	0.0%	0.1%	0.2%	0.0%	2.2%
Brixton	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	9.9%	0.0%	1.6%
Streatham	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	9.7%	0.0%	0.0%
Eltham	0.1%	0.0%	2.4%	0.4%	6.7%	0.0%	0.0%	0.0%	0.0%	0.7%
Stratford/Westfields	4.7%	0.0%	1.6%	0.6%	0.2%	0.0%	0.3%	0.0%	0.0%	0.3%
Local centres in survey area	0.0%	0.3%	2.4%	1.9%	1.4%	0.0%	2.2%	13.8%	6.6%	1.3%
Other	5.8%	2.8%	8.9%	8.3%	13.3%	4.5%	2.7%	10.2%	4.0%	5.6%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Lewisham Retail Capacity Study 2019 and Lichfields' analysis.

Table 7 - Future 2025 comparison goods expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2025	222.53	289.12	209.80	248.04	159.54	119.46	280.82	285.33	301.31	169.97	**2,285.91**
Lewisham Northern											
Deptford	4.67	2.60	1.47	0.00	0.00	0.00	0.00	0.00	0.00	0.34	9.08
New Cross	0.45	14.46	0.00	3.97	0.16	0.00	0.00	0.00	0.00	0.00	19.03
Out of centre commitments	13.35	11.56	2.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	27.01
Sub-total	**18.47**	**28.62**	**3.57**	**3.97**	**0.16**	**0.00**	**0.00**	**0.00**	**0.00**	**0.34**	**55.13**
Lewisham Central											
Lewisham town centre	30.04	74.88	43.64	116.83	19.14	1.67	47.74	0.86	0.60	12.41	347.81
Catford town centre	1.11	2.02	0.00	5.95	9.09	3.34	21.06	0.00	1.21	0.34	44.13
Catford out of centre	0.45	3.18	2.31	17.86	13.88	8.36	14.04	0.57	3.31	4.76	68.72
Sub-total	**31.60**	**80.09**	**45.95**	**140.64**	**42.12**	**13.38**	**82.84**	**1.43**	**5.12**	**17.51**	**460.67**
Lewisham Eastern											
Blackheath	0.22	0.87	3.36	0.50	1.60	0.00	0.00	0.00	0.00	0.00	6.54
Lee Green	0.22	0.00	10.70	2.23	5.74	0.12	0.00	0.00	0.30	0.00	19.32
Sub-total	**0.45**	**0.87**	**14.06**	**2.73**	**7.34**	**0.12**	**0.00**	**0.00**	**0.30**	**0.00**	**25.86**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.64	1.67	0.00	0.00	0.00	0.00	2.31
Bell Green Retail Park	0.00	0.29	0.00	1.49	1.75	0.72	29.21	1.14	5.72	5.95	46.27
Sub-total	**0.00**	**0.29**	**0.00**	**1.49**	**2.39**	**2.39**	**29.21**	**1.14**	**5.72**	**5.95**	**48.58**
Lewisham Western											
Sydenham	0.00	0.58	0.00	0.50	0.00	0.60	32.01	1.43	1.81	2.21	39.13
Forest Hill	0.00	0.29	0.00	0.00	0.00	0.00	16.57	0.29	0.00	12.58	29.72
Sub-total	**0.00**	**0.87**	**0.00**	**0.50**	**0.00**	**0.60**	**48.58**	**1.71**	**1.81**	**14.79**	**68.85**
LB Lewisham total	**50.51**	**110.73**	**63.57**	**149.32**	**52.01**	**16.49**	**160.63**	**4.28**	**12.96**	**38.58**	**659.08**
Outside LB Lewisham											
Surrey Quays/Canda Waters	60.75	12.14	0.00	8.43	0.00	0.00	0.00	0.00	0.00	2.04	83.37
Peckham	4.01	36.43	0.00	0.50	0.00	0.00	0.00	1.14	0.30	10.88	53.25
Greenwich	8.46	1.73	19.93	5.70	2.07	0.36	1.68	1.14	2.71	0.34	44.14
Bromley	2.00	8.96	5.25	9.92	41.32	79.32	53.36	9.99	70.81	15.64	296.56
Penge	0.22	0.29	0.00	0.00	0.00	0.12	5.62	2.57	29.23	1.70	39.74
Beckenham	0.00	0.29	1.05	0.25	0.64	0.24	0.84	3.42	25.01	0.34	32.08
East Dulwich	0.00	4.05	0.00	0.00	0.00	0.00	0.00	2.28	0.00	18.36	24.69
Central London	30.71	39.32	26.64	29.27	6.70	8.60	21.34	65.34	20.19	37.56	285.68
Croydon	2.23	12.43	1.05	1.98	0.64	1.79	17.69	68.19	102.44	18.19	226.64
Bluewater	3.34	5.20	41.12	12.65	12.44	5.38	4.77	1.14	5.72	6.46	98.23
Charlton retail warehousing	2.67	1.73	18.88	0.99	9.09	0.00	0.00	0.86	0.00	0.00	34.23
Old Kent Road	34.05	46.84	0.21	1.24	0.00	0.00	0.28	0.57	0.00	3.74	86.93
Brixton	0.00	0.00	0.00	0.00	0.00	1.79	0.00	28.25	0.00	2.72	32.76
Streatham	0.00	0.00	0.00	0.00	0.16	0.00	0.00	27.68	0.00	0.00	27.84
Eltham	0.22	0.00	5.04	0.99	10.69	0.00	0.00	0.00	0.00	1.19	18.13
Stratford/Westfields	10.46	0.00	3.36	1.49	0.32	0.00	0.84	0.00	0.00	0.51	16.98
Local centres in suvrey area	0.00	0.87	5.04	4.71	2.23	0.00	6.18	39.37	19.89	2.21	80.50
Other	12.91	8.10	18.67	20.59	21.22	5.38	7.58	29.10	12.05	9.52	145.11
TOTAL	**222.53**	**289.12**	**209.80**	**248.04**	**159.54**	**119.46**	**280.82**	**285.33**	**301.31**	**169.97**	**2,285.91**

Source: Table 3 and Table 6

Table 8 - Future 2030 comparison goods expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2030	270.23	356.83	242.81	275.48	176.38	143.26	323.35	324.18	339.86	191.32	**2,643.70**
Lewisham Northern											
Deptford	5.67	3.21	1.70	0.00	0.00	0.00	0.00	0.00	0.00	0.38	10.97
New Cross	0.54	17.84	0.00	4.41	0.18	0.00	0.00	0.00	0.00	0.00	22.97
Out of centre commitments	16.21	14.27	2.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.92
Sub-total	**22.43**	**35.33**	**4.13**	**4.41**	**0.18**	**0.00**	**0.00**	**0.00**	**0.00**	**0.38**	**66.85**
Lewisham Central											
Lewisham town centre	36.48	92.42	50.50	129.75	21.17	2.01	54.97	0.97	0.68	13.97	402.91
Catford town centre	1.35	2.50	0.00	6.61	10.05	4.01	24.25	0.00	1.36	0.38	50.52
Catford out of centre	0.54	3.93	2.67	19.83	15.34	10.03	16.17	0.65	3.74	5.36	78.26
Sub-total	**38.37**	**98.84**	**53.17**	**156.20**	**46.56**	**16.05**	**95.39**	**1.62**	**5.78**	**19.71**	**531.69**
Lewisham Eastern											
Blackheath	0.27	1.07	3.88	0.55	1.76	0.00	0.00	0.00	0.00	0.00	7.54
Lee Green	0.27	0.00	12.38	2.48	6.35	0.14	0.00	0.00	0.34	0.00	21.97
Sub-total	**0.54**	**1.07**	**16.27**	**3.03**	**8.11**	**0.14**	**0.00**	**0.00**	**0.34**	**0.00**	**29.51**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.71	2.01	0.00	0.00	0.00	0.00	2.71
Bell Green Retail Park	0.00	0.36	0.00	1.65	1.94	0.86	33.63	1.30	6.46	6.70	52.89
Sub-total	**0.00**	**0.36**	**0.00**	**1.65**	**2.65**	**2.87**	**33.63**	**1.30**	**6.46**	**6.70**	**55.60**
Lewisham Western											
Sydenham	0.00	0.71	0.00	0.55	0.00	0.72	36.86	1.62	2.04	2.49	44.99
Forest Hill	0.00	0.36	0.00	0.00	0.00	0.00	19.08	0.32	0.00	14.16	33.92
Sub-total	**0.00**	**1.07**	**0.00**	**0.55**	**0.00**	**0.72**	**55.94**	**1.95**	**2.04**	**16.64**	**78.91**
LB Lewisham total	**61.34**	**136.67**	**73.57**	**165.84**	**57.50**	**19.77**	**184.95**	**4.86**	**14.61**	**43.43**	**762.55**
Outside LB Lewisham											
Surrey Quays/Canda Waters	73.77	14.99	0.00	9.37	0.00	0.00	0.00	0.00	0.00	2.30	100.42
Peckham	4.86	44.96	0.00	0.55	0.00	0.00	0.00	1.30	0.34	12.24	64.26
Greenwich	10.27	2.14	23.07	6.34	2.29	0.43	1.94	1.30	3.06	0.38	51.21
Bromley	2.43	11.06	6.07	11.02	45.68	95.13	61.44	11.35	79.87	17.60	341.64
Penge	0.27	0.36	0.00	0.00	0.00	0.14	6.47	2.92	32.97	1.91	45.03
Beckenham	0.00	0.36	1.21	0.28	0.71	0.29	0.97	3.89	28.21	0.38	36.29
East Dulwich	0.00	5.00	0.00	0.00	0.00	0.00	0.00	2.59	0.00	20.66	28.25
Central London	37.29	48.53	30.84	32.51	7.41	10.31	24.57	74.24	22.77	42.28	330.75
Croydon	2.70	15.34	1.21	2.20	0.71	2.15	20.37	77.48	115.55	20.47	258.19
Bluewater	4.05	6.42	47.59	14.05	13.76	6.45	5.50	1.30	6.46	7.27	112.84
Charlton retail warehousing	3.24	2.14	21.85	1.10	10.05	0.00	0.00	0.97	0.00	0.00	39.36
Old Kent Road	41.35	57.81	0.24	1.38	0.00	0.00	0.32	0.65	0.00	4.21	105.95
Brixton	0.00	0.00	0.00	0.00	0.00	2.15	0.00	32.09	0.00	3.06	37.30
Streatham	0.00	0.00	0.00	0.00	0.18	0.00	0.00	31.45	0.00	0.00	31.62
Eltham	0.27	0.00	5.83	1.10	11.82	0.00	0.00	0.00	0.00	1.34	20.36
Stratford/Westfields	12.70	0.00	3.88	1.65	0.35	0.00	0.97	0.00	0.00	0.57	20.14
Local centres in suvrey area	0.00	1.07	5.83	5.23	2.47	0.00	7.11	44.74	22.43	2.49	91.37
Other	15.67	9.99	21.61	22.87	23.46	6.45	8.73	33.07	13.59	10.71	166.15
TOTAL	**270.23**	**356.83**	**242.81**	**275.48**	**176.38**	**143.26**	**323.35**	**324.18**	**339.86**	**191.32**	**2,643.70**

Source: Table 3 and Table 6

Table 9 - Future 2035 comparison goods expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	324.29	441.40	281.52	314.29	202.96	165.12	386.09	377.36	391.82	219.84	**3,104.69**
Lewisham Northern											
Deptford	6.81	3.97	1.97	0.00	0.00	0.00	0.00	0.00	0.00	0.44	13.19
New Cross	0.65	22.07	0.00	5.03	0.20	0.00	0.00	0.00	0.00	0.00	27.95
Out of centre commitments	19.46	17.66	2.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	39.93
Sub-total	**26.92**	**43.70**	**4.79**	**5.03**	**0.20**	**0.00**	**0.00**	**0.00**	**0.00**	**0.44**	**81.07**
Lewisham Central											
Lewisham town centre	43.78	114.32	58.56	148.03	24.36	2.31	65.64	1.13	0.78	16.05	474.95
Catford town centre	1.62	3.09	0.00	7.54	11.57	4.62	28.96	0.00	1.57	0.44	59.41
Catford out of centre	0.65	4.86	3.10	22.63	17.66	11.56	19.30	0.75	4.31	6.16	90.97
Sub-total	**46.05**	**122.27**	**61.65**	**178.20**	**53.58**	**18.49**	**113.90**	**1.89**	**6.66**	**22.64**	**625.33**
Lewisham Eastern											
Blackheath	0.32	1.32	4.50	0.63	2.03	0.00	0.00	0.00	0.00	0.00	8.81
Lee Green	0.32	0.00	14.36	2.83	7.31	0.17	0.00	0.00	0.39	0.00	25.37
Sub-total	**0.65**	**1.32**	**18.86**	**3.46**	**9.34**	**0.17**	**0.00**	**0.00**	**0.39**	**0.00**	**34.18**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.81	2.31	0.00	0.00	0.00	0.00	3.12
Bell Green Retail Park	0.00	0.44	0.00	1.89	2.23	0.99	40.15	1.51	7.44	7.69	62.35
Sub-total	**0.00**	**0.44**	**0.00**	**1.89**	**3.04**	**3.30**	**40.15**	**1.51**	**7.44**	**7.69**	**65.48**
Lewisham Western											
Sydenham	0.00	0.88	0.00	0.63	0.00	0.83	44.01	1.89	2.35	2.86	53.45
Forest Hill	0.00	0.44	0.00	0.00	0.00	0.00	22.78	0.38	0.00	16.27	39.87
Sub-total	**0.00**	**1.32**	**0.00**	**0.63**	**0.00**	**0.83**	**66.79**	**2.26**	**2.35**	**19.13**	**93.31**
LB Lewisham total	**73.61**	**169.06**	**85.30**	**189.20**	**66.17**	**22.79**	**220.84**	**5.66**	**16.85**	**49.90**	**899.38**
Outside LB Lewisham											
Surrey Quays/Canda Waters	88.53	18.54	0.00	10.69	0.00	0.00	0.00	0.00	0.00	2.64	120.39
Peckham	5.84	55.62	0.00	0.63	0.00	0.00	0.00	1.51	0.39	14.07	78.05
Greenwich	12.32	2.65	26.74	7.23	2.64	0.50	2.32	1.51	3.53	0.44	59.87
Bromley	2.92	13.68	7.04	12.57	52.57	109.64	73.36	13.21	92.08	20.23	397.29
Penge	0.32	0.44	0.00	0.00	0.00	0.17	7.72	3.40	38.01	2.20	52.25
Beckenham	0.00	0.44	1.41	0.31	0.81	0.33	1.16	4.53	32.52	0.44	41.95
East Dulwich	0.00	6.18	0.00	0.00	0.00	0.00	0.00	3.02	0.00	23.74	32.94
Central London	44.75	60.03	35.75	37.09	8.52	11.89	29.34	86.41	26.25	48.59	388.63
Croydon	3.24	18.98	1.41	2.51	0.81	2.48	24.32	90.19	133.22	23.52	300.69
Bluewater	4.86	7.95	55.18	16.03	15.83	7.43	6.56	1.51	7.44	8.35	131.15
Charlton retail warehousing	3.89	2.65	25.34	1.26	11.57	0.00	0.00	1.13	0.00	0.00	45.83
Old Kent Road	49.62	71.51	0.28	1.57	0.00	0.00	0.39	0.75	0.00	4.84	128.95
Brixton	0.00	0.00	0.00	0.00	0.00	2.48	0.00	37.36	0.00	3.52	43.35
Streatham	0.00	0.00	0.00	0.00	0.20	0.00	0.00	36.60	0.00	0.00	36.81
Eltham	0.32	0.00	6.76	1.26	13.60	0.00	0.00	0.00	0.00	1.54	23.48
Stratford/Westfields	15.24	0.00	4.50	1.89	0.41	0.00	1.16	0.00	0.00	0.66	23.86
Local centres in suvrey area	0.00	1.32	6.76	5.97	2.84	0.00	8.49	52.08	25.86	2.86	106.18
Other	18.81	12.36	25.06	26.09	26.99	7.43	10.42	38.49	15.67	12.31	193.63
TOTAL	**324.29**	**441.40**	**281.52**	**314.29**	**202.96**	**165.12**	**386.09**	**377.36**	**391.82**	**219.84**	**3,104.69**

Source: Table 3 and Table 6

Table 10 - Future 2040 comparison goods expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2040	384.28	528.48	333.26	365.55	234.32	194.50	448.47	443.05	459.99	258.39	**3,650.30**
Lewisham Northern											
Deptford	8.07	4.76	2.33	0.00	0.00	0.00	0.00	0.00	0.00	0.52	15.68
New Cross	0.77	26.42	0.00	5.85	0.23	0.00	0.00	0.00	0.00	0.00	33.28
Out of centre commitments	23.06	21.14	3.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.53
Sub-total	**31.90**	**52.32**	**5.67**	**5.85**	**0.23**	**0.00**	**0.00**	**0.00**	**0.00**	**0.52**	**96.48**
Lewisham Central											
Lewisham town centre	51.88	136.88	69.32	172.18	28.12	2.72	76.24	1.33	0.92	18.86	558.44
Catford town centre	1.92	3.70	0.00	8.77	13.36	5.45	33.64	0.00	1.84	0.52	69.19
Catford out of centre	0.77	5.81	3.67	26.32	20.39	13.62	22.42	0.89	5.06	7.24	106.17
Sub-total	**54.57**	**146.39**	**72.98**	**207.27**	**61.86**	**21.78**	**132.30**	**2.22**	**7.82**	**26.61**	**733.80**
Lewisham Eastern											
Blackheath	0.38	1.59	5.33	0.73	2.34	0.00	0.00	0.00	0.00	0.00	10.38
Lee Green	0.38	0.00	17.00	3.29	8.44	0.19	0.00	0.00	0.46	0.00	29.76
Sub-total	**0.77**	**1.59**	**22.33**	**4.02**	**10.78**	**0.19**	**0.00**	**0.00**	**0.46**	**0.00**	**40.14**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.94	2.72	0.00	0.00	0.00	0.00	3.66
Bell Green Retail Park	0.00	0.53	0.00	2.19	2.58	1.17	46.64	1.77	8.74	9.04	72.66
Sub-total	**0.00**	**0.53**	**0.00**	**2.19**	**3.51**	**3.89**	**46.64**	**1.77**	**8.74**	**9.04**	**76.32**
Lewisham Western											
Sydenham	0.00	1.06	0.00	0.73	0.00	0.97	51.13	2.22	2.76	3.36	62.22
Forest Hill	0.00	0.53	0.00	0.00	0.00	0.00	26.46	0.44	0.00	19.12	46.55
Sub-total	**0.00**	**1.59**	**0.00**	**0.73**	**0.00**	**0.97**	**77.59**	**2.66**	**2.76**	**22.48**	**108.77**
LB Lewisham total	**87.23**	**202.41**	**100.98**	**220.06**	**76.39**	**26.84**	**256.53**	**6.65**	**19.78**	**58.66**	**1,055.52**
Outside LB Lewisham											
Surrey Quays/Canda Waters	104.91	22.20	0.00	12.43	0.00	0.00	0.00	0.00	0.00	3.10	142.63
Peckham	6.92	66.59	0.00	0.73	0.00	0.00	0.00	1.77	0.46	16.54	93.01
Greenwich	14.60	3.17	31.66	8.41	3.05	0.58	2.69	1.77	4.14	0.52	70.59
Bromley	3.46	16.38	8.33	14.62	60.69	129.15	85.21	15.51	108.10	23.77	465.22
Penge	0.38	0.53	0.00	0.00	0.00	0.19	8.97	3.99	44.62	2.58	61.27
Beckenham	0.00	0.53	1.67	0.37	0.94	0.39	1.35	5.32	38.18	0.52	49.24
East Dulwich	0.00	7.40	0.00	0.00	0.00	0.00	0.00	3.54	0.00	27.91	38.85
Central London	53.03	71.87	42.32	43.14	9.84	14.00	34.08	101.46	30.82	57.11	457.68
Croydon	3.84	22.72	1.67	2.92	0.94	2.92	28.25	105.89	156.40	27.65	353.20
Bluewater	5.76	9.51	65.32	18.64	18.28	8.75	7.62	1.77	8.74	9.82	154.22
Charlton retail warehousing	4.61	3.17	29.99	1.46	13.36	0.00	0.00	1.33	0.00	0.00	53.92
Old Kent Road	58.80	85.61	0.33	1.83	0.00	0.00	0.45	0.89	0.00	5.68	153.59
Brixton	0.00	0.00	0.00	0.00	0.00	2.92	0.00	43.86	0.00	4.13	50.91
Streatham	0.00	0.00	0.00	0.00	0.23	0.00	0.00	42.98	0.00	0.00	43.21
Eltham	0.38	0.00	8.00	1.46	15.70	0.00	0.00	0.00	0.00	1.81	27.35
Stratford/Westfields	18.06	0.00	5.33	2.19	0.47	0.00	1.35	0.00	0.00	0.78	28.18
Local centres in suvrey area	0.00	1.59	8.00	6.95	3.28	0.00	9.87	61.14	30.36	3.36	124.53
Other	22.29	14.80	29.66	30.34	31.16	8.75	12.11	45.19	18.40	14.47	227.17
TOTAL	**384.28**	**528.48**	**333.26**	**365.55**	**234.32**	**194.50**	**448.47**	**443.05**	**459.99**	**258.39**	**3,650.30**

Source: Table 3 and Table 6

Table 11 - Comparison goods sales floorspace

	Sales florpsace sq.m net
In-centre floorspace	
Lewisham town centre	28,277
Catford town centre	12,361
Blackheath district centre	2,705
Deptford district centre	6,171
Downham district centre	1,806
Forest Hill district centre	3,015
Lee Green district centre	1,901
New Cross distriict centre	2,462
Sydenham district centre	4,790
Sub-total	**63,488**
Edge/out of centre floorspace	
Ravensbourne Retail Park	5,871
Bell Green retail warehousing	15,212
Catford Bridge retail warehousing	4,108
New Cross Gate retail warehousing	2,431
Homebase/Argos, Bromley Road	2,115
Sub-total	**29,737**
Total	**93,225**

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Table 12 - Commitments for new comparison goods sales floorspace

Scheme	Maximum proposed floorspace sq.m gross	Estmated % comparison retail	Comparison floorspace sq.m gross	Sale floorspace sq.m net
Lewisham Gateway (Phase 2)	4,381	50%	2,191	1,752
Carpetright site, Lewisham	960	30%	288	230
New Bermondsey / Surrey Canal Triangle	6,300	32%	2,000	1,600
Convoys Wharf	10,330	30%	3,099	2,479
Oxestalls Road, Deptford	3,571	40%	1,428	1,143
Leegate Centre	3,950	40%	1,580	1,264
Leegate Centre (loss)	-1,000	40%	-400	-320
Sub-total	**28,492**		**10,186**	**8,149**

Source: Planning application details.

Table 13 - Summary of comparison goods expenditure 2021 to 2040 (£M)

	2021	2025	2030	2035	2040
Available expenditure					
Lewisham Northern - Deptford/New Cross	25.93	55.13	66.85	81.07	96.48
Lewisham Central - Lewisham/Catford	417.08	460.67	531.69	625.33	733.80
Lewisham Eastern - Lee/Blackheath	22.92	25.86	29.51	34.18	40.14
Lewisham Southern - Bell Green/Downham	44.31	48.58	55.60	65.48	76.32
Lewisham Western - Forest Hill/Sydenham	62.98	68.85	78.91	93.31	108.77
Total	**573.23**	**659.08**	**762.55**	**899.38**	**1,055.52**
Turnover of existing facilities					
Lewisham Northern - Deptford/New Cross	25.93	29.61	33.93	38.58	43.86
Lewisham Central - Lewisham/Catford	417.08	476.26	545.71	620.44	705.40
Lewisham Eastern - Lee/Blackheath	22.92	26.17	29.99	34.09	38.76
Lewisham Southern - Bell Green/Downham	44.31	50.60	57.98	65.92	74.95
Lewisham Western - Forest Hill/Sydenham	62.98	71.92	82.41	93.69	106.52
Total	**573.23**	**654.57**	**750.02**	**852.72**	**969.49**
Turnover of commitments					
Lewisham Northern - Deptford/New Cross	0.00	35.78	40.99	46.61	52.99
Lewisham Central - Lewisham/Catford	0.00	13.58	15.57	17.70	20.12
Lewisham Eastern - Lee/Blackheath	0.00	6.47	7.41	8.43	9.58
Lewisham Southern - Bell Green/Downham	0.00	0.00	0.00	0.00	0.00
Lewisham South - Forest Hill/Sydenham	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**55.83**	**63.97**	**72.73**	**82.69**
Surplus/deficit expenditure £M					
Lewisham Northern - Deptford/New Cross	0.00	-10.26	-8.07	-4.11	-0.37
Lewisham Central - Lewisham/Catford	0.00	-29.18	-29.59	-12.80	8.28
Lewisham Eastern - Lee/Blackheath	0.00	-6.78	-7.89	-8.33	-8.20
Lewisham Southern - Bell Green/Downham	0.00	-2.02	-2.38	-0.44	1.38
Lewisham Western - Forest Hill/Sydenham	0.00	-3.07	-3.50	-0.38	2.25
Total	**0.00**	**-51.31**	**-51.43**	**-26.07**	**3.34**

Source: Tables 5 to 12

Table 14 - Comparison goods floorspace capacity up to 2040

	2021	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,851	£7,850	£8,925	£10,148
Floorspace projection (sq.m net)					
Lewisham Northern - Deptford/New Cross	0	-1,498	-1,028	-461	-36
Lewisham Central - Lewisham/Catford	0	-4,259	-3,769	-1,434	816
Lewisham Eastern - Lee/Blackheath	0	-990	-1,005	-934	-808
Lewisham Southern - Bell Green/Downham	0	-295	-303	-50	136
Lewisham Western - Forest Hill/Sydenham	0	-448	-446	-43	222
Total	**0**	**-7,489**	**-6,552**	**-2,921**	**329**
Floorspace Projection (sq.m gross)					
Lewisham Northern - Deptford/New Cross	0	-1,872	-1,286	-576	-45
Lewisham Central - Lewisham/Catford	0	-5,324	-4,711	-1,793	1,020
Lewisham Eastern - Lee/Blackheath	0	-1,237	-1,256	-1,167	-1,010
Lewisham Southern - Bell Green/Downham	0	-369	-379	-62	170
Lewisham Western - Forest Hill/Sydenham	0	-560	-558	-53	277
Total	**0**	**-9,362**	**-8,190**	**-3,651**	**411**

Source: Table 13

Table 15 - Summary of comparison goods expenditure 2021 to 2040 (£M) - without retail warehouses

	2021	2025	2030	2035	2040
Available expenditure					
Lewisham Northern - Deptford/New Cross	25.93	47.05	57.08	69.17	82.30
Lewisham Central - Lewisham/Catford	417.08	423.39	489.24	576.35	676.57
Lewisham Eastern - Lee/Blackheath	22.92	27.11	30.91	35.80	42.02
Lewisham Southern - Bell Green/Downham	44.31	2.52	2.95	3.40	3.99
Lewisham Western - Forest Hill/Sydenham	62.98	78.88	90.43	107.01	124.71
Total	**573.23**	**578.95**	**670.61**	**791.73**	**929.58**
Turnover of existing facilities					
Lewisham Northern - Deptford/New Cross	25.93	19.73	22.60	25.70	29.22
Lewisham Central - Lewisham/Catford	417.08	405.49	464.62	528.25	600.58
Lewisham Eastern - Lee/Blackheath	22.92	26.17	29.99	34.09	38.76
Lewisham Southern - Bell Green/Downham	44.31	2.30	2.63	2.99	3.40
Lewisham Western - Forest Hill/Sydenham	62.98	71.92	82.41	93.69	106.52
Total	**573.23**	**525.61**	**602.25**	**684.72**	**778.49**
Turnover of commitments					
Lewisham Northern - Deptford/New Cross	0.00	35.78	40.99	46.61	52.99
Lewisham Central - Lewisham/Catford	0.00	13.58	15.57	17.70	20.12
Lewisham Eastern - Lee/Blackheath	0.00	6.47	7.41	8.43	9.58
Lewisham Southern - Bell Green/Downham	0.00	0.00	0.00	0.00	0.00
Lewisham South - Forest Hill/Sydenham	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**55.83**	**63.97**	**72.73**	**82.69**
Surplus/deficit expenditure £M					
Lewisham Northern - Deptford/New Cross	0.00	-8.46	-6.52	-3.14	0.10
Lewisham Central - Lewisham/Catford	0.00	4.32	9.06	30.40	55.87
Lewisham Eastern - Lee/Blackheath	0.00	-5.52	-6.49	-6.72	-6.32
Lewisham Southern - Bell Green/Downham	0.00	0.22	0.32	0.41	0.58
Lewisham Western - Forest Hill/Sydenham	0.00	6.96	8.02	13.32	18.19
Total	**0.00**	**-2.49**	**4.39**	**34.28**	**68.41**

Table 16 - Comparison goods floorspace capacity up to 2040 - without retail warehouses

	2021	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,851	£7,850	£8,925	£10,148
Floorspace projection (sq.m net)					
Lewisham Northern - Deptford/New Cross	0	-1,234	-830	-352	9
Lewisham Central - Lewisham/Catford	0	630	1,154	3,406	5,505
Lewisham Eastern - Lee/Blackheath	0	-806	-826	-752	-623
Lewisham Southern - Bell Green/Downham	0	32	41	46	58
Lewisham Western - Forest Hill/Sydenham	0	1,015	1,022	1,492	1,792
Total	**0**	**-363**	**560**	**3,841**	**6,741**
Floorspace Projection (sq.m gross)					
Lewisham Northern - Deptford/New Cross	0	-1,543	-1,038	-440	12
Lewisham Central - Lewisham/Catford	0	787	1,442	4,258	6,882
Lewisham Eastern - Lee/Blackheath	0	-1,008	-1,033	-941	-779
Lewisham Southern - Bell Green/Downham	0	40	51	57	72
Lewisham Western - Forest Hill/Sydenham	0	1,269	1,277	1,866	2,240
Total	**0**	**-454**	**700**	**4,801**	**8,426**

Appendix 4 Food/beverage assessment

Table 1 - Study area population projections

Zone	2019	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	80,681	83,403	89,543	97,031	102,616	106,292
2 - New Cross/Southwark (east)	108,043	110,253	117,402	129,296	140,952	147,513
3 - Lewisham Central	64,838	64,021	67,006	69,199	70,706	73,164
4 - Blackheath/Greenwich (west)	68,256	67,710	67,642	67,039	67,401	68,526
5 - Lee Green/Grove Park	54,736	53,862	54,446	53,712	54,470	54,970
6 - Bromley/Downham	30,318	31,364	33,437	35,781	36,345	37,422
7 - Catford/Sydenham	93,370	92,853	92,622	95,168	100,143	101,678
8 - Crystal Palace/ West Norwood	95,126	95,334	95,526	96,850	99,352	101,962
9 - Beckenham/ South Norwood	91,862	91,685	91,668	92,268	93,744	96,198
10 - Forest Hill/Southwark (south)	44,925	45,381	45,372	45,574	46,150	47,414
Total	**732,155**	**735,865**	**754,664**	**781,918**	**811,880**	**835,139**

Sources:
Experian popluation for zones at 2019
GLA ward level population projections - 2019-based BPO Draft, Local Plan scenario 1 standard projection for LB of Lewisham.
GLA ward level population projections - housing led 2018 for areas outside LB Lewisham.

Table 2 - Food/beverage expenditure per person per annum (£)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	1,364	1,706	1,856	1,941	2,030
2 - New Cross/Southwark (east)	1,138	1,423	1,548	1,619	1,693
3 - Lewisham Central	1,523	1,904	2,071	2,166	2,266
4 - Blackheath/Greenwich (west)	1,691	2,115	2,300	2,406	2,516
5 - Lee Green/Grove Park	1,049	1,312	1,427	1,492	1,560
6 - Bromley/Downham	1,336	1,671	1,818	1,901	1,988
7 - Catford/Sydenham	1,240	1,550	1,686	1,764	1,844
8 - Crystal Palace/ West Norwood	1,269	1,588	1,727	1,806	1,889
9 - Beckenham/ South Norwood	1,345	1,682	1,829	1,913	2,001
10 - Forest Hill/Southwark (south)	1,665	2,082	2,265	2,369	2,477

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Briefing Note 18 (October 2020)

Table 3 - Total food/beverage expenditure (£m)

Zone	2021	2025	2030	2035	2040
1 - Deptford/Southwark (north east)	113.79	152.80	180.10	199.20	215.78
2 - New Cross/Southwark (east)	125.42	167.05	200.10	228.14	249.70
3 - Lewisham Central	97.48	127.61	143.34	153.18	165.76
4 - Blackheath/Greenwich (west)	114.48	143.05	154.20	162.14	172.40
5 - Lee Green/Grove Park	56.48	71.41	76.62	81.26	85.77
6 - Bromley/Downham	41.91	55.88	65.04	69.10	74.40
7 - Catford/Sydenham	115.09	143.60	160.49	176.61	187.54
8 - Crystal Palace/ West Norwood	121.00	151.65	167.23	179.41	192.56
9 - Beckenham/ South Norwood	123.27	154.16	168.78	179.33	192.46
10 - Forest Hill/Southwark (south)	75.55	94.48	103.23	109.32	117.46
Total	**984.47**	**1,261.70**	**1,419.14**	**1,537.69**	**1,653.83**

Source: Tables 1 and 2

Table 4 - Base year 2021 food beverage market shares by zone (%)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Deptford DC	1.9%	8.2%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
New Cross DC	0.0%	3.7%	0.0%	2.2%	0.0%	0.0%	0.0%	1.2%	1.4%	0.0%
Other LB Lewisham (north)	0.0%	1.4%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**1.9%**	**13.3%**	**0.0%**	**2.8%**	**2.0%**	**0.0%**	**0.0%**	**1.2%**	**1.4%**	**0.0%**
Lewisham Central										
Lewisham town centre	3.7%	10.0%	5.1%	15.6%	1.7%	0.0%	0.0%	0.0%	0.4%	1.8%
Catford town centre	0.0%	1.9%	0.0%	0.6%	5.2%	0.5%	4.6%	0.0%	0.0%	1.5%
Other LB Lewisham (central)	0.7%	9.5%	2.9%	31.6%	4.1%	0.0%	5.3%	8.2%	0.5%	5.9%
Sub-total	**4.4%**	**21.4%**	**8.0%**	**47.8%**	**11.0%**	**0.5%**	**9.9%**	**8.2%**	**0.9%**	**9.2%**
Lewisham Eastern										
Blackheath DC	3.4%	2.1%	41.8%	23.5%	15.6%	1.2%	0.5%	0.0%	0.0%	0.0%
Lee Green DC	0.0%	0.5%	6.2%	0.3%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.4%**	**2.6%**	**48.0%**	**23.8%**	**24.4%**	**1.2%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**
Lewisham Southern										
Downham DC	0.0%	0.0%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Other LB Lewisham (south)	0.0%	3.2%	0.0%	0.0%	1.5%	0.5%	5.1%	0.0%	0.0%	2.8%
Sub-total	**0.0%**	**3.2%**	**0.0%**	**0.4%**	**1.9%**	**0.5%**	**5.1%**	**0.0%**	**0.0%**	**2.8%**
Lewisham Western										
Sydenham DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.9%	0.0%	0.3%	0.0%
Forest Hill DC	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	16.3%	3.4%	0.0%	21.2%
Sub-total	**0.0%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**35.2%**	**3.4%**	**0.3%**	**21.2%**
LB Lewisham total	**9.7%**	**41.0%**	**56.0%**	**74.8%**	**39.3%**	**2.2%**	**50.7%**	**12.8%**	**2.6%**	**33.2%**
Outside LB Lewisham										
Surrey Quays/Canda Waters	37.5%	2.7%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Bermondsey	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Peckham	0.7%	18.6%	0.4%	2.0%	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%
West Norwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	11.5%	0.7%	0.0%
Greenwich	7.7%	5.7%	25.1%	5.2%	6.9%	0.0%	3.8%	1.2%	0.0%	0.5%
Bromley	2.3%	2.0%	0.0%	2.5%	21.1%	75.2%	6.0%	0.8%	2.7%	0.7%
Crystal Palace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	16.9%	22.4%	0.8%
Penge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.5%	4.4%	0.0%
Beckenham	0.0%	0.0%	0.0%	0.0%	3.3%	3.9%	10.1%	0.9%	30.2%	1.6%
Dulwich Village	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	1.0%	3.7%
East Dulwich	0.0%	7.3%	0.0%	1.0%	0.0%	0.0%	0.0%	1.7%	0.0%	38.5%
Central London	24.1%	10.5%	10.4%	9.2%	14.9%	14.5%	13.2%	26.7%	16.4%	15.7%
Croydon	0.0%	0.5%	0.0%	0.0%	1.3%	0.0%	0.6%	1.6%	9.7%	0.0%
Brixton	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	0.5%	0.5%
Streatham	0.0%	0.5%	0.0%	0.0%	1.1%	0.0%	0.0%	6.6%	0.0%	0.0%
Eltham	0.4%	0.0%	2.6%	0.8%	0.9%	0.0%	0.0%	0.0%	0.0%	1.5%
Other	13.2%	9.3%	5.5%	4.5%	11.2%	2.3%	3.5%	7.7%	9.4%	1.9%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey September 2015 and Lichfields' analysis.

Table 5 - Base year 2021 food beverage expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2021	113.79	125.42	97.48	114.48	56.48	41.91	115.09	121.00	123.27	75.55	**984.47**
Lewisham Northern											
Deptford DC	2.16	10.28	0.00	0.69	0.85	0.00	0.00	0.00	0.00	0.00	13.98
New Cross DC	0.00	4.64	0.00	2.52	0.00	0.00	0.00	1.45	1.73	0.00	10.34
Other LB Lewisham (north)	0.00	1.76	0.00	0.00	0.28	0.00	0.00	0.00	0.00	0.00	2.04
Sub-total	**2.16**	**16.68**	**0.00**	**3.21**	**1.13**	**0.00**	**0.00**	**1.45**	**1.73**	**0.00**	**26.36**
Lewisham Central											
Lewisham town centre	4.21	12.54	4.97	17.86	0.96	0.00	0.00	0.00	0.49	1.36	42.40
Catford town centre	0.00	2.38	0.00	0.69	2.94	0.21	5.29	0.00	0.00	1.13	12.64
Other LB Lewisham (central)	0.80	11.91	2.83	36.18	2.32	0.00	6.10	9.92	0.62	4.46	75.13
Sub-total	**5.01**	**26.84**	**7.80**	**54.72**	**6.21**	**0.21**	**11.39**	**9.92**	**1.11**	**6.95**	**130.17**
Lewisham Eastern											
Blackheath DC	3.87	2.63	40.75	26.90	8.81	0.50	0.58	0.00	0.00	0.00	84.04
Lee Green DC	0.00	0.63	6.04	0.34	4.97	0.00	0.00	0.00	0.00	0.00	11.98
Sub-total	**3.87**	**3.26**	**46.79**	**27.25**	**13.78**	**0.50**	**0.58**	**0.00**	**0.00**	**0.00**	**96.02**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.46	0.23	0.00	0.00	0.00	0.00	0.00	0.68
Other LB Lewisham (south)	0.00	4.01	0.00	0.00	0.85	0.21	5.87	0.00	0.00	2.12	13.06
Sub-total	**0.00**	**4.01**	**0.00**	**0.46**	**1.07**	**0.21**	**5.87**	**0.00**	**0.00**	**2.12**	**13.74**
Lewisham Western											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	21.75	0.00	0.37	0.00	22.12
Forest Hill DC	0.00	0.63	0.00	0.00	0.00	0.00	18.76	4.11	0.00	16.02	39.52
Sub-total	**0.00**	**0.63**	**0.00**	**0.00**	**0.00**	**0.00**	**40.51**	**4.11**	**0.37**	**16.02**	**61.64**
LB Lewisham total	**11.04**	**51.42**	**54.59**	**85.63**	**22.20**	**0.92**	**58.35**	**15.49**	**3.21**	**25.08**	**327.93**
Outside LB Lewisham											
Surrey Quays/Canda Waters	42.67	3.39	0.00	0.00	0.00	0.00	0.69	0.00	0.00	0.00	46.75
Bermondsey	3.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.87
Peckham	0.80	23.33	0.39	2.29	0.00	0.59	0.00	0.00	0.00	1.06	28.45
West Norwood	0.00	0.00	0.00	0.00	0.00	0.21	0.00	13.91	0.86	0.00	14.99
Greenwich	8.76	7.15	24.47	5.95	3.90	0.00	4.37	1.45	0.00	0.38	56.43
Bromley	2.62	2.51	0.00	2.86	11.92	31.51	6.91	0.97	3.33	0.53	63.15
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	12.66	20.45	27.61	0.60	61.33
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.60	5.42	0.00	6.60
Beckenham	0.00	0.00	0.00	0.00	1.86	1.63	11.62	1.09	37.23	1.21	54.65
Dulwich Village	0.00	2.38	0.00	0.00	0.00	0.00	0.00	4.72	1.23	2.80	11.13
East Dulwich	0.00	9.16	0.00	1.14	0.00	0.00	0.00	2.06	0.00	29.09	41.45
Central London	27.42	13.17	10.14	10.53	8.42	6.08	15.19	32.31	20.22	11.86	155.33
Croydon	0.00	0.63	0.00	0.00	0.73	0.00	0.69	1.94	11.96	0.00	15.95
Brixton	1.14	0.00	0.00	0.00	0.00	0.00	0.00	8.71	0.62	0.38	10.84
Streatham	0.00	0.63	0.00	0.00	0.62	0.00	0.00	7.99	0.00	0.00	9.23
Eltham	0.46	0.00	2.53	0.92	0.51	0.00	0.00	0.00	0.00	1.13	5.55
Other	15.02	11.66	5.36	5.15	6.33	0.96	4.03	9.32	11.59	1.44	70.85
TOTAL	**113.79**	**125.42**	**97.48**	**114.48**	**56.48**	**41.91**	**115.09**	**121.00**	**123.27**	**75.55**	**984.47**

Source: Table 3 and 4

Table 6 - Future food beverage market shares by zone (%)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10
Lewisham Northern										
Deptford DC	1.8%	8.0%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
New Cross DC	0.0%	3.6%	0.0%	2.2%	0.0%	0.0%	0.0%	1.2%	1.4%	0.0%
Other LB Lewisham (north)	0.0%	1.4%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre commitments	15.0%	5.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**16.8%**	**18.0%**	**1.0%**	**2.8%**	**2.0%**	**0.0%**	**0.0%**	**1.2%**	**1.4%**	**0.0%**
Lewisham Central										
Lewisham town centre	3.6%	9.0%	5.1%	15.6%	1.7%	0.0%	0.0%	0.0%	0.4%	1.8%
Catford town centre	0.0%	1.9%	0.0%	0.6%	5.2%	0.5%	4.6%	0.0%	0.0%	1.5%
Other LB Lewisham (central)	0.6%	9.4%	2.9%	31.6%	4.1%	0.0%	5.3%	8.2%	0.5%	5.9%
Sub-total	**4.2%**	**20.3%**	**8.0%**	**47.8%**	**11.0%**	**0.5%**	**9.9%**	**8.2%**	**0.9%**	**9.2%**
Lewisham Eastern										
Blackheath DC	3.3%	2.0%	41.4%	23.5%	15.6%	1.2%	0.5%	0.0%	0.0%	0.0%
Lee Green DC	0.0%	0.5%	6.1%	0.3%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.3%**	**2.5%**	**47.5%**	**23.8%**	**24.4%**	**1.2%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**
Lewisham Southern										
Downham DC	0.0%	0.0%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Other LB Lewisham (south)	0.0%	3.2%	0.0%	0.0%	1.5%	0.5%	5.1%	0.0%	0.0%	2.8%
Sub-total	**0.0%**	**3.2%**	**0.0%**	**0.4%**	**1.9%**	**0.5%**	**5.1%**	**0.0%**	**0.0%**	**2.8%**
Lewisham Western										
Sydenham DC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.9%	0.0%	0.3%	0.0%
Forest Hill DC	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	16.3%	3.4%	0.0%	21.2%
Sub-total	**0.0%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**35.2%**	**3.4%**	**0.3%**	**21.2%**
LB Lewisham total	**24.3%**	**44.5%**	**56.5%**	**74.8%**	**39.3%**	**2.2%**	**50.7%**	**12.8%**	**2.6%**	**33.2%**
Outside LB Lewisham										
Surrey Quays/Canda Waters	27.5%	2.6%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Bermondsey	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Peckham	0.6%	17.4%	0.4%	2.0%	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%
West Norwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	11.5%	0.7%	0.0%
Greenwich	7.5%	5.6%	24.6%	5.2%	6.9%	0.0%	3.8%	1.2%	0.0%	0.5%
Bromley	2.3%	2.0%	0.0%	2.5%	21.1%	75.2%	6.0%	0.8%	2.7%	0.7%
Crystal Palace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	16.9%	22.4%	0.8%
Penge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.5%	4.4%	0.0%
Beckenham	0.0%	0.0%	0.0%	0.0%	3.3%	3.9%	10.1%	0.9%	30.2%	1.6%
Dulwich Village	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	1.0%	3.7%
East Dulwich	0.0%	7.0%	0.0%	1.0%	0.0%	0.0%	0.0%	1.7%	0.0%	38.5%
Central London	20.0%	9.5%	10.4%	9.2%	14.9%	14.5%	13.2%	26.7%	16.4%	15.7%
Croydon	0.0%	0.5%	0.0%	0.0%	1.3%	0.0%	0.6%	1.6%	9.7%	0.0%
Brixton	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	0.5%	0.5%
Streatham	0.0%	0.5%	0.0%	0.0%	1.1%	0.0%	0.0%	6.6%	0.0%	0.0%
Eltham	0.4%	0.0%	2.6%	0.8%	0.9%	0.0%	0.0%	0.0%	0.0%	1.5%
Other	13.2%	8.5%	5.5%	4.5%	11.2%	2.3%	3.5%	7.7%	9.4%	1.9%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey September 2015 and Lichfields' analysis.

Table 7 - Future 2025 food beverage expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2025	152.80	167.05	127.61	143.05	71.41	55.88	143.60	151.65	154.16	94.48	**1,261.70**
Lewisham Northern											
Deptford DC	2.75	13.36	0.00	0.86	1.07	0.00	0.00	0.00	0.00	0.00	18.04
New Cross DC	0.00	6.01	0.00	3.15	0.00	0.00	0.00	1.82	2.16	0.00	13.14
Other LB Lewisham (north)	0.00	2.34	0.00	0.00	0.36	0.00	0.00	0.00	0.00	0.00	2.70
Out of centre commitments	22.92	8.35	1.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.55
Sub-total	**25.67**	**30.07**	**1.28**	**4.01**	**1.43**	**0.00**	**0.00**	**1.82**	**2.16**	**0.00**	**66.43**
Lewisham Central											
Lewisham town centre	5.50	15.03	6.51	22.32	1.21	0.00	0.00	0.00	0.62	1.70	52.89
Catford town centre	0.00	3.17	0.00	0.86	3.71	0.28	6.61	0.00	0.00	1.42	16.05
Other LB Lewisham (central)	0.92	15.70	3.70	45.20	2.93	0.00	7.61	12.44	0.77	5.57	94.84
Sub-total	**6.42**	**33.91**	**10.21**	**68.38**	**7.85**	**0.28**	**14.22**	**12.44**	**1.39**	**8.69**	**163.78**
Lewisham Eastern											
Blackheath DC	5.04	3.34	52.83	33.62	11.14	0.67	0.72	0.00	0.00	0.00	107.36
Lee Green DC	0.00	0.84	7.78	0.43	6.28	0.00	0.00	0.00	0.00	0.00	15.33
Sub-total	**5.04**	**4.18**	**60.61**	**34.05**	**17.42**	**0.67**	**0.72**	**0.00**	**0.00**	**0.00**	**122.69**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.57	0.29	0.00	0.00	0.00	0.00	0.00	0.86
Other LB Lewisham (south)	0.00	5.35	0.00	0.00	1.07	0.28	7.32	0.00	0.00	2.65	16.67
Sub-total	**0.00**	**5.35**	**0.00**	**0.57**	**1.36**	**0.28**	**7.32**	**0.00**	**0.00**	**2.65**	**17.52**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	27.14	0.00	0.46	0.00	27.60
Forest Hill DC	0.00	0.84	0.00	0.00	0.00	0.00	23.41	5.16	0.00	20.03	49.43
Sub-total	**0.00**	**0.84**	**0.00**	**0.00**	**0.00**	**0.00**	**50.55**	**5.16**	**0.46**	**20.03**	**77.03**
LB Lewisham total	**37.13**	**74.34**	**72.10**	**107.00**	**28.06**	**1.23**	**72.81**	**19.41**	**4.01**	**31.37**	**447.45**
Outside LB Lewisham											
Surrey Quays/Canda Waters	42.02	4.34	0.00	0.00	0.00	0.00	0.86	0.00	0.00	0.00	47.23
Bermondsey	4.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.89
Peckham	0.92	29.07	0.51	2.86	0.00	0.78	0.00	0.00	0.00	1.32	35.46
West Norwood	0.00	0.00	0.00	0.00	0.00	0.28	0.00	17.44	1.08	0.00	18.80
Greenwich	11.46	9.35	31.39	7.44	4.93	0.00	5.46	1.82	0.00	0.47	72.32
Bromley	3.51	3.34	0.00	3.58	15.07	42.02	8.62	1.21	4.16	0.66	82.18
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	15.80	25.63	34.53	0.76	76.71
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.76	6.78	0.00	8.26
Beckenham	0.00	0.00	0.00	0.00	2.36	2.18	14.50	1.36	46.56	1.51	68.47
Dulwich Village	0.00	3.17	0.00	0.00	0.00	0.00	0.00	5.91	1.54	3.50	14.13
East Dulwich	0.00	11.69	0.00	1.43	0.00	0.00	0.00	2.58	0.00	36.38	52.08
Central London	30.56	15.87	13.27	13.16	10.64	8.10	18.96	40.49	25.28	14.83	191.17
Croydon	0.00	0.84	0.00	0.00	0.93	0.00	0.86	2.43	14.95	0.00	20.01
Brixton	1.53	0.00	0.00	0.00	0.00	0.00	0.00	10.92	0.77	0.47	13.69
Streatham	0.00	0.84	0.00	0.00	0.79	0.00	0.00	10.01	0.00	0.00	11.63
Eltham	0.61	0.00	3.32	1.14	0.64	0.00	0.00	0.00	0.00	1.42	7.13
Other	20.17	14.20	7.02	6.44	8.00	1.29	5.03	11.68	14.49	1.80	90.10
TOTAL	**152.80**	**167.05**	**127.61**	**143.05**	**71.41**	**55.88**	**143.60**	**151.65**	**154.16**	**94.48**	**1,261.70**

Source: Table 3 and 6

Table 8 - Future 2030 food beverage expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2030	180.10	200.10	143.34	154.20	76.62	65.04	160.49	167.23	168.78	103.23	**1,419.14**
Lewisham Northern											
Deptford DC	3.24	16.01	0.00	0.93	1.15	0.00	0.00	0.00	0.00	0.00	21.32
New Cross DC	0.00	7.20	0.00	3.39	0.00	0.00	0.00	2.01	2.36	0.00	14.97
Other LB Lewisham (north)	0.00	2.80	0.00	0.00	0.38	0.00	0.00	0.00	0.00	0.00	3.18
Out of centre commitments	27.02	10.01	1.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38.45
Sub-total	**30.26**	**36.02**	**1.43**	**4.32**	**1.53**	**0.00**	**0.00**	**2.01**	**2.36**	**0.00**	**77.93**
Lewisham Central											
Lewisham town centre	6.48	18.01	7.31	24.06	1.30	0.00	0.00	0.00	0.68	1.86	59.70
Catford town centre	0.00	3.80	0.00	0.93	3.98	0.33	7.38	0.00	0.00	1.55	17.97
Other LB Lewisham (central)	1.08	18.81	4.16	48.73	3.14	0.00	8.51	13.71	0.84	6.09	105.07
Sub-total	**7.56**	**40.62**	**11.47**	**73.71**	**8.43**	**0.33**	**15.89**	**13.71**	**1.52**	**9.50**	**182.73**
Lewisham Eastern											
Blackheath DC	5.94	4.00	59.34	36.24	11.95	0.78	0.80	0.00	0.00	0.00	119.06
Lee Green DC	0.00	1.00	8.74	0.46	6.74	0.00	0.00	0.00	0.00	0.00	16.95
Sub-total	**5.94**	**5.00**	**68.09**	**36.70**	**18.70**	**0.78**	**0.80**	**0.00**	**0.00**	**0.00**	**136.01**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.62	0.31	0.00	0.00	0.00	0.00	0.00	0.92
Other LB Lewisham (south)	0.00	6.40	0.00	0.00	1.15	0.33	8.18	0.00	0.00	2.89	18.95
Sub-total	**0.00**	**6.40**	**0.00**	**0.62**	**1.46**	**0.33**	**8.18**	**0.00**	**0.00**	**2.89**	**19.88**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	30.33	0.00	0.51	0.00	30.84
Forest Hill DC	0.00	1.00	0.00	0.00	0.00	0.00	26.16	5.69	0.00	21.88	54.73
Sub-total	**0.00**	**1.00**	**0.00**	**0.00**	**0.00**	**0.00**	**56.49**	**5.69**	**0.51**	**21.88**	**85.57**
LB Lewisham total	**43.76**	**89.05**	**80.99**	**115.35**	**30.11**	**1.43**	**81.37**	**21.41**	**4.39**	**34.27**	**502.12**
Outside LB Lewisham											
Surrey Quays/Canda Waters	49.53	5.20	0.00	0.00	0.00	0.00	0.96	0.00	0.00	0.00	55.69
Bermondsey	5.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.76
Peckham	1.08	34.82	0.57	3.08	0.00	0.91	0.00	0.00	0.00	1.45	41.91
West Norwood	0.00	0.00	0.00	0.00	0.00	0.33	0.00	19.23	1.18	0.00	20.74
Greenwich	13.51	11.21	35.26	8.02	5.29	0.00	6.10	2.01	0.00	0.52	81.90
Bromley	4.14	4.00	0.00	3.86	16.17	48.91	9.63	1.34	4.56	0.72	93.33
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	17.65	28.26	37.81	0.83	84.55
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.84	7.43	0.00	9.06
Beckenham	0.00	0.00	0.00	0.00	2.53	2.54	16.21	1.51	50.97	1.65	75.40
Dulwich Village	0.00	3.80	0.00	0.00	0.00	0.00	0.00	6.52	1.69	3.82	15.83
East Dulwich	0.00	14.01	0.00	1.54	0.00	0.00	0.00	2.84	0.00	39.74	58.13
Central London	36.02	19.01	14.91	14.19	11.42	9.43	21.18	44.65	27.68	16.21	214.69
Croydon	0.00	1.00	0.00	0.00	1.00	0.00	0.96	2.68	16.37	0.00	22.01
Brixton	1.80	0.00	0.00	0.00	0.00	0.00	0.00	12.04	0.84	0.52	15.20
Streatham	0.00	1.00	0.00	0.00	0.84	0.00	0.00	11.04	0.00	0.00	12.88
Eltham	0.72	0.00	3.73	1.23	0.69	0.00	0.00	0.00	0.00	1.55	7.92
Other	23.77	17.01	7.88	6.94	8.58	1.50	5.62	12.88	15.87	1.96	102.00
TOTAL	**180.10**	**200.10**	**143.34**	**154.20**	**76.62**	**65.04**	**160.49**	**167.23**	**168.78**	**103.23**	**1,419.14**

Source: Table 3 and 6

Table 9 - Future 2035 food beverage expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	199.20	228.14	153.18	162.14	81.26	69.10	176.61	179.41	179.33	109.32	**1,537.69**
Lewisham Northern											
Deptford DC	3.59	18.25	0.00	0.97	1.22	0.00	0.00	0.00	0.00	0.00	24.03
New Cross DC	0.00	8.21	0.00	3.57	0.00	0.00	0.00	2.15	2.51	0.00	16.44
Other LB Lewisham (north)	0.00	3.19	0.00	0.00	0.41	0.00	0.00	0.00	0.00	0.00	3.60
Out of centre commitments	29.88	11.41	1.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.82
Sub-total	**33.46**	**41.06**	**1.53**	**4.54**	**1.63**	**0.00**	**0.00**	**2.15**	**2.51**	**0.00**	**86.89**
Lewisham Central											
Lewisham town centre	7.17	20.53	7.81	25.29	1.38	0.00	0.00	0.00	0.72	1.97	64.88
Catford town centre	0.00	4.33	0.00	0.97	4.23	0.35	8.12	0.00	0.00	1.64	19.64
Other LB Lewisham (central)	1.20	21.44	4.44	51.24	3.33	0.00	9.36	14.71	0.90	6.45	113.07
Sub-total	**8.37**	**46.31**	**12.25**	**77.50**	**8.94**	**0.35**	**17.48**	**14.71**	**1.61**	**10.06**	**197.59**
Lewisham Eastern											
Blackheath DC	6.57	4.56	63.41	38.10	12.68	0.83	0.88	0.00	0.00	0.00	127.04
Lee Green DC	0.00	1.14	9.34	0.49	7.15	0.00	0.00	0.00	0.00	0.00	18.12
Sub-total	**6.57**	**5.70**	**72.76**	**38.59**	**19.83**	**0.83**	**0.88**	**0.00**	**0.00**	**0.00**	**145.17**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.65	0.33	0.00	0.00	0.00	0.00	0.00	0.97
Other LB Lewisham (south)	0.00	7.30	0.00	0.00	1.22	0.35	9.01	0.00	0.00	3.06	20.93
Sub-total	**0.00**	**7.30**	**0.00**	**0.65**	**1.54**	**0.35**	**9.01**	**0.00**	**0.00**	**3.06**	**21.91**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	33.38	0.00	0.54	0.00	33.92
Forest Hill DC	0.00	1.14	0.00	0.00	0.00	0.00	28.79	6.10	0.00	23.18	59.20
Sub-total	**0.00**	**1.14**	**0.00**	**0.00**	**0.00**	**0.00**	**62.17**	**6.10**	**0.54**	**23.18**	**93.12**
LB Lewisham total	**48.40**	**101.52**	**86.54**	**121.28**	**31.94**	**1.52**	**89.54**	**22.97**	**4.66**	**36.29**	**544.67**
Outside LB Lewisham											
Surrey Quays/Canda Waters	54.78	5.93	0.00	0.00	0.00	0.00	1.06	0.00	0.00	0.00	61.77
Bermondsey	6.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.37
Peckham	1.20	39.70	0.61	3.24	0.00	0.97	0.00	0.00	0.00	1.53	47.24
West Norwood	0.00	0.00	0.00	0.00	0.00	0.35	0.00	20.63	1.26	0.00	22.23
Greenwich	14.94	12.78	37.68	8.43	5.61	0.00	6.71	2.15	0.00	0.55	88.85
Bromley	4.58	4.56	0.00	4.05	17.15	51.96	10.60	1.44	4.84	0.77	99.94
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	19.43	30.32	40.17	0.87	90.79
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.88	0.90	7.89	0.00	9.67
Beckenham	0.00	0.00	0.00	0.00	2.68	2.69	17.84	1.61	54.16	1.75	80.74
Dulwich Village	0.00	4.33	0.00	0.00	0.00	0.00	0.00	7.00	1.79	4.04	17.17
East Dulwich	0.00	15.97	0.00	1.62	0.00	0.00	0.00	3.05	0.00	42.09	62.73
Central London	39.84	21.67	15.93	14.92	12.11	10.02	23.31	47.90	29.41	17.16	232.28
Croydon	0.00	1.14	0.00	0.00	1.06	0.00	1.06	2.87	17.40	0.00	23.52
Brixton	1.99	0.00	0.00	0.00	0.00	0.00	0.00	12.92	0.90	0.55	16.35
Streatham	0.00	1.14	0.00	0.00	0.89	0.00	0.00	11.84	0.00	0.00	13.88
Eltham	0.80	0.00	3.98	1.30	0.73	0.00	0.00	0.00	0.00	1.64	8.45
Other	26.29	19.39	8.42	7.30	9.10	1.59	6.18	13.81	16.86	2.08	111.03
TOTAL	**199.20**	**228.14**	**153.18**	**162.14**	**81.26**	**69.10**	**176.61**	**179.41**	**179.33**	**109.32**	**1,537.69**

Source: Table 3 and 6

Table 10 - Future 2040 food beverage expenditure patterns by zone (£M)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2040	215.78	249.70	165.76	172.40	85.77	74.40	187.54	192.56	192.46	117.46	**1,653.83**
Lewisham Northern											
Deptford DC	3.88	19.98	0.00	1.03	1.29	0.00	0.00	0.00	0.00	0.00	26.18
New Cross DC	0.00	8.99	0.00	3.79	0.00	0.00	0.00	2.31	2.69	0.00	17.79
Other LB Lewisham (north)	0.00	3.50	0.00	0.00	0.43	0.00	0.00	0.00	0.00	0.00	3.92
Out of centre commitments	32.37	12.48	1.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	46.51
Sub-total	**36.25**	**44.95**	**1.66**	**4.83**	**1.72**	**0.00**	**0.00**	**2.31**	**2.69**	**0.00**	**94.40**
Lewisham Central											
Lewisham town centre	7.77	22.47	8.45	26.89	1.46	0.00	0.00	0.00	0.77	2.11	69.93
Catford town centre	0.00	4.74	0.00	1.03	4.46	0.37	8.63	0.00	0.00	1.76	21.00
Other LB Lewisham (central)	1.29	23.47	4.81	54.48	3.52	0.00	9.94	15.79	0.96	6.93	121.19
Sub-total	**9.06**	**50.69**	**13.26**	**82.41**	**9.43**	**0.37**	**18.57**	**15.79**	**1.73**	**10.81**	**212.12**
Lewisham Eastern											
Blackheath DC	7.12	4.99	68.63	40.51	13.38	0.89	0.94	0.00	0.00	0.00	136.46
Lee Green DC	0.00	1.25	10.11	0.52	7.55	0.00	0.00	0.00	0.00	0.00	19.42
Sub-total	**7.12**	**6.24**	**78.74**	**41.03**	**20.93**	**0.89**	**0.94**	**0.00**	**0.00**	**0.00**	**155.89**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.69	0.34	0.00	0.00	0.00	0.00	0.00	1.03
Other LB Lewisham (south)	0.00	7.99	0.00	0.00	1.29	0.37	9.56	0.00	0.00	3.29	22.50
Sub-total	**0.00**	**7.99**	**0.00**	**0.69**	**1.63**	**0.37**	**9.56**	**0.00**	**0.00**	**3.29**	**23.53**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	35.44	0.00	0.58	0.00	36.02
Forest Hill DC	0.00	1.25	0.00	0.00	0.00	0.00	30.57	6.55	0.00	24.90	63.27
Sub-total	**0.00**	**1.25**	**0.00**	**0.00**	**0.00**	**0.00**	**66.01**	**6.55**	**0.58**	**24.90**	**99.29**
LB Lewisham total	**52.44**	**111.11**	**93.66**	**128.96**	**33.71**	**1.64**	**95.08**	**24.65**	**5.00**	**39.00**	**585.23**
Outside LB Lewisham											
Surrey Quays/Canda Waters	59.34	6.49	0.00	0.00	0.00	0.00	1.13	0.00	0.00	0.00	66.96
Bermondsey	6.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.91
Peckham	1.29	43.45	0.66	3.45	0.00	1.04	0.00	0.00	0.00	1.64	51.54
West Norwood	0.00	0.00	0.00	0.00	0.00	0.37	0.00	22.14	1.35	0.00	23.86
Greenwich	16.18	13.98	40.78	8.96	5.92	0.00	7.13	2.31	0.00	0.59	95.85
Bromley	4.96	4.99	0.00	4.31	18.10	55.95	11.25	1.54	5.20	0.82	107.13
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	20.63	32.54	43.11	0.94	97.22
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.94	0.96	8.47	0.00	10.37
Beckenham	0.00	0.00	0.00	0.00	2.83	2.90	18.94	1.73	58.12	1.88	86.41
Dulwich Village	0.00	4.74	0.00	0.00	0.00	0.00	0.00	7.51	1.92	4.35	18.52
East Dulwich	0.00	17.48	0.00	1.72	0.00	0.00	0.00	3.27	0.00	45.22	67.70
Central London	43.16	23.72	17.24	15.86	12.78	10.79	24.76	51.41	31.56	18.44	249.72
Croydon	0.00	1.25	0.00	0.00	1.11	0.00	1.13	3.08	18.67	0.00	25.24
Brixton	2.16	0.00	0.00	0.00	0.00	0.00	0.00	13.86	0.96	0.59	17.57
Streatham	0.00	1.25	0.00	0.00	0.94	0.00	0.00	12.71	0.00	0.00	14.90
Eltham	0.86	0.00	4.31	1.38	0.77	0.00	0.00	0.00	0.00	1.76	9.09
Other	28.48	21.22	9.12	7.76	9.61	1.71	6.56	14.83	18.09	2.23	119.61
TOTAL	**215.78**	**249.70**	**165.76**	**172.40**	**85.77**	**74.40**	**187.54**	**192.56**	**192.46**	**117.46**	**1,653.83**

Source: Table 3 and 6

Table 11 - Food/beverage outlets - in centre

	Restaurant/cafés	Pubs/bars	Hot food takeaways	Total
Lewisham town centre	31	4	19	54
Catford town centre	26	3	16	45
Blackheath district centre	17	5	2	24
Deptford district centre	32	10	14	56
Downham district centre	6	0	9	15
Forest Hill district centre	25	6	10	41
Lee Green district centre	7	3	6	16
New Cross distriict centre	24	7	24	55
Sydenham district centre	15	4	10	29
Total	**183**	**42**	**110**	**335**

Lichfields' landuse survey July 2021

Table 12 - Commitments for new food and beverage floorspace

Scheme	Maximum proposed floorspace sq.m gross	Estmated % food/beverage	Food/beverage floorspace sq.m gross
Lewisham Gateway (Phase 2)	4,381	20%	876
Carpetright site, Lewisham	960	30%	288
New Bermondsey / Surrey Canal Triangle	6,300	52%	3,300
Convoys Wharf	10,330	44%	4,520
Oxestalls Road, Deptford	3,571	30%	1,071
Leegate Centre	3,950	20%	790
Leegate Centre (loss)	-1,000	30%	-300
Sub-total	**28,492**		**10,546**

Source: Planning application details.

Table 13 - Summary of food and beverage expenditure 2021 to 2040 (£M)

	2021	2025	2030	2035	2040
Available expenditure					
Lewisham Northern - Deptford/New Cross	26.36	66.43	77.93	86.89	94.40
Lewisham Central - Lewisham/Catford	130.17	163.78	182.73	197.59	212.12
Lewisham Eastern - Lee/Blackheath	96.02	122.69	136.01	145.17	155.89
Lewisham Southern - Bell Green/Downham	13.74	17.52	19.88	21.91	23.53
Lewisham Western - Forest Hill/Sydenham	61.64	77.03	85.57	93.12	99.29
Total	**327.93**	**447.45**	**502.12**	**544.67**	**585.23**
Turnover of existing facilities					
Lewisham Northern - Deptford/New Cross	26.36	34.63	36.40	38.25	40.21
Lewisham Central - Lewisham/Catford	130.17	171.04	179.76	188.93	198.57
Lewisham Eastern - Lee/Blackheath	96.02	126.18	132.61	139.38	146.49
Lewisham Southern - Bell Green/Downham	13.74	18.05	18.97	19.94	20.96
Lewisham Western - Forest Hill/Sydenham	61.64	81.00	85.13	89.47	94.03
Total	**327.93**	**430.89**	**452.87**	**475.97**	**500.25**
Turnover of commitments					
Lewisham Northern - Deptford/New Cross	0.00	46.26	48.62	51.10	53.71
Lewisham Central - Lewisham/Catford	0.00	6.06	6.37	6.69	7.03
Lewisham Eastern - Lee/Blackheath	0.00	2.55	2.68	2.82	2.96
Lewisham Southern - Bell Green/Downham	0.00	0.00	0.00	0.00	0.00
Lewisham Western - Forest Hill/Sydenham	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**54.87**	**57.67**	**60.61**	**63.70**
Surplus/deficit expenditure £M					
Lewisham Northern - Deptford/New Cross	0.00	-14.47	-7.09	-2.47	0.49
Lewisham Central - Lewisham/Catford	0.00	-13.31	-3.39	1.97	6.52
Lewisham Eastern - Lee/Blackheath	0.00	-6.03	0.72	2.97	6.44
Lewisham Southern - Bell Green/Downham	0.00	-0.53	0.90	1.96	2.58
Lewisham Western - Forest Hill/Sydenham	0.00	-3.96	0.44	3.65	5.25
Total	**0.00**	**-38.31**	**-8.42**	**8.09**	**21.28**

Source: Tables 5 to 12

Table 14 - Food and beverage goods floorspace capacity up to 2040

	2021	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,203	£5,468	£5,747	£6,041
Floorspace projection (sq.m gross)					
Lewisham Northern - Deptford/New Cross	0	-2,780	-1,297	-429	81
Lewisham Central - Lewisham/Catford	0	-2,559	-621	342	1,079
Lewisham Eastern - Lee/Blackheath	0	-1,160	132	517	1,067
Lewisham Southern - Bell Green/Downham	0	-102	165	342	426
Lewisham Western - Forest Hill/Sydenham	0	-762	80	635	870
Total	**0**	**-7,363**	**-1,540**	**1,408**	**3,523**

Source: Table 13

Appendix 5 Impact assessment

Table 1 - Future 2035 comparison goods expenditure patterns (£M) - with Bell Green New Town Centre (worst case)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	324.29	441.40	281.52	314.29	202.96	165.12	386.09	377.36	391.82	219.84	**3,104.69**
Lewisham Northern											
Deptford	6.81	3.97	1.97	0.00	0.00	0.00	0.00	0.00	0.00	0.42	13.17
New Cross	0.65	22.05	0.00	5.00	0.20	0.00	0.00	0.00	0.00	0.00	27.90
Out of centre commitments	19.46	17.63	2.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	39.90
Sub-total	**26.92**	**43.65**	**4.79**	**5.00**	**0.20**	**0.00**	**0.00**	**0.00**	**0.00**	**0.42**	**80.98**
Lewisham Central											
Lewisham town centre	43.78	114.16	58.56	146.83	23.97	2.29	55.34	1.12	0.76	15.22	462.03
Catford town centre	1.62	3.09	0.00	7.48	11.38	4.58	24.42	0.00	1.52	0.42	54.51
Catford out of centre	0.65	4.85	3.10	22.48	17.42	11.47	16.78	0.75	4.21	5.89	87.60
Sub-total	**46.05**	**122.10**	**61.65**	**176.78**	**52.78**	**18.35**	**96.54**	**1.88**	**6.49**	**21.53**	**604.14**
Lewisham Eastern											
Blackheath	0.32	1.32	4.50	0.63	2.01	0.00	0.00	0.00	0.00	0.00	8.78
Lee Green	0.32	0.00	14.36	2.81	7.23	0.16	0.00	0.00	0.38	0.00	25.27
Sub-total	**0.65**	**1.32**	**18.86**	**3.44**	**9.24**	**0.16**	**0.00**	**0.00**	**0.38**	**0.00**	**34.06**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.80	2.29	0.00	0.00	0.00	0.00	3.09
Bell Green New Town Centre	0.00	0.98	0.00	4.18	4.95	2.20	89.03	3.35	16.51	17.06	138.25
Sub-total	**0.00**	**0.98**	**0.00**	**4.18**	**5.75**	**4.49**	**89.03**	**3.35**	**16.51**	**17.06**	**141.34**
Lewisham Western											
Sydenham	0.00	0.88	0.00	0.62	0.00	0.82	37.11	1.87	2.28	2.71	46.30
Forest Hill	0.00	0.44	0.00	0.00	0.00	0.00	19.21	0.37	0.00	15.43	35.45
Sub-total	**0.00**	**1.32**	**0.00**	**0.62**	**0.00**	**0.82**	**56.32**	**2.25**	**2.28**	**18.14**	**81.75**
LB Lewisham total	**73.61**	**169.37**	**85.30**	**190.03**	**67.96**	**23.82**	**241.89**	**7.47**	**25.66**	**57.15**	**942.27**
Outside LB Lewisham											
Surrey Quays/Canda Waters	88.53	18.52	0.00	10.61	0.00	0.00	0.00	0.00	0.00	2.52	120.19
Peckham	5.84	55.55	0.00	0.62	0.00	0.00	0.00	1.50	0.38	13.46	77.36
Greenwich	12.32	2.65	26.74	7.18	2.60	0.49	2.01	1.50	3.44	0.42	59.36
Bromley	2.92	13.67	7.04	12.49	51.87	108.85	63.77	13.14	89.84	19.36	382.93
Penge	0.32	0.44	0.00	0.00	0.00	0.16	6.71	3.38	37.08	2.10	50.21
Beckenham	0.00	0.44	1.41	0.31	0.80	0.33	1.01	4.50	31.73	0.42	40.95
East Dulwich	0.00	6.17	0.00	0.00	0.00	0.00	0.00	3.00	0.00	22.72	31.90
Central London	44.75	59.96	35.75	36.83	8.41	11.80	25.51	85.96	25.61	46.50	381.09
Croydon	3.24	18.96	1.41	2.50	0.80	2.46	21.14	89.72	129.98	22.51	292.71
Bluewater	4.86	7.94	55.18	15.92	15.62	7.38	5.71	1.50	7.26	7.99	129.36
Charlton retail warehousing	3.89	2.65	25.34	1.25	11.42	0.00	0.00	1.13	0.00	0.00	45.66
Old Kent Road	49.62	71.42	0.28	1.56	0.00	0.00	0.34	0.75	0.00	4.63	128.60
Brixton	0.00	0.00	0.00	0.00	0.00	2.46	0.00	37.16	0.00	3.37	42.99
Streatham	0.00	0.00	0.00	0.00	0.20	0.00	0.00	36.41	0.00	0.00	36.61
Eltham	0.32	0.00	6.76	1.25	13.42	0.00	0.00	0.00	0.00	1.47	23.22
Stratford/Westfields	15.24	0.00	4.50	1.87	0.40	0.00	1.01	0.00	0.00	0.63	23.66
Local centres in suvrey area	0.00	1.32	6.76	5.95	2.82	0.00	7.94	51.94	25.55	2.80	105.07
Other	18.81	12.34	25.06	25.91	26.64	7.38	9.06	38.29	15.29	11.78	190.55
TOTAL	**324.29**	**441.40**	**281.52**	**314.29**	**202.96**	**165.12**	**386.09**	**377.36**	**391.82**	**219.84**	**3,104.69**

Table 2 - Comparison goods impact assessment - Bell Green New Town Centre (worst case)

	Base year 2021 turnover £M	Design year 2035 turnover £M	Trade diversion to Bell Green TC £M	Design year 2035 turnover with Bell Green TC £M	% Impact	Base year v design year % difference
Column	A	B	C	D	E	F
Lewisham Northern						
Deptford	8.62	13.19	-0.02	13.17	-0.1%	52.8%
New Cross	17.31	27.95	-0.05	27.90	-0.2%	61.1%
Out of centre commitments	n/a	39.93	-0.02	39.90	-0.1%	n/a
Lewisham Central						
Lewisham town centre	315.16	474.95	-12.92	462.03	-2.7%	46.6%
Catford town centre	39.95	59.41	-4.90	54.51	-8.2%	36.5%
Catford out of centre	61.98	90.97	-3.37	87.60	-3.7%	41.3%
Lewisham Eastern						
Blackheath	5.76	8.81	-0.03	8.78	-0.3%	52.4%
Lee Green	17.15	25.37	-0.10	25.27	-0.4%	47.3%
Lewisham Southern						
Downham	2.01	3.12	-0.03	3.09	-1.1%	53.6%
Bell Green Retail Park	42.30	62.35	-62.35	0.00	-100.0%	-100.0%
Bell Green New Town Centre	n/a	n/a	n/a	138.25	n/a	n/a
Lewisham Western						
Sydenham	35.78	53.45	-7.14	46.30	-13.4%	29.4%
Forest Hill	27.20	39.87	-4.42	35.45	-11.1%	30.3%
LB Lewisham total	**573.23**	**899.38**	**-95.36**	**942.27**	**n/a**	**n/a**
Outside LB Lewisham						
Surrey Quays/Canda Waters	77.44	120.39	-0.21	120.19	-0.2%	55.2%
Peckham	47.84	78.05	-0.69	77.36	-0.9%	61.7%
Greenwich	39.44	59.87	-0.51	59.36	-0.8%	50.5%
Bromley	265.56	397.29	-14.36	382.93	-3.6%	44.2%
Penge	36.32	52.25	-2.05	50.21	-3.9%	38.2%
Beckenham	29.25	41.95	-1.00	40.95	-2.4%	40.0%
East Dulwich	22.35	32.94	-1.04	31.90	-3.2%	42.7%
Local centres in survey area	73.28	106.18	-1.11	105.07	-1.0%	43.4%
Other outside survey area	878.98	1,316.37	-21.92	1,294.46	-1.7%	47.3%
TOTAL	**2,043.68**	**3,104.69**	**-138.25**	**3,104.69**	**-4.5%**	**51.9%**

Table 3 - Future 2035 comparison goods expenditure patterns (£M) - with Bell Green New Town Centre (best case)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	324.29	441.40	281.52	314.29	202.96	165.12	386.09	377.36	391.82	219.84	**3,104.69**
Lewisham Northern											
Deptford	6.81	3.97	1.97	0.00	0.00	0.00	0.00	0.00	0.00	0.43	13.18
New Cross	0.65	22.06	0.00	5.01	0.20	0.00	0.00	0.00	0.00	0.00	27.92
Out of centre commitments	19.46	17.64	2.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	39.92
Sub-total	**26.92**	**43.67**	**4.79**	**5.01**	**0.20**	**0.00**	**0.00**	**0.00**	**0.00**	**0.43**	**81.02**
Lewisham Central											
Lewisham town centre	43.78	114.24	58.56	147.39	24.15	2.30	60.18	1.13	0.77	15.61	468.11
Catford town centre	1.62	3.09	0.00	7.51	11.47	4.60	26.55	0.00	1.54	0.43	56.81
Catford out of centre	0.65	4.85	3.10	22.55	17.53	11.51	17.97	0.75	4.25	6.02	89.18
Sub-total	**46.05**	**122.18**	**61.65**	**177.45**	**53.15**	**18.42**	**104.70**	**1.88**	**6.57**	**22.05**	**614.11**
Lewisham Eastern											
Blackheath	0.32	1.32	4.50	0.63	2.02	0.00	0.00	0.00	0.00	0.00	8.80
Lee Green	0.32	0.00	14.36	2.82	7.27	0.16	0.00	0.00	0.39	0.00	25.32
Sub-total	**0.65**	**1.32**	**18.86**	**3.45**	**9.28**	**0.16**	**0.00**	**0.00**	**0.39**	**0.00**	**34.12**
Lewisham Southern											
Downham	0.00	0.00	0.00	0.00	0.80	2.30	0.00	0.00	0.00	0.00	3.11
Bell Green New Town Centre	0.00	0.73	0.00	3.10	3.67	1.63	66.04	2.48	12.24	12.66	102.55
Sub-total	**0.00**	**0.73**	**0.00**	**3.10**	**4.48**	**3.93**	**66.04**	**2.48**	**12.24**	**12.66**	**105.66**
Lewisham Western											
Sydenham	0.00	0.88	0.00	0.63	0.00	0.82	40.36	1.88	2.31	2.78	49.66
Forest Hill	0.00	0.44	0.00	0.00	0.00	0.00	20.89	0.38	0.00	15.82	37.53
Sub-total	**0.00**	**1.32**	**0.00**	**0.63**	**0.00**	**0.82**	**61.24**	**2.26**	**2.31**	**18.60**	**87.19**
LB Lewisham total	**73.61**	**169.22**	**85.30**	**189.64**	**67.12**	**23.33**	**231.99**	**6.62**	**21.52**	**53.74**	**922.10**
Outside LB Lewisham											
Surrey Quays/Canda Waters	88.53	18.53	0.00	10.65	0.00	0.00	0.00	0.00	0.00	2.58	120.28
Peckham	5.84	55.58	0.00	0.63	0.00	0.00	0.00	1.51	0.39	13.75	77.69
Greenwich	12.32	2.65	26.74	7.20	2.62	0.49	2.16	1.51	3.48	0.43	59.60
Bromley	2.92	13.68	7.04	12.53	52.20	109.22	68.28	13.17	90.89	19.76	389.68
Penge	0.32	0.44	0.00	0.00	0.00	0.16	7.19	3.39	37.52	2.15	51.17
Beckenham	0.00	0.44	1.41	0.31	0.81	0.33	1.08	4.52	32.10	0.43	41.42
East Dulwich	0.00	6.18	0.00	0.00	0.00	0.00	0.00	3.01	0.00	23.20	32.39
Central London	44.75	59.99	35.75	36.95	8.46	11.84	27.31	86.17	25.91	47.48	384.64
Croydon	3.24	18.97	1.41	2.51	0.81	2.47	22.64	89.94	131.50	22.99	296.46
Bluewater	4.86	7.94	55.18	15.97	15.72	7.40	6.11	1.51	7.35	8.16	130.20
Charlton retail warehousing	3.89	2.65	25.34	1.25	11.49	0.00	0.00	1.13	0.00	0.00	45.74
Old Kent Road	49.62	71.46	0.28	1.57	0.00	0.00	0.36	0.75	0.00	4.73	128.76
Brixton	0.00	0.00	0.00	0.00	0.00	2.47	0.00	37.25	0.00	3.44	43.16
Streatham	0.00	0.00	0.00	0.00	0.20	0.00	0.00	36.50	0.00	0.00	36.70
Eltham	0.32	0.00	6.76	1.25	13.50	0.00	0.00	0.00	0.00	1.50	23.34
Stratford/Westfields	15.24	0.00	4.50	1.88	0.40	0.00	1.08	0.00	0.00	0.64	23.75
Local centres in suvrey area	0.00	1.32	6.76	5.96	2.83	0.00	8.20	52.00	25.69	2.83	105.59
Other	18.81	12.35	25.06	25.99	26.80	7.40	9.70	38.38	15.47	12.03	192.00
TOTAL	**324.29**	**441.40**	**281.52**	**314.29**	**202.96**	**165.12**	**386.09**	**377.36**	**391.82**	**219.84**	**3,104.69**

Table 4 - Comparison goods impact assessment - Bell Green New Town Centre (best case)

	Base year 2021 turnover £M	Design year 2035 turnover £M	Trade diversion to Bell Green TC £M	Design year 2035 turnover with Bell Green TC £M	% Impact	Base year v design year % difference
Column	A	B	C	D	E	F
Lewisham Northern						
Deptford	8.62	13.19	-0.01	13.18	-0.1%	53.0%
New Cross	17.31	27.95	-0.03	27.92	-0.1%	61.3%
Out of centre commitments	n/a	39.93	-0.01	39.92	0.0%	n/a
Lewisham Central						
Lewisham town centre	315.16	474.95	-6.84	468.11	-1.4%	48.5%
Catford town centre	39.95	59.41	-2.60	56.81	-4.4%	42.2%
Catford out of centre	61.98	90.97	-1.79	89.18	-2.0%	43.9%
Lewisham Eastern						
Blackheath	5.76	8.81	-0.01	8.80	-0.2%	52.6%
Lee Green	17.15	25.37	-0.05	25.32	-0.2%	47.6%
Lewisham Southern						
Downham	2.01	3.12	-0.02	3.11	-0.6%	54.4%
Bell Green Retail Park	42.30	62.35	-62.35	0.00	-100.0%	-100.0%
Bell Green New Town Centre	n/a	n/a	n/a	102.55	n/a	n/a
Lewisham Western						
Sydenham	35.78	53.45	-3.78	49.66	-7.1%	38.8%
Forest Hill	27.20	39.87	-2.34	37.53	-5.9%	38.0%
LB Lewisham total	**573.23**	**899.38**	**-79.84**	**922.10**	**-8.9%**	**n/a**
Outside LB Lewisham						
Surrey Quays/Canda Waters	77.44	120.39	-0.11	120.28	-0.1%	55.3%
Peckham	47.84	78.05	-0.37	77.69	-0.5%	62.4%
Greenwich	39.44	59.87	-0.27	59.60	-0.4%	51.1%
Bromley	265.56	397.29	-7.61	389.68	-1.9%	46.7%
Penge	36.32	52.25	-1.08	51.17	-2.1%	40.9%
Beckenham	29.25	41.95	-0.53	41.42	-1.3%	41.6%
East Dulwich	22.35	32.94	-0.55	32.39	-1.7%	44.9%
Local centres in survey area	73.28	106.18	-0.59	105.59	-0.6%	44.1%
Other	878.98	1,316.37	-11.61	1,304.77	-0.9%	48.4%
TOTAL	**2,043.68**	**3,104.69**	**-102.55**	**3,104.69**	**-3.3%**	**51.9%**

Table 5 - Future 2035 food/beverage expenditure patterns (£M) - with Bell Green New Town Centre (worst case)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	199.20	228.14	153.18	162.14	81.26	69.10	176.61	179.41	179.33	109.32	**1,537.69**
Lewisham Northern											
Deptford DC	3.59	18.25	0.00	0.97	1.20	0.00	0.00	0.00	0.00	0.00	24.01
New Cross DC	0.00	8.21	0.00	3.55	0.00	0.00	0.00	2.15	2.48	0.00	16.40
Other LB Lewisham (north)	0.00	3.19	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	3.59
Out of centre commitments	29.88	11.41	1.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.82
Sub-total	**33.46**	**41.06**	**1.53**	**4.52**	**1.60**	**0.00**	**0.00**	**2.15**	**2.48**	**0.00**	**86.82**
Lewisham Central											
Lewisham town centre	7.17	20.53	7.81	25.20	1.36	0.00	0.00	0.00	0.71	1.93	64.71
Catford town centre	0.00	4.33	0.00	0.97	4.17	0.34	7.46	0.00	0.00	1.61	18.89
Other LB Lewisham (central)	1.20	21.44	4.44	51.04	3.29	0.00	8.60	14.68	0.89	6.33	111.90
Sub-total	**8.37**	**46.31**	**12.25**	**77.20**	**8.82**	**0.34**	**16.06**	**14.68**	**1.60**	**9.86**	**195.50**
Lewisham Eastern											
Blackheath DC	6.57	4.56	63.41	37.96	12.51	0.82	0.81	0.00	0.00	0.00	126.65
Lee Green DC	0.00	1.14	9.34	0.48	7.06	0.00	0.00	0.00	0.00	0.00	18.03
Sub-total	**6.57**	**5.70**	**72.76**	**38.44**	**19.57**	**0.82**	**0.81**	**0.00**	**0.00**	**0.00**	**144.68**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.65	0.32	0.00	0.00	0.00	0.00	0.00	0.97
Bell Green New Town Centre	0.00	0.00	0.00	0.63	1.15	0.52	15.68	0.42	2.10	2.50	23.00
Other LB Lewisham (south)	0.00	7.30	0.00	0.00	1.10	0.24	6.99	0.00	0.00	2.61	18.25
Sub-total	**0.00**	**7.30**	**0.00**	**1.28**	**2.58**	**0.76**	**22.67**	**0.42**	**2.10**	**5.11**	**42.21**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	30.66	0.00	0.53	0.00	31.19
Forest Hill DC	0.00	1.14	0.00	0.00	0.00	0.00	26.44	6.09	0.00	22.73	56.40
Sub-total	**0.00**	**1.14**	**0.00**	**0.00**	**0.00**	**0.00**	**57.10**	**6.09**	**0.53**	**22.73**	**87.59**
LB Lewisham total	**48.40**	**101.52**	**86.54**	**121.44**	**32.57**	**1.93**	**96.64**	**23.33**	**6.71**	**37.70**	**556.80**
Outside LB Lewisham											
Surrey Quays/Canda Waters	54.78	5.93	0.00	0.00	0.00	0.00	0.97	0.00	0.00	0.00	61.68
Bermondsey	6.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.37
Peckham	1.20	39.70	0.61	3.23	0.00	0.96	0.00	0.00	0.00	1.50	47.20
West Norwood	0.00	0.00	0.00	0.00	0.00	0.34	0.00	20.58	1.24	0.00	22.17
Greenwich	14.94	12.78	37.68	8.40	5.53	0.00	6.16	2.15	0.00	0.54	88.18
Bromley	4.58	4.56	0.00	4.04	16.92	51.64	9.73	1.43	4.79	0.75	98.45
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	17.84	30.25	39.70	0.86	88.65
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.81	0.89	7.80	0.00	9.50
Beckenham	0.00	0.00	0.00	0.00	2.65	2.68	16.38	1.61	53.52	1.72	78.56
Dulwich Village	0.00	4.33	0.00	0.00	0.00	0.00	0.00	6.98	1.77	3.97	17.05
East Dulwich	0.00	15.97	0.00	1.62	0.00	0.00	0.00	3.04	0.00	41.28	61.90
Central London	39.84	21.67	15.93	14.86	11.95	9.96	21.41	47.79	29.07	16.83	229.31
Croydon	0.00	1.14	0.00	0.00	1.04	0.00	0.97	2.86	17.19	0.00	23.21
Brixton	1.99	0.00	0.00	0.00	0.00	0.00	0.00	12.89	0.89	0.54	16.30
Streatham	0.00	1.14	0.00	0.00	0.88	0.00	0.00	11.81	0.00	0.00	13.84
Eltham	0.80	0.00	3.98	1.29	0.72	0.00	0.00	0.00	0.00	1.61	8.40
Other	26.29	19.39	8.42	7.27	8.98	1.58	5.68	13.78	16.66	2.04	110.10
TOTAL	**199.20**	**228.14**	**153.18**	**162.14**	**81.26**	**69.10**	**176.61**	**179.41**	**179.33**	**109.32**	**1,537.69**

Table 6 - Food/beverage impact assessment - Bell Green New Town Centre (worst case)

	Base year 2021 turnover £M	Design year 2035 turnover £M	Trade diversion to Bell Green TC £M	Design year 2035 turnover - with Bell Green TC £M	% Impact	Base year v design year % difference
Column	A	B	C	D	E	F
Lewisham Northern						
Deptford DC	13.98	24.03	-0.02	24.01	-0.1%	71.7%
New Cross DC	10.34	16.44	-0.05	16.40	-0.3%	58.6%
Other LB Lewisham (north)	2.04	3.60	-0.01	3.59	-0.1%	76.4%
Out of centre commitments	n/a	42.82	-0.07	42.82	-0.2%	n/a
Lewisham Central						
Lewisham town centre	42.40	64.88	-0.16	64.71	-0.3%	52.6%
Catford town centre	12.64	19.64	-0.75	18.89	-3.8%	49.4%
Other LB Lewisham (central)	75.13	113.07	-1.17	111.90	-1.0%	48.9%
Lewisham Eastern						
Blackheath DC	84.04	127.04	-0.39	126.65	-0.3%	50.7%
Lee Green DC	11.98	18.12	-0.09	18.03	-0.5%	50.4%
Lewisham Southern						
Downham DC	0.68	0.97	-0.01	0.97	-0.7%	41.4%
Bell Green New Town Centre	n/a	n/a	n/a	23.00	n/a	n/a
Other LB Lewisham (south)	13.06	18.93	-0.69	18.25	-3.6%	39.8%
Lewisham Eastern						
Sydenham DC	22.12	33.92	-2.73	31.19	-8.0%	41.0%
Forest Hill DC	39.52	59.20	-2.81	56.40	-4.7%	42.7%
LB Lewisham total	**327.93**	**542.67**	**-8.95**	**556.80**	**-1.6%**	**69.8%**
Outside LB Lewisham						
Surrey Quays/Canda Waters	46.75	61.77	-0.09	61.68	-0.1%	32.0%
Bermondsey	3.87	6.37	0.00	6.37	0.0%	64.8%
Peckham	28.45	47.24	-0.05	47.20	-0.1%	65.9%
West Norwood	14.99	22.23	-0.07	22.17	-0.3%	47.9%
Greenwich	56.43	88.85	-0.67	88.18	-0.8%	56.3%
Bromley	63.15	99.94	-1.49	98.45	-1.5%	55.9%
Crystal Palace	61.33	90.79	-2.14	88.65	-2.4%	44.6%
Penge	6.60	9.67	-0.17	9.50	-1.7%	43.9%
Beckenham	54.65	80.74	-2.18	78.56	-2.7%	43.8%
Dulwich Village	11.13	17.17	-0.12	17.05	-0.7%	53.2%
East Dulwich	41.45	62.73	-0.82	61.90	-1.3%	49.4%
Other outside survey area	267.76	405.51	-4.34	401.17	-1.1%	49.8%
TOTAL	**442.91**	**666.61**	**-9.76**	**656.84**	**-1.5%**	**48.3%**

Table 7 - Future 2035 food/beverage expenditure patterns (£M) - with Bell Green New Town Centre (best case)

Neighbourhood / Zone	1	2	3	4	5	6	7	8	9	10	Total
Expenditure 2035	199.20	228.14	153.18	162.14	81.26	69.10	176.61	179.41	179.33	109.32	**1,537.69**
Lewisham Northern											
Deptford DC	3.59	18.25	0.00	0.97	1.21	0.00	0.00	0.00	0.00	0.00	24.02
New Cross DC	0.00	8.21	0.00	3.56	0.00	0.00	0.00	2.15	2.49	0.00	16.42
Other LB Lewisham (north)	0.00	3.19	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	3.60
Out of centre commitments	29.88	11.41	1.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.82
Sub-total	**33.46**	**41.06**	**1.53**	**4.53**	**1.61**	**0.00**	**0.00**	**2.15**	**2.49**	**0.00**	**86.85**
Lewisham Central											
Lewisham town centre	7.17	20.53	7.81	25.24	1.37	0.00	0.00	0.00	0.71	1.95	64.78
Catford town centre	0.00	4.33	0.00	0.97	4.19	0.34	7.73	0.00	0.00	1.62	19.20
Other LB Lewisham (central)	1.20	21.44	4.44	51.12	3.31	0.00	8.91	14.69	0.89	6.38	112.38
Sub-total	**8.37**	**46.31**	**12.25**	**77.33**	**8.87**	**0.34**	**16.64**	**14.69**	**1.60**	**9.94**	**196.35**
Lewisham Eastern											
Blackheath DC	6.57	4.56	63.41	38.02	12.58	0.83	0.84	0.00	0.00	0.00	126.81
Lee Green DC	0.00	1.14	9.34	0.49	7.10	0.00	0.00	0.00	0.00	0.00	18.07
Sub-total	**6.57**	**5.70**	**72.76**	**38.50**	**19.68**	**0.83**	**0.84**	**0.00**	**0.00**	**0.00**	**144.88**
Lewisham Southern											
Downham DC	0.00	0.00	0.00	0.65	0.32	0.00	0.00	0.00	0.00	0.00	0.97
Bell Green New Town Centre	0.00	0.00	0.00	0.37	0.72	0.35	9.83	0.25	1.24	1.64	14.40
Other LB Lewisham (south)	0.00	7.30	0.00	0.00	1.11	0.24	7.24	0.00	0.00	2.63	18.53
Sub-total	**0.00**	**7.30**	**0.00**	**1.02**	**2.15**	**0.59**	**17.07**	**0.25**	**1.24**	**4.27**	**33.90**
Lewisham Eastern											
Sydenham DC	0.00	0.00	0.00	0.00	0.00	0.00	31.77	0.00	0.53	0.00	32.31
Forest Hill DC	0.00	1.14	0.00	0.00	0.00	0.00	27.40	6.09	0.00	22.91	57.55
Sub-total	**0.00**	**1.14**	**0.00**	**0.00**	**0.00**	**0.00**	**59.18**	**6.09**	**0.53**	**22.91**	**89.86**
LB Lewisham total	**48.40**	**101.52**	**86.54**	**121.38**	**32.31**	**1.76**	**93.73**	**23.18**	**5.87**	**37.13**	**551.83**
Outside LB Lewisham											
Surrey Quays/Canda Waters	54.78	5.93	0.00	0.00	0.00	0.00	1.01	0.00	0.00	0.00	61.72
Bermondsey	6.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.37
Peckham	1.20	39.70	0.61	3.24	0.00	0.96	0.00	0.00	0.00	1.51	47.22
West Norwood	0.00	0.00	0.00	0.00	0.00	0.34	0.00	20.60	1.25	0.00	22.20
Greenwich	14.94	12.78	37.68	8.41	5.56	0.00	6.39	2.15	0.00	0.54	88.45
Bromley	4.58	4.56	0.00	4.04	17.02	51.77	10.09	1.43	4.81	0.76	99.06
Crystal Palace	0.00	0.00	0.00	0.00	0.00	0.00	18.49	30.28	39.89	0.86	89.53
Penge	0.00	0.00	0.00	0.00	0.00	0.00	0.84	0.90	7.84	0.00	9.57
Beckenham	0.00	0.00	0.00	0.00	2.66	2.69	16.98	1.61	53.78	1.73	79.45
Dulwich Village	0.00	4.33	0.00	0.00	0.00	0.00	0.00	6.99	1.78	4.00	17.10
East Dulwich	0.00	15.97	0.00	1.62	0.00	0.00	0.00	3.05	0.00	41.61	62.24
Central London	39.84	21.67	15.93	14.88	12.02	9.98	22.19	47.84	29.21	16.97	230.53
Croydon	0.00	1.14	0.00	0.00	1.05	0.00	1.01	2.87	17.28	0.00	23.34
Brixton	1.99	0.00	0.00	0.00	0.00	0.00	0.00	12.90	0.89	0.54	16.32
Streatham	0.00	1.14	0.00	0.00	0.89	0.00	0.00	11.82	0.00	0.00	13.85
Eltham	0.80	0.00	3.98	1.29	0.73	0.00	0.00	0.00	0.00	1.62	8.42
Other	26.29	19.39	8.42	7.28	9.03	1.58	5.88	13.80	16.74	2.05	110.48
TOTAL	**199.20**	**228.14**	**153.18**	**162.14**	**81.26**	**69.10**	**176.61**	**179.41**	**179.33**	**109.32**	**1,537.69**

Table 8 - Food/beverage impact assessment - Bell Green New Town Centre (best case)

	Base year 2021 turnover £M	Design year 2035 turnover £M	Trade diversion to Bell Green TC £M	Design year 2035 turnover - with Bell Green TC £M	% Impact	Base year v design year % difference
Lewisham Northern						
Deptford DC	13.98	24.03	-0.01	24.02	0.0%	71.8%
New Cross DC	10.34	16.44	-0.03	16.42	-0.2%	58.8%
Other LB Lewisham (north)	2.04	3.60	0.00	3.60	-0.1%	76.5%
Out of centre commitments	n/a	42.82	-0.04	42.82	-0.1%	n/a
Lewisham Central						
Lewisham town centre	42.40	64.88	-0.10	64.78	-0.1%	52.8%
Catford town centre	12.64	19.64	-0.45	19.20	-2.3%	51.8%
Other LB Lewisham (central)	75.13	113.07	-0.69	112.38	-0.6%	49.6%
Lewisham Eastern						
Blackheath DC	84.04	127.04	-0.23	126.81	-0.2%	50.9%
Lee Green DC	11.98	18.12	-0.06	18.07	-0.3%	50.8%
Lewisham Southern						
Downham DC	0.68	0.97	0.00	0.97	-0.4%	41.8%
Bell Green New Town Centre	n/a	n/a	n/a	14.40	n/a	n/a
Other LB Lewisham (south)	13.06	18.93	-0.41	18.53	-2.1%	41.9%
Lewisham Eastern						
Sydenham DC	22.12	33.92	-1.61	32.31	-4.7%	46.0%
Forest Hill DC	39.52	59.20	-1.66	57.55	-2.8%	45.6%
LB Lewisham total	**327.93**	**542.67**	**-5.28**	**551.83**	**-1.0%**	**68.3%**
Outside LB Lewisham						
Surrey Quays/Canda Waters	46.75	61.77	-0.05	61.72	-0.1%	32.0%
Bermondsey	3.87	6.37	0.00	6.37	0.0%	64.8%
Peckham	28.45	47.24	-0.03	47.22	-0.1%	66.0%
West Norwood	14.99	22.23	-0.04	22.20	-0.2%	48.1%
Greenwich	56.43	88.85	-0.39	88.45	-0.4%	56.7%
Bromley	63.15	99.94	-0.88	99.06	-0.9%	56.9%
Crystal Palace	61.33	90.79	-1.26	89.53	-1.4%	46.0%
Penge	6.60	9.67	-0.10	9.57	-1.0%	44.9%
Beckenham	54.65	80.74	-1.29	79.45	-1.6%	45.4%
Dulwich Village	11.13	17.17	-0.07	17.10	-0.4%	53.7%
East Dulwich	41.45	62.73	-0.49	62.24	-0.8%	50.2%
Other outside survey area	267.76	405.51	-2.56	402.94	-0.6%	50.5%
TOTAL	**442.91**	**666.61**	**-5.77**	**660.84**	**-0.9%**	**49.2%**