



Introduction

In 2008, NLP prepared a Quantitative Update of their 2005 Borough-wide Retail Study on behalf of the Council. Subsequently, as a result of known developer interest in creating a new town centre in the Llantrisant Strategic Opportunity Area, a further NLP report considered the implications of and a suitable size for such a centre.

The Quantitative Update originally concluded that:

- In terms of comparison goods, existing commitments absorbed quantitative capacity up to 2016 with capacity emerging thereafter for around 22,000 sqm net across the Borough
- In terms of convenience goods, capacity for around 2,500 sq m net of new floorspace during the plan period was identified.

The Supplementary Report on the Proposed Town Centre in Llantrisant concluded that:

- A new centre of around 28,000 sq m gross of comparison goods floorspace including a new large foodstore would be on the limits of acceptability in terms of impact

The findings of these two reports informed the policies and allocations of the draft LDP.

Since the draft LDP was published there have been material changes to the retail commitments within the Borough, namely in Pontypridd.

This Explanatory Memorandum sets out the implications of this change on the policies and allocations in the draft LDP.

Impact on Comparison Goods Requirements

When considering the changes in committed floorspace, it is first important to recognise the three components that make up 'quantitative need' for new floorspace, namely:

- Growth (or decline) in population
- Growth in expenditure per capita
- The retention rate or market share of expenditure assumed.

The third of these points relates to whether the current retention rate is maintained or increased going forward over the plan period. It can be increased either to make allowance for the impact that the addition of committed floorspace is expected to have on shopping patterns, or as a policy initiative to increase retention if it is considered expedient to do so.

At the time of the 2008 Update a number of commitments for new comparison goods floorspace were included at Table 4A Appendix A. This included 15,336 sq m gross (13,036 sq m net) of comparison goods floorspace at Angharad Walk, Pontypridd. It was estimated that this floorspace



would have a turnover of c.£52 million, with a further £9.7 million of comparison goods turnover generated in the proposed foodstore within the scheme.

This commitment, along with others in Tonypany and Aberdare appeared to meet the quantitative need up to 2016 summarised in Tables 9C and 10C Appendix C of the Retail Study Update.

In October 2009 the Angharad Walk scheme was superseded by planning permission for significantly less floorspace known as the Riverside scheme. The question needs to be asked as to whether there is therefore a quantitative need for this floorspace to be reallocated in the LDP.

Much of the quantitative capacity for the scheme was generated through an assumed uplift in market shares in the Pontypridd area (Zone 3) that would result from the critical mass of floorspace proposed in the Angharad Walk scheme (55% retention from its current 39% retention in Zone 3). This significantly reduced scheme is unlikely to result in an uplift (if anything it will counterbalance the new shopping centre in Cardiff). It would not be appropriate for the uplift assumed in Zone 3 to be transferred to support additional floorspace at Llantrisant beyond that already allocated in the draft LDP.

By removing the commitment and therefore the assumed uplift in retention in Zone 3, there would be quantitative need for around 28,000 sq m net comparison goods floorspace by 2021 across the Borough as a whole. The existing allocations in the draft LDP and the smaller Riverside scheme will meet this need.

Impact on Convenience Goods Requirements

A similar principle applies to the loss of the foodstore commitment within the Angharad Walk scheme in that an uplift in retention rate was assumed in the Pontypridd area (Zone 3). However, if no uplift were assumed and the commitment removed, a quantitative need remains in this zone for around 1,900 sq m net convenience floorspace by 2021. Some of this will be met by the Oxford Street allocation in Mountain Ash (NSA 17(1)), and the remainder can be accommodated on the Brown Lenox allocated site.

We therefore consider that no additional retail allocations need to be made within the draft LDP to respond to the reduced committed floorspace in Pontypridd whilst still meeting the overarching Plan objectives.