

Southwark Retail Study Old Kent Road Update

London Borough of Southwark

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Contents

1.0	Introduction	1
	Background	1
	Objectives of study	2
2.0	Updated Retail Capacity (Class A1)	4
	Introduction	4
	Methodology and Data	4
	Quantitative Capacity for Convenience Floorspace	5
	Quantitative Capacity for Comparison Floorspace	6
3.0	Food and Beverage Uses (Class A3 – A5)	8
	Introduction	8
	Food and Beverage Expenditure	8
	Quantitative Capacity for Food and Beverage Floorspace	8
4.0	Old Kent Road – Now and the Future	10
	Old Kent Road’s Trade Draw	10
	Old Kent Road’s Position in the Hierarchy	14
5.0	Case Study Developments and Workshop	19
	Introduction	19
	Greenwich Peninsula	19
	Earls Court	20
	Vauxhall Nine Elms Battersea, Wandsworth	21
	Lewisham Town Centre	21
	Key Messages from Case Studies and Workshop	22
6.0	Conclusions	24
	Meeting Customer’s Needs in Southwark	24
	Old Kent Road	24

1.0 Introduction

Background

1.1 Lichfields was commissioned by Southwark Council to prepare a Retail Study in 2015. This report provides a Retail Study Update in relation to the Old Kent Road (OKR) opportunity area. This update is part of the evidence base, and will inform work associated with the OKR Area Action Plan (AAP).

1.2 Since the 2015 Retail Study was completed some key additional evidence has been developed or become available. The 2015 study was completed before the OKR capacity testing work was completed by Allies and Morrison in 2016. The OKR Place-Making Study (May 2016) indicated that growth of approximately 20,000 new homes could be accommodated in the 'high scenario' for the OKR opportunity area. This study informed the first and second draft of the AAP, along with more detailed masterplanning of the site allocations in the second draft, which seek to plan for this level of housing growth, as well as an uplift of 10,000 jobs in the area.

1.3 The 2015 Retail Study examined the implications of new retail floorspace within emerging development proposals at Elephant & Castle (E&C) and Canada Water. Both of these centres are expected to grow, which will reduce retail capacity at OKR. Following the submission of a planning application for redevelopment of E&C shopping centre and development of a revised masterplan for Canada Water by British Land, more up-to-date information on the anticipated uplift in retail floorspace in these locations is now available.

1.4 The second draft OKR AAP (December 2017) includes a vision for the transformation of the OKR opportunity area. Policy AAP7 relates to the town centre, leisure and entertainment at OKR. This policy's stated objective is as follows:

"Old Kent Road will be transformed into a lively major town centre providing new shops, restaurants, cafés and local services for people to gather, shop, socialise and spend their leisure time."

1.5 In order to achieve this objective Policy AAP7 indicates the following elements will need to be delivered at OKR:

- 1 a new major town centre, transforming the high street into a new destination which connects neighbourhoods on both sides of the road;
- 2 an attractive and bustling shopping street with entertainment and leisure facilities suitable for people of all ages to spend time in the day and night time;
- 3 a variety of shops and facilities including local independent shops meeting daily needs, as well as large stores such as supermarkets, homeware and hardware on the high street with quieter streets and community spaces behind the Old Kent Road;
- 4 a wide ranging and inclusive network of large and small, independent and institutional arts and cultural spaces and facilities which will provide a foundation for the local community, as individuals or groups, young and old, to provide continuous adult learning; and
- 5 a brand new community health hub meeting the needs of the existing and new population and providing a focus for improving health and promoting healthy active lifestyles.

1.6 More specifically development at OKR is expected to:

- 1 retain or increase the amount of retail uses (A1 use class);
- 2 provide a range of shop sizes including supermarkets;

- 3 provide retail (A Class uses) such as shops, cafés and restaurants;
- 4 provide community, leisure and cultural activities to complement the shops; and
- 5 provide residential development and offices above shops.

1.7 The draft OKR AAP defines a town centre boundary for OKR and proposes two employment hubs. The town centre includes existing and proposed new retail frontages and other commercial uses, as shown in Figure 1.1 below.

Figure 1.1 Old Kent Road Town Centre and High Street



Source: Old Kent Road Area Action Plan (December 2017)

- 1.8 OKR is currently a major comparison goods shopping destination in the Borough, including B&Q, Argos, Currys/PC World and a range of predominantly bulky goods retail units. It attracts over 40% of the total comparison goods turnover of facilities within the Borough.
- 1.9 Given the scale of development proposed in the opportunity area and the proposed transition to a high street format, the nature of the retail offer is likely to change in future. This offer will need to complement the offer of major centres such as E&C and Canada Water and creating a vibrant high street will be critical, both in terms of making the area an attractive place to live and work with a varied cultural, leisure and retail offer.

Objectives of study

- 1.10 This retail study update will inform the next iteration of the OKR AAP. The update assesses the implications of 20,000 new homes in the opportunity area in terms of the quantitative and qualitative need and capacity for the following types of additional retail floorspace:
- convenience goods;
 - comparison goods; and
 - food and beverage (Class A3 to A5).

- 1.11 The study again takes into account the planned growth in nearby centres including Elephant and Castle (E&C) and Canada Water. It re-assesses the impact of the cumulative growth at E&C, Canada Water and OKR.

2.0 Updated Retail Capacity (Class A1)

Introduction

- 2.1 This section re-assesses the quantitative scope for new retail floorspace in Southwark Borough up to 2031. It 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.
- 2.2 All monetary values expressed in this analysis are at 2015 prices unless stated otherwise. The 2015 Retail Study was based on 2012 prices, and therefore the expenditure and turnover figures within the two reports are not directly comparable.

Methodology and Data

- 2.3 The quantitative analysis is based on the study area defined in the 2015 study, re-provided in Appendix 1 of this report. This study area includes parts of neighbouring boroughs including Lewisham, Lambeth and Bromley, and is based on the catchment areas of the main centres in Southwark Borough, which extend beyond the administrative boundary.
- 2.4 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 latest local consumer expenditure estimates for comparison and convenience goods expenditure for the study area for the base year 2015 have been obtained.
- 2.5 Expenditure projections per person for convenience and comparison goods are shown in Table 2 in Appendix 2 and 3, respectively.

Population

- 2.6 Census population estimates for 2011 were obtained and adopted in the 2015 study. Updated population projections to 2014, 2017, 2021, 2026 and 2031 are based on the latest growth projections for Southwark Borough set out in the Preferred Option – Interim 2015 based BPO Projection (GLA 2017) and GLA ward based projections for zones outside Southwark Borough. These projections take into account the OKR AAP preferred option sites.
- 2.7 Population projections are shown in Table 1 in Appendix 2. Population within the study area is projected to increase from 649,726 in 2011 to 840,494 in 2031, 29.4% growth. The end year population projection adopted in the 2015 Retail Study was 773,820 at 2031, 7.9% lower than the updated projection (840,494).

Available Spending

- 2.8 The levels of available spending are derived by combining the population in Tables 1 with per capita spending figures Table 2 for convenience goods in Appendix 2 and comparison goods in Appendix 3.
- 2.9 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 2.10 Special Forms of Trading (SFT) and non-store activity is included within Experian's expenditure estimates, which includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace.

- 2.11 Based on Experian's latest data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3% and 13.2% of total convenience and comparison goods expenditure respectively in 2016. The projections provided by Experian suggest that these percentage shares could increase to 5% and 16.3% by 2031.
- 2.12 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase from £1,296.03 million at 2014 to £1,533.22 million at 2031, as shown in Table 3 in Appendix 2.
- 2.13 The end year convenience goods projection adopted in the 2015 Retail Study was £1,443.47 million at 2031 (£1,502.65 million adjusted to 2015 prices). The previous projection was only slightly lower, despite the significantly lower population growth, because Experian's latest convenience expenditure growth projections are much lower (0.1% per annum compared with 0.6% per annum).
- 2.14 Comparison goods spending is forecast to increase from £1,631.90 million at 2014 to £3,138.85 million at 2031, as shown in Table 3 in Appendix 3. These figures relate to real growth and exclude inflation.
- 2.15 The end year comparison goods projection adopted in the 2015 Retail Study was £3,740.96 million at 2031 (£3,688.59 million adjusted for deflation between 2012 and 2015 prices). The previous projection was 17.5% higher, despite the lower population growth, because Experian's latest comparison expenditure growth projections are lower.

Quantitative Capacity for Convenience Floorspace

- 2.16 The results of the household shopper questionnaire survey, undertaken by NEMS in August 2014 were used to estimate base year shopping patterns within the study area. The base year market shares are shown in Table 4 in Appendix 2.
- 2.17 Table 5 in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Southwark Borough in 2014 is £690.08 million.
- 2.18 The projected levels of available convenience goods expenditure at 2021, 2026 and 2031 are shown at Tables 6 to 8 in Appendix 2, based on constant market shares.
- 2.19 The potential convenience goods turnover of completions between 2014 and 2017 and remaining commitments in the pipeline is shown in Table 9 in Appendix 2. A list of commitments/completions is shown in Appendix 1.
- 2.20 These completions/commitments could provide 19,032 sq.m gross (or 13,322 sq.m net) of convenience goods floorspace with a combined turnover of £159.87 million. The estimated trade draw of these completions/commitments is shown in Table 10 in Appendix 2.
- 2.21 Future convenience goods shopping patterns have been reassessed taking into account the implementation of completions and commitments in Tables 11 to 13 in Appendix 2. The total level of available convenience goods expenditure available for shops/stores in Southwark between 2014 and 2031 is summarised in Table 14 (Appendix 2). The turnover of existing convenience goods floorspace and completions/commitments is subtracted from the estimates of available expenditure to provide surplus expenditure estimates in Table 14.
- 2.22 The projections suggest the implementation of completions/commitments will create an expenditure deficit of -£63.49 million, if all commitments are implemented by 2021. Continued population and expenditure growth will reduce this deficit to -£15.03 million by 2026. Longer term growth between 2026 and 2031 will generate an expenditure surplus of £23.45 million at 2031. The estimates of surplus/deficit expenditure are converted into net floorspace projections

in Table 15, Appendix 2. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores.

- 2.23 The long term expenditure surplus could support new convenience goods retail floorspace, over and above commitments. The long term convenience goods floorspace projection for Southwark Borough is 1,954 sq.m net (2,791 sq.m gross).
- 2.24 The 2015 Retail Study convenience goods floorspace projection was higher with 5,280 sq.m net (7,543 sq.m gross) up to 2031. The updated floorspace projection is lower (1,954 sq.m net or 2,791 sq.m gross) due to Experian's lower forecast expenditure growth and the expected implementation of additional commitments.

Quantitative Capacity for Comparison Floorspace

- 2.25 Southwark Borough attracted £530.1 million of comparison goods expenditure in total in 2014 (Table 5 in Appendix 3). The future level of comparison goods expenditure available to shops in Southwark Borough has been projected to 2021, 2026 and 2031, as shown in Tables 6 to 8 in Appendix 3, based on constant market shares.
- 2.26 The potential comparison goods turnover of completions between 2014 and 2017 and remaining commitments in the pipeline is shown in Table 9 in Appendix 3. A list of commitments/completions is shown in Appendix 1.
- 2.27 These completions/commitments could provide 29,677 sq.m gross (or 22,256 sq.m net) of comparison goods floorspace with a combined turnover of £127.83 million. The estimated trade draw of these completions/commitments is shown in Table 10 in Appendix 3.
- 2.28 Future comparison goods shopping patterns have been reassessed taking into account the implementation of completions and commitments in Tables 11 to 13 in Appendix 3. The total level of available comparison goods expenditure available for shops/stores in Southwark between 2014 and 2031 is summarised in Table 18 (Appendix 3). The turnover of existing comparison goods floorspace and completions/commitments is subtracted from the estimates of available expenditure to provide surplus expenditure estimates in Table 18.
- 2.29 The projections suggest the implementation of completions/commitments will absorb most of the expenditure growth up to 2021. There is a small surplus at 2021 (£14.49 million), if all commitments are implemented. Continued population and expenditure growth will increase this surplus to £115.31 million by 2026. Longer term growth between 2026 and 2031 will generate an expenditure surplus of £237.17 million at 2031.
- 2.30 The estimates of surplus expenditure are converted into net floorspace projections in Table 19, Appendix 3. The growth projections could support 2,523 sq.m net (3,364 sq.m gross) and above commitments at 2021. This is projected to increase to 18,185 sq.m net (24,247 sq.m gross) by 2026 and 33,875 sq.m net (45,166 sq.m gross) by 2031.
- 2.31 These floorspace projections do not take into account emerging development proposals at Canada Water and the Aylesham Centre in Peckham that do not currently have planning permission. The uplift in comparison goods retail floorspace is estimated to be around 31,500 sq.m gross at Canada Water and 4,900 sq.m gross at Peckham. This additional floorspace could have a combined comparison goods turnover of £173.11 million in 2026, as shown in Table 14 in Appendix 3.
- 2.32 The estimated trade draw of these two proposals is shown in Table 15 in Appendix 3. Future comparison goods shopping patterns have been reassessed taking into account the implementation of completions, commitments and the two additional proposals in Tables 16 and 17 in Appendix 3. The adjusted total level of available comparison goods expenditure

available for shops/stores in Southwark is summarised in Table 20 (Appendix 3). The turnover of existing comparison goods floorspace, completions/commitments and proposals is subtracted from the estimates of available expenditure to provide surplus expenditure estimates in Table 20.

- 2.33 The revised estimates of surplus expenditure are converted into net floorspace projections in Table 21, Appendix 3. The revised growth projections suggest completions/commitments and the two proposals will absorb expenditure growth up to 2026. Longer term growth could support 16,303 sq.m net (21,739 sq.m gross) between 2026 and 2031, over and above completions/commitments and two proposals.

3.0 **Food and Beverage Uses (Class A3 – A5)**

Introduction

3.1 This section assesses the potential for Class A3 to A5 food/beverage uses in Southwark Borough.

Food and Beverage Expenditure

3.2 Experian's food and beverage expenditure per capita projections are shown in Table 2 in Appendix 4. The total food and beverage expenditure in the study area is £950.18 million in 2014, see Table 3 in Appendix 4.

3.3 As a consequence of growth in population and per capita spending, food and beverage expenditure within the study area is forecast to increase from £950.18 million at 2014 to £1,441.24 million at 2031, as shown in Table 3 in Appendix 4.

3.4 The end year food and beverage expenditure projection adopted in the 2015 Retail Study was £1,251.67 million at 2031 (£1,309.25 million adjusted to 2015 prices). The previous projection is slightly lower due to lower population growth.

3.5 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2014) penetration rates are shown in Table 4 in Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure attracted to facilities within Southwark Borough is £347.21 million in 2014.

Quantitative Capacity for Food and Beverage Floorspace

3.6 Southwark Borough attracted £347.21 million of food and beverage expenditure in total in 2014 (Table 5 in Appendix 4). The future level of food and beverage expenditure available to outlets in Southwark Borough has been projected to 2021, 2026 and 2031, as shown in Tables 6 to 8 in Appendix 4, based on constant market shares.

3.7 The potential food and beverage turnover and trade draw of completions and commitments are shown in Table 9 in Appendix 4. A list of commitments/completions is shown in Appendix 1. These completions/commitments could provide 18,271 sq.m gross of food and beverage floorspace with a combined turnover of £97.96 million in 2021.

3.8 Future food and beverage spending patterns have been reassessed taking into account the implementation of completions and commitments in Tables 10 to 12 in Appendix 4. The total level of available food and beverage expenditure available for outlets in Southwark Borough between 2014 and 2031 is summarised in Table 16 (Appendix 4). The turnover of existing food and beverage floorspace and completions/commitments is subtracted from the estimates of available expenditure to provide surplus expenditure estimates in Table 16.

3.9 The projections suggest the implementation of completions/commitments will absorb most of the expenditure growth up to 2021. There is a small expenditure surplus expected at 2021 (£9.84 million), if all commitments are implemented. Continued population and expenditure growth will increase this surplus to £60.4 million by 2026. Longer term growth between 2026 and 2031 will generate an expenditure surplus of £100.93 million at 2031.

3.10 The estimates of surplus expenditure are converted into net floorspace projections in Table 17, Appendix 4. The growth projections could support 1,836 sq.m gross over and above commitments at 2021. This is projected to increase to 10,721 sq.m gross by 2026 and 17,045 sq.m gross by 2031.

- 3.11 These floorspace projections do not take into account emerging development proposals at Canada Water and the Aylesham Centre in Peckham that do not currently have planning permission. The uplift in food and beverage floorspace is estimated to be around 13,500 sq.m gross at Canada Water and 2,100 sq.m gross at Peckham. This additional floorspace could have a combined food and beverage turnover of £87.89 million in 2026, as shown in Table 13 in Appendix 4.
- 3.12 The estimated turnover and trade draw of these two proposals is shown in Table 13 in Appendix 4. Future food and beverage spending patterns have been reassessed taking into account the implementation of completions, commitments and the two additional proposals in Tables 14 and 15 in Appendix 4. The adjusted total level of available food and beverage expenditure available for outlets in Southwark Borough is summarised in Table 18 (Appendix 4). The turnover of existing food and beverage floorspace, completions/commitments and proposals is subtracted from the estimates of available expenditure to provide surplus expenditure estimates in Table 18.
- 3.13 The revised estimates of surplus expenditure are converted into gross floorspace projections in Table 19 in Appendix 4. The revised growth projections suggest completions/commitments and the two proposals will absorb most of the expenditure growth up to 2026. Longer term growth could support 8,415 sq.m gross by 2031, over and above completions/commitments and two proposals.

4.0 Old Kent Road – Now and the Future

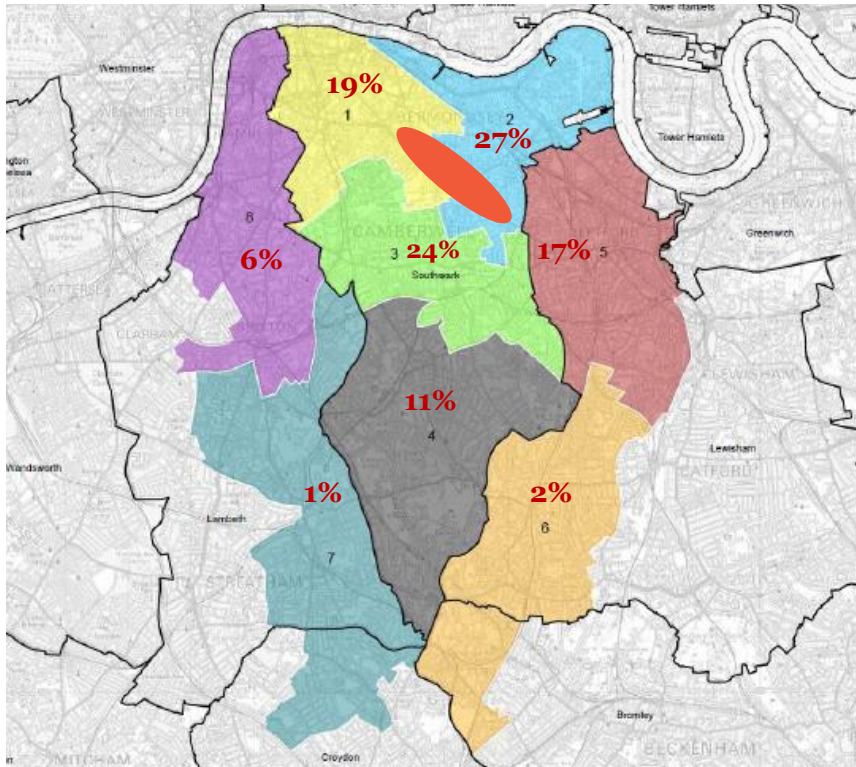
Existing Retail Facilities

- 4.1 The Council's Business Atlas identifies 315 retail commercial premises within the OKR area, of which 274 units were occupied. Total floorspace is about 93,000 sq.m GEA, including Class A1 to A5 uses, D2 leisure, hotel and wholesale space. This includes around 10,000 sq.m of vacant floorspace. The current retail floorspace vacancy rate is 11%.
- 4.2 The six main food stores (Aldi, Asda, Iceland, Lidl, Tesco and Tesco Express) within the OKR opportunity area total around 16,000 sq.m GIA with a net sales area of around 9,400 sq.m net (source – ORC's Storepoint). Approximately 7,200 sq.m net of the sales floorspace is devoted to the sales of convenience goods and 2,200 sq.m net is devoted to comparison goods.
- 4.3 In addition to the main food stores there are about 30 other convenience goods outlets at OKR. These outlets are predominantly small independent traders, including grocers, off licences, newsagents and ethnic food shops. These convenience shops total around 3,000 sq.m GIA (2,000 sq.m net).
- 4.4 Retail warehouse operators (excluding wholesale outlets) at OKR have a total floorspace of about 22,300 sq.m GIA (19,000 sq.m net), including B&Q, Toys R Us and DFS (source – Valuation Office/Completely Retail). There are around 35 other comparison goods outlets at OKR totalling 4,000 sq.m GIA (2,500 sq.m net).
- 4.5 There are a large number (over 80) of food and beverage outlets (Class A3 to A5) totalling around 10,000 sq.m GIA. About half of these food and beverage outlets are hot food takeaways. There are a small number of bars/public houses. There are about 80 other non-retail services (Class A1 and A2) totalling 6,500 sq.m GIA.
- 4.6 Based on Valuation Office/Completely Retail data, the total occupied Class A1 to A5 floorspace at OKR totals about 64,500 sq.m GIA split:
- Class A1 retail = 45,300 sq.m GIA
 - Class A1 service/A2 = 6,500 sq.m GIA
 - Class A3 to A5 = 10,000 sq.m GIA
- 4.7 The retail net sales floorspace totals 32,900 sq.m net, of which 9,200 sq.m is convenience goods sales and 21,500 sq.m net is comparison goods sales.
- 4.8 Small shop premises (50 to 100 sq.m GIA) within OKR tend to command rents of between £200 to £250 per sq.m, with a Zone A rent of £350 to £400 per sq.m. The rents for retail units vary from £230 to £375 per sq.m.

Old Kent Road's Trade Draw

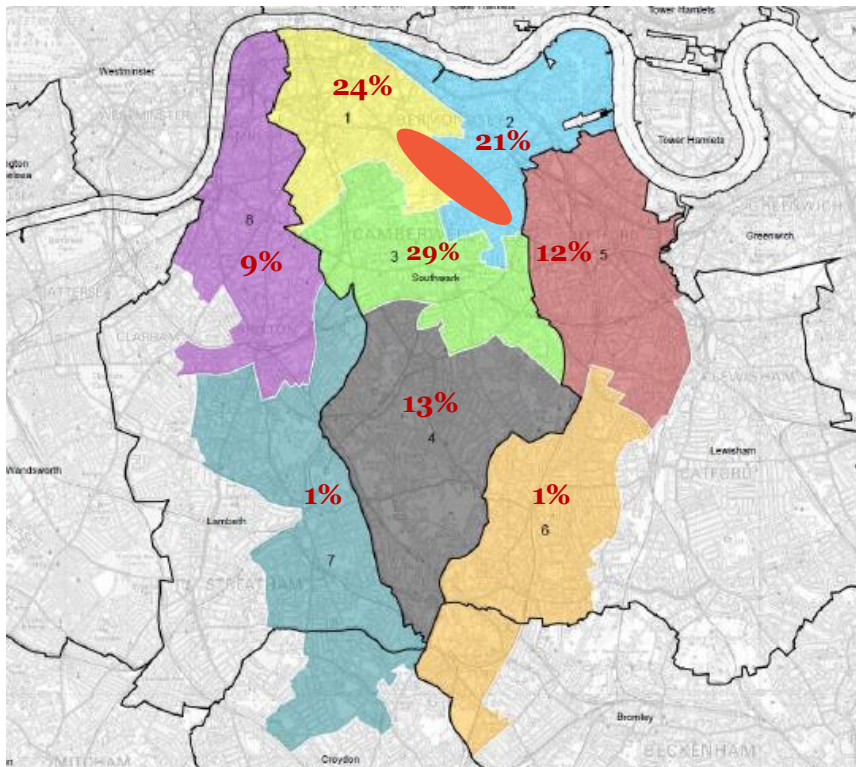
- 4.9 The household shopper survey undertaken within the 2015 Retail Study provides an indication of the OKR's trade draw and the extent of its current catchment area for food/grocery shopping (convenience goods), non-food (comparison goods) and eating and drinking (food and beverage).
- 4.10 The OKR's current market shares of expenditure within each study area zone are shown in Figures 4.1 to 4.3 overleaf.

Figure 4.1 Old Kent Road's market share of convenience goods expenditure (% of total residents' expenditure in each zone)



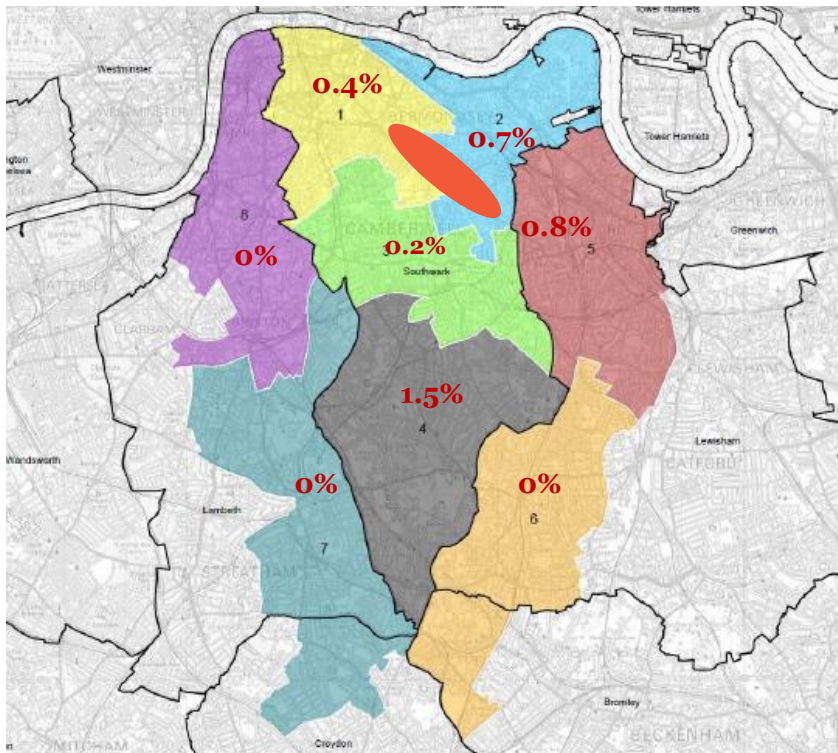
Source: NEMS Household Survey 2015 and Lichfields' analysis

Figure 4.2 Old Kent Road's market share of comparison goods expenditure (% of total residents' expenditure in each zone)



Source: NEMS Household Survey 2015 and Lichfields' analysis

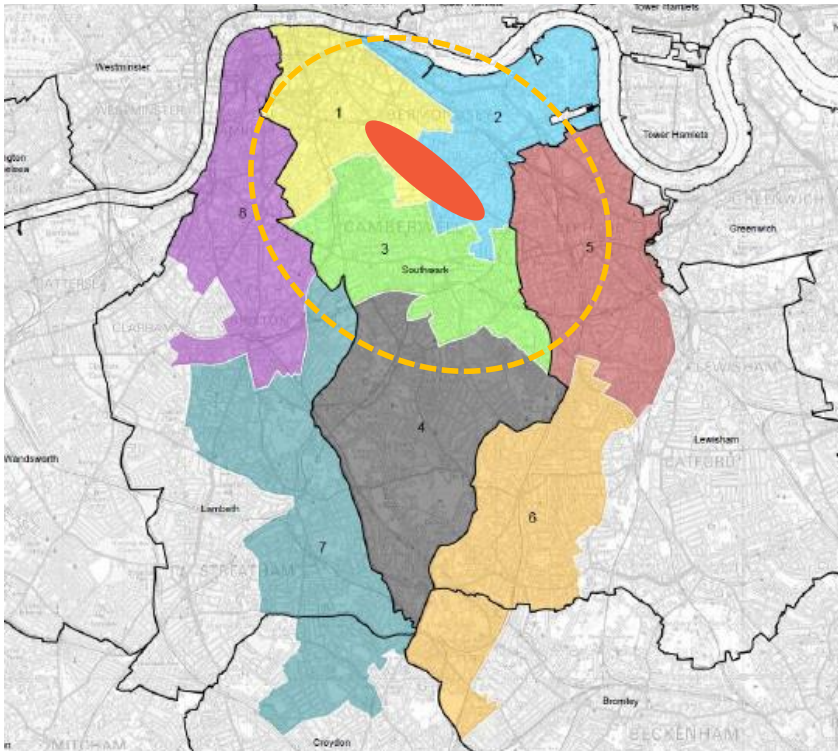
Figure 4.3 Old Kent Road's market share of food/beverage expenditure (% of total residents' expenditure in each zone)



Source: NEMS Household Survey 2015 and Lichfields' analysis

- 4.11 The household shopper survey results suggest the OKR has a similar pattern of trade draw and market penetration for both convenience and comparison goods shopping, suggesting the OKR is an important destination for both forms of shopping. This dual role should be maintained and enhanced in the future.
- 4.12 Figure 4.3 suggests the OKR has a much more limited role as an eating and drinking destination. This role could be significantly enhanced in the future, particularly in relation to the evening economy. The current food and beverage provision is dominated by hot food takeaways and cafés, rather than restaurants and bars.
- 4.13 Based on the results shown in Figures 4.1 to 4.3, the indicative primary catchment area of the OKR is shown in Figure 4.4 overleaf. The OKR predominantly serves the northern half of Southwark Borough, but its primary catchment area extends into neighbouring authorities, i.e. Lewisham and Lambeth. Its primary catchment area is akin to Major Centres within South East London, such as Peckham, Lewisham and Brixton, and is more extensive than District Centres.

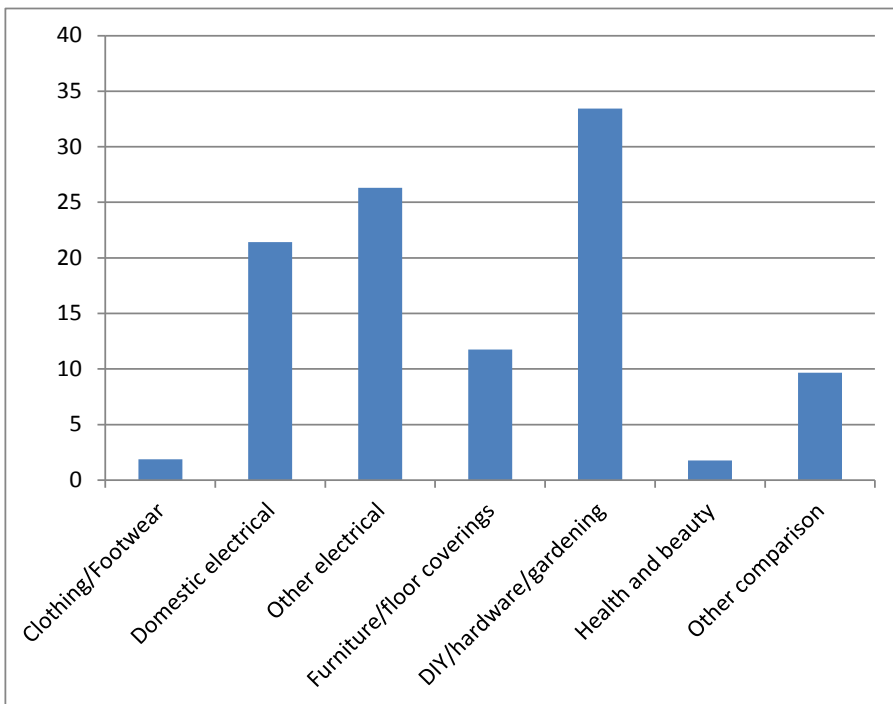
Figure 4.4 Old Kent Road’s Indicative Primary Catchment Area for Shopping



4.14

The OKR’s market share of total available comparison goods expenditure within the study area is broken down by goods categories in Figure 4.5. This graph demonstrates OKR’s strength as a bulky goods comparison shopping destination i.e. electrical, furniture, floorcoverings and DIY. OKR has a more limited draw for fashion shopping.

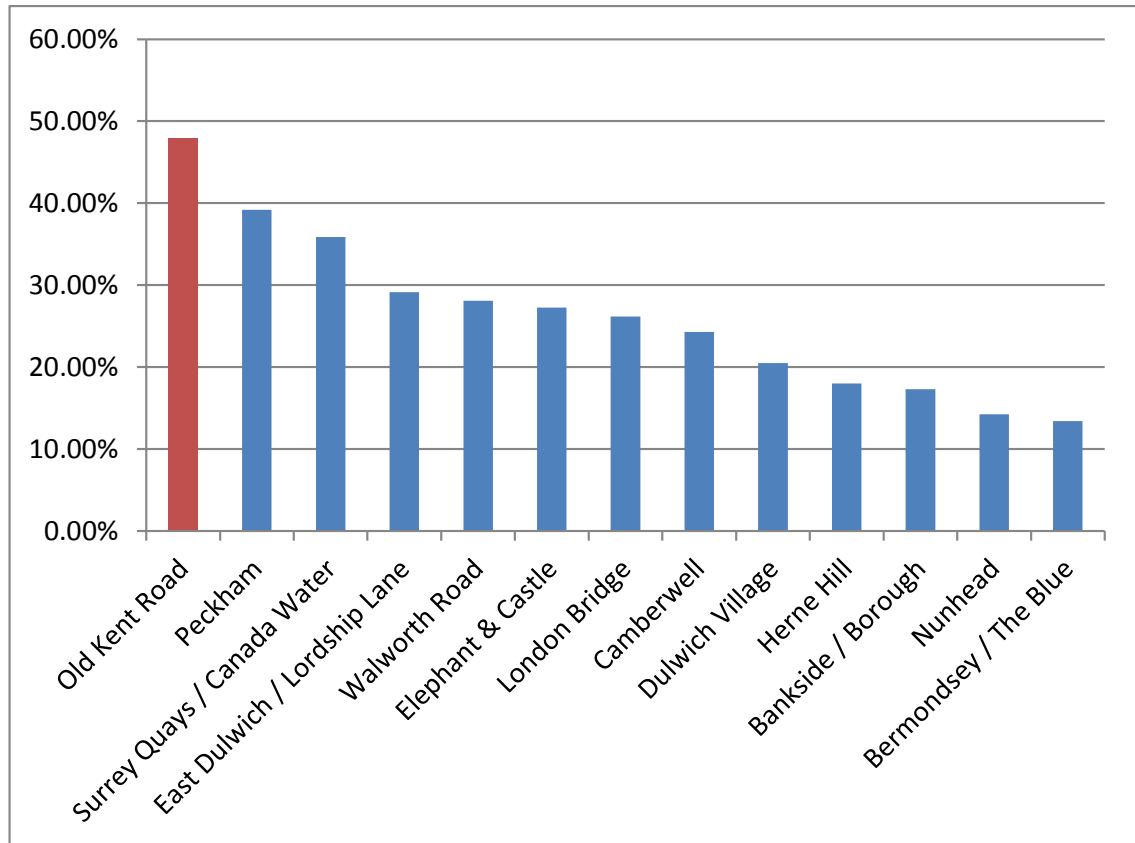
Figure 4.5 Old Kent Road’s market share of comparison expenditure (% of total residents’ expenditure in study area)



Source: NEMS Household Survey 2015 and Lichfields’ analysis

4.15 Respondents interviewed in the household survey were asked which of the main shopping destinations in Southwark Borough they had visited to shop within the past 12 months. The results are shown in Figure 4.6. These survey results demonstrate that the OKR is the most visited shopping destination in the Borough, followed by Peckham and Surrey Quays/Canada Water.

Figure 4.6 Shopping destinations in Southwark Borough visited during the last 12 months (% of all respondents)



Source: NEMS Household Survey 2015

Old Kent Road’s Position in the Hierarchy

The London Plan 2016 and Draft London Plan 2017

4.16 OKR’s position in the shopping hierarchy in practical terms needs to be considered. The London Plan 2016, and emerging draft London Plan (December 2017) provides different classifications for centres and commercial areas within London. The London Plan provides a helpful description of how the shopping network functions in London.

4.17 Policy 2.15 of the London Plan 2016 seeks to coordinate the development of London’s network of town centres, as the main foci for commercial development and intensification. Changes to the network including designation of new centres or extension of existing ones, should be coordinated strategically with relevant planning authorities. Identified deficiencies in the network of town centres can be addressed by promoting centres to function at a higher level in the hierarchy or by designating new centres where necessary, giving particular priority to areas with particular needs for regeneration.

4.18 The London Plan 2016 goes on to provide strategic guidance on the broad future direction envisaged for town centres including their possible potential for growth and regeneration. Some

centres are identified as being in need of regeneration, whilst some centres are identified as having potential for high growth, i.e. town centres likely to experience strategically significant levels of growth with strong demand and/or large scale retail, leisure or office development in the pipeline and with existing or potential public transport capacity to accommodate it.

- 4.19 The Central Activity Zone (CAZ) covers the main commercial area in central London and includes a number of shopping areas (CAZ Frontages) e.g. Oxford Street, Covent Garden, Marylebone High Street and Tottenham Court Road. Beyond the CAZ, the London Plan identifies five broad types of town centre, i.e. International, Metropolitan, Major, District and Neighbourhood/Local.
- 4.20 Metropolitan, Major, District and Neighbourhood/Local centres as defined in the London Plan vary in size and perform different but complementary roles. Each centre performs at a different tier in the shopping hierarchy, although the catchment areas overlap. In general, centres will compete with other similar centres within the same tier.
- 4.21 Bromley and Croydon are the only Metropolitan Centres serving the south and south east London. Peckham is the main centre in Southwark Borough and is defined as a Major Centre in the London Plan, and also in the Southwark Core Strategy. The London Plan indicates Peckham has medium potential for growth but is in need of regeneration. Lewisham and Catford are also London Plan Major Centres within Lewisham Borough. Lewisham has high potential for growth in the London Plan Lambeth Borough is also served by two Major Centres at Brixton and Streatham. The Draft London Plan 2017 suggests Lewisham has the potential to become a Metropolitan Centre in the future.
- 4.22 Within the London Plan 2016, Southwark Borough has five District Centres i.e. Lordship Lane, Elephant & Castle, Canada Water, Walworth Road and Camberwell. The London Plan indicates that both Elephant & Castle and Canada Water have high potential for growth and are in need of regeneration. The Southwark Core Strategy 2011 designates Elephant & Castle/Walworth and Canada Water as Major Town Centres. The Draft London Plan endorses this approach with Elephant & Castle/Walworth identified as a Major Centre and Canada Water has the potential to become a Major Centre in the future.
- 4.23 OKR is not designated as a town centre within the London Plan 2016 or the Core Strategy, despite the scale of retail floorspace and facilities provided in this area. However OKR is identified as a new Major Centre within the New Southwark Plan – Preferred Options. OKR is identified as an opportunity area in the London Plan. The draft London Plan 2017 now suggests two areas on the OKR could have the potential to become District Centres in the future at OKR/East Street and OKR/Peckham Park Road.

The Javelin Group's Venuescore

- 4.24 Venuescore ranks the UK's over 3,500 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present; the score attached to each retailer is weighted depending on their overall impact on shopping patterns. This Javelin information is widely used in the retail industry to assess the relative strength of shopping destinations.
- 4.25 The results for destinations in the borough and other relevant centres are shown in Table 4.1.
- 4.26 Venuescore index ranks London Bridge and Peckham as the main centre within the Borough, ranked 244th and 312th out of all centres in the UK. The West End in central London is ranked at the top end of the hierarchy. Croydon and Bromley have high Venuescores of around 300, consistent with their London Plan classification as Metropolitan Centres. Docklands (Canary

Wharf) has the next highest score of 229, which appears to be consistent with the Draft London Plan's proposal to elevate Canary Wharf from a Major Centre to a Metropolitan Centre.

Table 4.1 Venuescore UK Shopping Index and UK Rank and London Plan Designation

Destination (London Plan name in brackets)	UK Rank	Venuescore	London Plan Classification
West End	1	1,625	International
Croydon	23	328	Metropolitan
Bromley	38	286	Metropolitan
Docklands (Canary Wharf)	57	229	Major
Lewisham	181	133	Major
Brixton	242	104	Major
London Bridge	244	103	CAZ
Peckham	312	86	Major
Walworth	374	75	District
Catford	508	58	Major
Surrey Quays (Canada Water)	537	56	District
Bankside	781	40	CAZ
Tower Bridge	879	36	CAZ
Camberwell	1008	32	District
Elephant & Castle	1368	23	District
Old Kent Road	1418	22	n/a
Southernwood Retail Park (OKR)	1481	21	n/a
East Dulwich (Lordship Lane)	1559	20	District
Cantium Retail Park (OKR)	1775	17	n/a
Borough	2377	13	CAZ
Tower Bridge Road	2377	13	CAZ

Source: Javelin Group's Venuescore 2017 and London Plan 2016

OKR destinations in **BOLD**

- 4.27 London Bridge and Peckham have Venuescores of 103 and 86 points. London Bridge falls within the Central Activity Zone (CAZ). Peckham is a Major Centre in the London Plan, consistent with the score of 86.
- 4.28 Walworth's score of 75 and merger with Elephant & Castle is consistent with the draft London Plan 2017 proposals to elevate this area to a Major Centre. Surrey Quays (Canada Water) score of 56 and proposals to improve the centre are consistent with the potential to reclassify it as Major Centre, as identified in the draft London Plan. This analysis is also consistent with Elephant & Castle and Canada Water's designation as major town centres in Southwark's adopted development plan.
- 4.29 OKR is identified by Javelin as having three separate retail destinations, including the two main retail parks. Excluding the two retail parks, OKR has a Venuescore of 20 and could already be considered to be comparable within other District Centres classified in the London Plan e.g. Dulwich /Lordship Lane (also 20 points). The combined Venuescore of the three areas at OKR is 60, which higher than the Major Centre at Catford (58 points).

Old Kent Road's Future Classification

- 4.30 The London Plan's network of shopping centres indicates that centres with up to 10,000 sq.m gross of Class A1-A5 floorspace are of local significance only, and they have relatively small catchment areas i.e. they serve the day to day needs of local residents or employees. These types of centres tend to focus on food and grocery shopping, non-retail services and a very limited

provision of comparison shopping focusing on lower order goods purchased on a day to day basis.

- 4.31 Classified District Centres in London vary significantly in terms of size, usually 10,000 to 50,000 sq.m gross of Class A1-A5. Smaller district centres within this range tend to be anchored by a large food store, supported by smaller shops and services. The provision of comparison shops tends to focus on lower order goods and the choice of shops is generally limited.
- 4.32 Larger shopping centres also provide day to day shops and services, but also have a stronger focus on higher order comparison shopping. Higher order comparison goods tend to be higher value goods purchased on a more occasional basis, where customers will want to browse and compare produce. A wide range and choice of shops and products is required to successfully attract higher order comparison shops. A critical mass of shops and services is required to attract sufficient numbers of customers to make the comparison shopping destination successful.
- 4.33 The redevelopment of OKR will need to compete with other large centres within and outside the Borough. The scale of Class A uses already located at OKR (64,500 sq.m gross) represents a significant concentration of the facilities, above the size range for designated District Centres within London as outlined above.
- 4.34 By way of comparison with the definitions of centre designations, the scale of floorspace at OKR is more closely aligned with the Major rather than District centre tier within the London hierarchy. The London Plan describes these centres as follows:
- "Major centres - typically found in inner and some parts of outer London with a borough wide catchments. They generally contain over 50,000 sq.m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.*
- District centres - distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sq.m of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions."*
- 4.35 The amount of Class A floorspace currently at OKR is above the range for a District Centre, and is aligned with the range for Major Centres. Where the total amount of floorspace exceeds 50,000 sq.m, one would normally expect to find a good choice of comparison shops selling higher order comparison goods, supported by convenience goods shopping and non-retail services (Class A2 to A5 uses). These larger centres provide a broad mix of uses, retail, services and leisure.
- 4.36 In relative terms the London Plan's description for Major Centres perhaps best describes what is currently provided at OKR, although these uses are somewhat fragmented and retail frontages stretch over 3 kilometres along OKR. The quantum of retail floorspace is dominated by retail warehouses and large foods stores, which make up nearly 60% of total Class A floorspace at OKR. The main concentration of large stores is located within the central section of OKR. Streatham is an example of a long linear centre designated as a Major Centre, but the centre is not dominated by large stores or retail parks.
- 4.37 The draft OKR AAP proposes to designate the OKR as a Major Town Centre in the form of a linear high street with a concentration of larger units/supermarkets and potential for retail in squares and secondary streets off the OKR. The vision for OKR is to provide a more attractive, sustainable retail destination. This will involve replacing the large stores with extensive areas of

surface car parking. The new Major Town Centre is expected to be integral the neighbourhood with significantly more homes, employment and social infrastructure.

4.38 These regeneration proposals will help to ensure OKR provides the required critical mass and broader mix of uses, i.e. a level of provision that will allow OKR to compete with Major Centres alike. In particular development opportunities can provide a good range and choice of comparison goods and convenience goods shopping, complemented with the provision of Class A3 - A5 food/beverage and leisure provision.

4.39 The central section of OKR, which has the main concentration of large box-like stores, provides the best opportunity to accommodate these regenerations proposals and the New Major Town Centre. The smaller shop premises along the remainder of OKR are likely to continue to perform a local function, providing shops and services to residents who live within walking distance.

5.0 **Case Study Developments and Workshop**

Introduction

- 5.1 This section provides an overview of case studies from recent or pipeline major high density mixed use developments located within inner London Boroughs. It also summarises feedback from a stakeholder workshop attended by landowners, developers and operators with an interest in the future of OKR. The purpose of this research was to gain further understanding of current forms of high density retail coming forward in similar locations, which should help guide future development at OKR. The analysis focuses on the scale and format of retail and leisure uses and the inclusion of affordable premises. The workshop also provided initial feedback on the draft OKR AAP.

Greenwich Peninsula

- 5.2 Outline planning permission was granted in 2015 for the Greenwich Masterplan (application ref: 15/0716). The proposals cover an area of 79ha and will be delivered over the next 20 years comprise:
- up to 12,678 residential dwellings and up to 220 serviced apartments;
 - Class A1-A5 use (food and non-food retail, restaurants, bars and cafés) up to 23,475 sq.m;
 - Class B1 (business) up to 59,744 sq.m;
 - Hotel up to 35,999 sq.m for up to 500 rooms;
 - Class D1 (education facilities) up to 37,900 sq.m;
 - Class D1 (health care facilities) up to 1,462 sq.m;
 - Class D1/D2 (visitor attraction) up to 19,526 sq.m.;
 - sui generis use for film and media studios up to 38,693 sq.m; and
 - a maximum of 2,000 car parking spaces.
- 5.3 In terms of the Class A1-A5 uses, the proposed floorspace is primarily focused within a new North Greenwich District Centre (NGDC), with the Retail/Transport Hub accommodating about 16,900 sq.m of Class A1 to A5, about 70% of total retail floorspace. The majority of the remaining 6,600 sq.m, around 4,700 sq.m, will be located in development blocks immediately adjacent to the Hub. The Hub and adjacent blocks will incorporate retail floorspace at ground/lower level with a mixed use tower above.
- 5.4 A small element of retail use (about 1,900 sq.m) will be spread within residential development blocks, located outside the NGDC. These local facilities will primarily serve the day to day needs of residents and workers within Greenwich Peninsula.
- 5.5 The first Reserved Matters were submitted in July 2017 for a plot within the District Centre, which includes 16 new buildings composed as ‘a fine grained pedestrian quarter’ around a new District Square.
- 5.6 Separate to Knightdragon’s proposals for Greenwich Peninsula, there is also planning permission for 21,239 sq.m A1 floorspace, located within the O2 arena, but also within the NGDC. This retail floorspace is in the form of a designer retail outlet, plus 5,002 sq.m of F&B (application refs: 02/2903/O 11/3033/O and 14/1486/O). Reserved matters were approved in 2015. The layout of the retail floorspace includes 70 units spread over 2 levels.

- 5.7 In total the NGDC is expected to accommodate over 40,000 sq.m gross of Class A1 to A5 floorspace.

Earls Court

- 5.8 Outline planning permission was granted for the redevelopment of the Earls Court site in 2013 (LBHF ref:2011/02001/O). The objective of the Earls Court development is to provide a retail, leisure and office quarter at the heart of a new centre within the Earl's Court & West Kensington Opportunity Area. The retail element will serve both local residents/workers, as well as bringing forward unique independent boutiques, furniture shops and antiques shops etc. The proposals include:

- 6,775 residential units;
- Class A1-A5 use up to 29,430 sq.m;
- offices totalling 120,615 sq.m;
- hotel up to 19,023 sq.m;
- leisure up to 14,109 sq.m;
- hospital (11,687 sq.m); and
- education/community/health/culture (18,221 sq.m);
- ancillary including parking/plant (164,162 sq.m).

- 5.9 The retail and leisure floorspace is expected to be phased over a 12 year period within 6 main phases. The following split between Class A1 convenience, Class A1 comparison and Class A3-A5 is envisaged:

- convenience goods Class A1 = up to 5,000 sq.m gross;
- comparison goods Class A1 = up to 15,000 sq.m gross;
- food & beverage Class A3-A5 = 9,430 sq.m gross

- 5.10 The composition of the retail floorspace is unclear in terms of unit sizes and operators, and this will be determined at the letting stage, i.e. closer to the date of opening of the various phases of the scheme. The following guiding masterplan and commercial principles were provided at outline stage to determine the composition of the additional retail floorspace:

“The scheme will create a new 21st Century High Street, providing a hub and a focus for the scheme, linking it to its surrounding local area and the existing a proposed transport links.

Rather than being a destination in its own right, the High Street area is likely to incorporate the types of retail that will be essential for the everyday needs residents and workers within Earls Court scheme. It is important not to forget the proximity to the two main shopping centres in London, Westfield London and the West End. Furthermore, Knightsbridge and Harrods are just four stops away on the Piccadilly line. As a result, the focus will be on convenience and niche comparison retail as clearly the market for mainstream multiple large scale retail is already met in these existing locations. Put simply, it is considered that there is no market potential for a large scale comparison goods scheme in this location.

Therefore, the strategy for the Earls Court development is to in no way replicate or compete with the existing higher order centres, but instead provide retailers who will complement the existing shopping provision and serve the immediate residents and office workers, helping to create a place. Furthermore, it is seen as key to complement the existing retail offer on North End Road, which provides a valuable facility for local residents.”

5.11 For these reasons the provision of comparison goods retail is restricted to not more than 15,000 sq.m gross.

5.12 In terms of unit sizes the Reserved Matters for the first phase includes 4,895 sq.m gross of commercial floor space (Use Class A1-A5), including 8 retail units. The retail units a medium to large in size ranging from 239 sq.m gross to 1,898 sq.m gross.

Vauxhall Nine Elms Battersea, Wandsworth

5.13 The New Covent Garden Market site (application ref: 2011/4664) is part of the Vauxhall Nine Elms Battersea (VNEB) development are. It covers 24.57 hectares and comprises five different development zones. In addition to the replacement wholesale market garden (93,240 sq.m) the proposed uses include:

- Residential and serviced apartments (up to 225,018 sq.m);
- Class A1 retail (up to 7,800 sq.m gross);
- Flexible 'Retail' Class A1 to A5 (up to 4,284 sq.m gross);
- Flexible business, community and leisure (2,903 sq.m);
- Gym (2,403 sq.m);
- Hotel (11,289 sq.m); and
- Basement, Energy Centre, Parking (79,937 sq.m).

5.14 The retail development is focused in zones 1-3, including the Northern Site Development Zone, which includes a linear park as a central feature, along with an active retail frontage on Wandsworth Road and Nine Elms Lane. The south podium has been designed to enable a large retailer to be accommodated, such as a food store. This could provide a store of up to 2,850 sq.m at ground floor level, with additional mezzanine floorspace. Retail uses are provided at the ground levels within five separate blocks/towers. The precise mix of the Class A1-A5, B1 and D1/D2 uses has yet to be agreed. This will be determined at the reserved matters stage to ensure that the development is viable and that an appropriate mix of activities is provided to support the population and visitors to the area.

5.15 Also within the VNEB area, planning permission has been granted to redevelop the existing Sainsbury's food store on Wandsworth Road. The new development involves the demolition of the existing retail store and petrol station. The replacement food superstore totals (13,200 sq.m gross) plus an energy centre (779 sq.m); flexible retail/community floorspace (787 sq.m); office floorspace (1,860 sq.m) and 645 residential units with ancillary gym arranged in seven blocks.

5.16 The outdated Sainsbury's store was a freestanding single storey superstore opened in 1982 with surface car parking, totalling 6,418 sq.m, less than half the proposed replacement store. The new store has basement and ground floor level car parking providing 363 customer spaces, plus 148 spaces for the residential units, with public realm and residential towers above and surrounding. The remaining retail space is proposed to be split across 8 units set around a new public square/public realm.

Lewisham Town Centre

5.17 The redevelopment of Lewisham, primarily the area adjacent to Lewisham Station, includes a number of major developments recently completed or now under-construction, including:

- 104-120 Lee High Road - five-storey development with Lidl food store (1,743 sq.m gross) and 70 flats (complete);

- Loampit Vale, Lewisham. - eight buildings (5 - 24 storeys) including a leisure centre, shops and 788 flats (complete);
- Lewisham Gateway, Lewisham High Street - £250 million housing, retail and leisure development (under construction);
- Thurston Road Industrial Centre - two buildings (up to 17 storeys) including retail units, a garden centre and 777 flats (completed).

5.18 The Thurston Road site in close proximity to Lewisham Station provides a mixed use building comprising retail, live/work units, residential accommodation and car parking. The development comprises:

- non-food retail space (Use Class A1) (up to a total of 6,771 sq.m);
- flexible retail/commercial/live/work units (Use Class A1/A2/B1) up to 9 Units totalling 839 sq.m); and
- 406 dwellings comprising 108 one-bedroom, 256 two-bedroom and 42 three-bedroom self-contained flats/maisonettes.

5.19 There are 235 car parking spaces, comprising 117 retail spaces and 118 residential spaces on ground and upper ground floor levels. The ground floor comprises three retail units fronting on to Loampit Vale and Jerrard Street. Asda has occupied a unit of around 2,000 sq.m gross (1,500 sq.m net), Screwfix and The Gym Group are also tenants. As part of a later phase will provide 872 sq.m at ground floor for 4 units where the use of is flexible for further retail floorspace, commercial (A2/B1/B2) use and/or live/work units.

5.20 The S106 includes the requirement of a Commercial Units Plan to cover management and marketing of the commercial units, including any details of subsidized rents to support the economic viability of the units if proposed.

5.21 Muse's Lewisham Gateway development includes around 900 new homes, 15,000 sq.m of new retail, restaurants, hotel and leisure space a new urban park with enhanced waterways. Construction of the first phase, comprising 193 apartments in two blocks of 25 and 15 storeys with ground floor retail space (600 sq.m), is nearing completion. Construction of the next phase, two landmark buildings of 15 and 22 storeys buildings providing 169 new homes with ground floor retail and restaurants is under way.

Key Messages from Case Studies and Workshop

5.22 High density mixed use developments with retail, leisure and commercial at lower levels are now commonplace within inner London with multi-storey residential or office blocks above, particularly at major transport hubs, where they benefit from high levels of accessibility. This is consistent with the high street vertical mix building typologies set out in the draft OKR AAP.

5.23 Feedback for the stakeholder workshop was also supportive of higher density mixed development at OKR. Retail uses were considered to be viable on ground and first/mezzanine floors within high density mixed use developments. Higher density development was also expected to retain some customer car parking, in particular food supermarkets.

5.24 The case studies show a broad mix of uses has emerged including offices, new homes, shops, hotels, leisure/community facilities, creating new centres. Retail uses are generally at ground and first floor level with residential or office uses above, consistent with the stakeholder feedback. Stakeholders suggested that the mix of uses should not be over-complicated i.e. too many different uses within each block/area, because this would create design issues, such as servicing cores. Stakeholders were supportive of introducing a wider mix of uses , such as food and beverage, leisure and entertainment to broaden the appeal of the OKR.

- 5.25 Typically mixed uses are provided within individual blocks separated from each other in a traditional street pattern, set within areas of public realm and open spaces (squares and streets). Stakeholder feedback endorsed the need to provide high quality public realm to create an attractive and pleasant shopping experience. This is particularly important if restaurant and leisure uses are to be introduced. These public areas should be set back and shielded from heavy traffic along the OKR.
- 5.26 The case studies indicate that retail uses are not provided within covered shopping centres or retail park type developments. Stakeholders accepted that the development on OKR would not provide these traditional shopping formats, but suggested it would be helpful if the emerging OKR AAP could provide more detail on the form of retail development envisaged and clearly set out an innovative vision for the area.
- 5.27 The case study developments often include a main focus for new retail development, but with smaller local facilities disperse within other parts of the wider development area. The workshop identified the need to provide local facilities to serve residents and workers, but a critical mass of facilities would need to be provided within clusters to attract customers from a wider catchment area. Proposed new Bakerloo Line extension underground stations on the OKR are the logical location for these clusters.
- 5.28 The case studies have a reduced level of customer car parking, usually basement or under-croft parking rather than surface level. The potential loss of customer car parking was key concern amongst stakeholders, although it was accepted that development would not retain large areas of surface car parking as currently found at OKR.
- 5.29 Retail units within the case study developments tend to provide medium to large units (over 200 sq.m gross). Small convenience stores (below the Sunday trading threshold 280 sq.m) often occupy premises. However larger food stores have been provided (1,500 to 2,000 sq.m net). The replacement Sainsbury's at Vauxhall Nine Elms is an example of a very large food superstore (13,000 sq.m gross) within a high density development, which suggests food store operators will consider a broad range of store sizes depending on local circumstances.
- 5.30 Stakeholders were concerned that redevelopment at OKR should not be too focused on the provision of small retail units. OKR would need to retain large format stores in order to continue to attract customers to the area. A flexible approach to unit sizes was advocated.
- 5.31 In planning terms the permitted mix of retail, food and beverage floorspace within the case study developments is generally flexible, although the maximum quantum for each type of use is often controlled via planning conditions, to ensure an appropriate mix of uses to meet the needs of the local area and to control the impact on nearby town centres.
- 5.32 The size of units is not always controlled within the planning permission, particularly at the outline application stage, nor is the availability of small affordable accommodation for independent outlets. In some cases a legal agreement has been used to control the letting/marketing strategy. Controlling the mix and size of uses is often imposed at the reserved matters stage, when the form of development becomes clearer.
- 5.33 Workshop stakeholders also advocated a flexible approach, due to the uncertainties in predicting market requirements over the next 10 to 20 years. Stakeholders indicated that achieving the OKR AAP objectives is a long term strategy. The AAP should provide more guidance on possible phasing. It should also provide more information on what form of development and improvements can be delivered in the short term (up to 5 years).

6.0

Conclusions

Meeting Customer's Needs in Southwark

6.1

The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development and main town centre uses over the plan period.

6.2

The updated quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Southwark Borough, over and above commitments. The Borough wide floorspace projections are summarised in Tables 6.1. These floorspace projections do not take into account any reduction in existing retail space at OKR or other sites following redevelopment, therefore the figure relate to the potential for a net increase in retail floorspace.

Table 6.1 Retail and Food/Beverage Floorspace Projections (Sq.M Gross)

Centre	Up to 2021	2021 to 2026	2026 to 2031	Total Up to 2031
Convenience goods	0	0	2,791	2,791
Comparison goods	3,364	20,883	20,919	45,166
Food & beverage	1,836	8,885	6,324	17,045
Total	5,200	29,768	30,034	65,002

(1) over and above commitments.

6.3

The previous floorspace projection within the 2015 study was lower at 50,801 sq.m gross at 2031, compared with the revised figure of 65,002 sq.m. This is due to higher population growth.

6.4

The revised floorspace projections do not take into account the potential development at Canada Water and the Aylesham Centre in Peckham. If these development proposals are permitted and implemented between 2021 and 2026 then the revised floorspace are summarised in Tables 6.2.

Table 6.2 Retail and Food/Beverage Floorspace Projections (Sq.M Gross)

Centre	Up to 2021	2021 to 2026	2026 to 2031	Total Up to 2031
Convenience goods	0	0	2,791	2,791
Comparison goods	3,364	0	18,375	21,739
Food & beverage	1,836	0	6,579	8,415
Total	5,200	0	27,745	32,945

(1) over and above commitments and proposals.

6.5

These floorspace projections suggest commitments and proposals are likely to absorb retail growth up 2026, but longer term growth could support further development between 2026 and 2031.

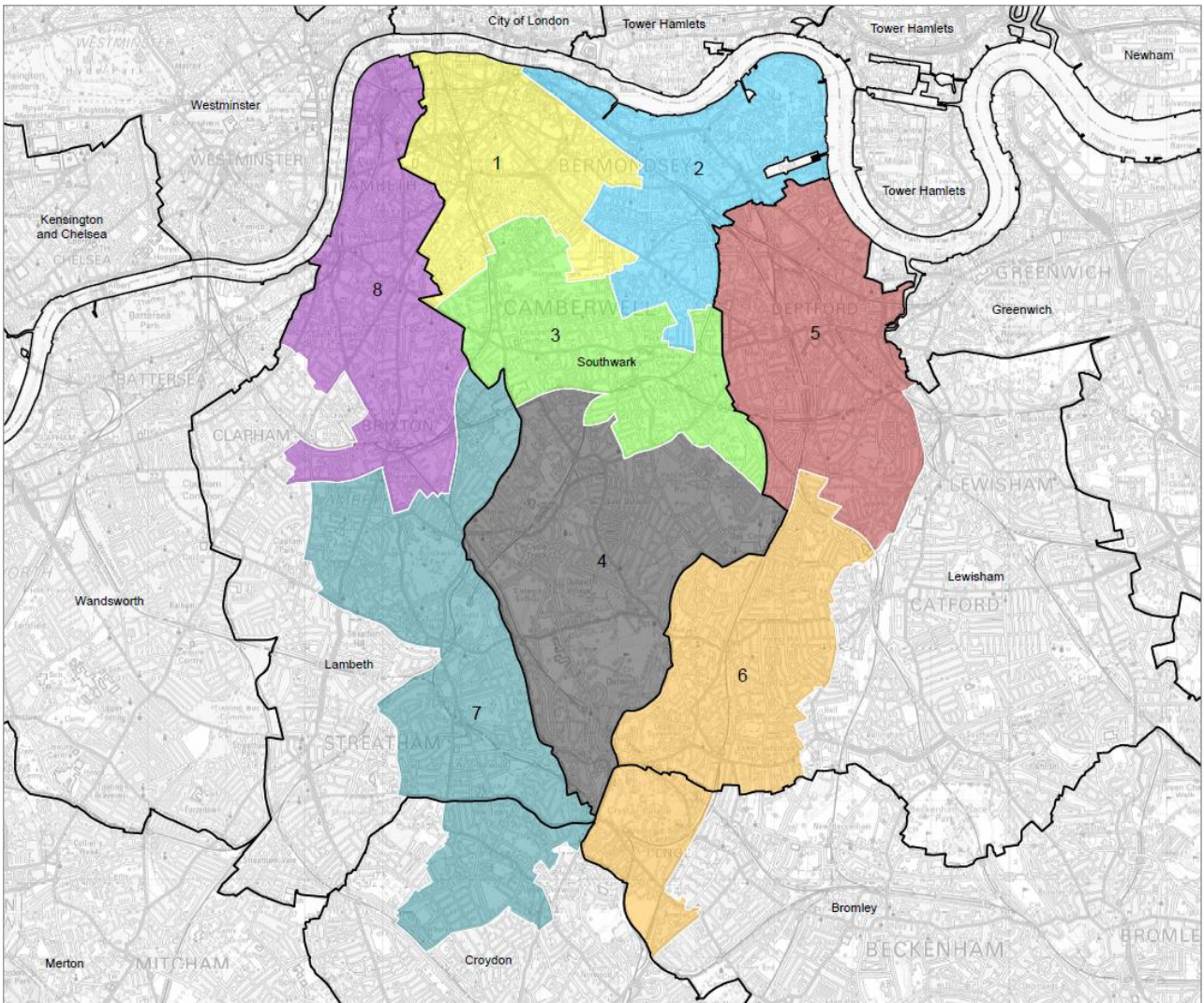
Old Kent Road

6.6

As indicated above, the floorspace projections assume no reduction in retail or food/beverage floorspace at OKR. New development at OKR could as a minimum seek to replace any retail floorspace demolished. This replacement of existing floorspace would have a minimal impact on town surrounding centres because the demolition of existing space will release retail expenditure capacity. However the diversification of retail provision at OKR could also have an impact on other town centres. The impact of any increase in retail floorspace or diversification at OKR will need to be considered. The capacity projections in Table 6.2 suggest a reasonably significant net increase in floorspace can be provided at OKR after 2026 without undermining the vitality and viability of designated town centres.

- 6.7 At present there is 64,500 sq.m gross of Class A1 to A5 floorspace at OKR. The floorspace projections (over and above commitments and proposals) suggest this provision could be increased to over 90,000 sq.m gross by 2031.
- 6.8 The draft OKR AAP seeks to retain much of the existing retail frontage and redevelop lower density areas to create new hubs aligned with potential new Bakerloo Line stations. These AAP proposals are consistent with the current importance of OKR as a convenience and a comparison goods shopping destination and the retail capacity projections outlined in this report.
- 6.9 The analysis in this report demonstrates the OKR already compares favourably in terms of retail trade draw, scale of retail provision and catchment area when compared with Major Centres in South East London e.g. Peckham, Lewisham and Catford, and other centres the London Plan identifies as having potential to become Major Centres i.e. Walworth and Canada Water.
- 6.10 The creation of hubs around proposed stations and higher density development with a broader mix of town centre uses will help to elevate OKR to a Major Centre status in the London hierarchy of centres, alongside Peckham, Lewisham, Catford and Brixton. Redevelopment will need to be high density providing a new focal point and critical mass of facilities, rather than the fragmented nature of commercial uses currently spread along the OKR.
- 6.11 A mix of uses retail, leisure and cultural should be provided, including a mix of units sizes. Replacement small shop premises (between 50 to 100 sq.m gross) will be required to accommodate displaced existing businesses. These would need to be affordable with rents between £200 to £250 per sq.m. Medium to large premises will be required to accommodate multiple outlets, including food supermarkets (over 1,500 sq.m gross) suitable for main bulk food shopping and smaller convenience stores (about 300 to 500 sq.m gross) for top-up grocery shopping.
- 6.12 The indicative mix of Class A1 to A5 uses at OKR, including retained floorspace, could be as follows:
- | | |
|-------------------------------------|----------------------------|
| • Class A1 convenience goods retail | = 15,000 sq.m gross |
| • Class A1 comparison goods retail | = 50,000 sq.m gross |
| • Class A1 service/A2 | = 10,000 sq.m gross |
| • Class A3 to A5 food & beverage | = 15,000 sq.m gross |
| Total | = 90,000 sq.m gross |
- 6.13 In addition to the replacement of existing retail uses, e.g. food supermarkets and bulky goods stores in the OKR, new premises should also be provided to establish linear high street frontages. The types of retail provision could be expanded and there is an opportunity for new sectors that are currently poorly presented, e.g. fashion and food and beverage. This potential expansion is supported by the longer term floorspace projections, particularly 2026-2031. The more diverse range of high street shopping could be clustered as suggested in and around new transport hubs and smaller shops and services can be provided in secondary frontages off the OKR.

Appendix 1: Study Area and Commitments



Key

Local Authority Boundary
Zone 1: Southwark North West
Zone 2: Southwark North East
Zone 3: Southwark Central
Zone 4: Southwark South
Zone 5: Lewisham North West
Zone 6: Lewisham South West
Zone 7: Lambeth South East
Zone 8: Lambeth North East

Table 1: Class A1 Retail Completions/Commitments - Zone 1

Address	Floorspace Change SQ.M Gross
100-42 Union Street	69
Prices Street	61
Former Elephant & Castle Swimming Pool	609
169-173 Blackfriars Road	301
231 - 241 Blackfriars Road	114
Site To The South Of Evans Granary, 38 Stoney Street	186
Kings Reach Tower Stamford Street	2,701
Sea Containers House, 20 Upper Ground	776
51- 53 Tower Bridge Road	-83
430-432 Old Kent Road	139
434 - 452 Old Kent Road	283
148 Old Kent Road	242
Elephant Road, Walworth Road/The Haygate Estate	238
New London Bridge House, 25 London Bridge Street	325
Bermondsey Spa Site C5 Grange Walk	265
Century House, 82-84 Tanner Street	1,470
4-10 & 7-9 Lamb Walk	873
124 Bermondsey Street	-238
Valentine & Orson Ph, 171 Long Lane	0
Bermondsey Spa Site G, 82-118 Spa Road	556
292 Walworth Road	330
2 -10 Steedman Street	106
204 Manor Place	269
London Park Hotel, 80 Newington Butts	280
153-157 Tower Bridge Road	-256
Castle Industrial Estate	2,232
80-94 Newington Causeway	287
London Bridge Station, 64-84 Tooley Street	100
Brandon House, 180 Borough High Street	1,460
Empire Warehouse, 1 Bear Gardens	407
130-138 Newinton Butts	147
The Heygate Estate	1,632
1-16 Blackfriars Road	700
90-91 & 92 Blackfriars Road	633
Sampson House & Ludgate House, 64 & 245 Hopton Street	750
217 Tabbard Street	110
182-202 Walworth Road	72
127-143 Borough High Street	247
49 Tower Bridge Road	65
Fielden House, 28-42 London Bridge St	160
128-150 Blackfriars Road	407
88 Borough High Street	308
2-16 Amelia Street	305
1c Braganza Street	-100
Plot H2 Heygate Street	406
Plot H3, Bounded By Heygate Street	477
185 Park Street	818
Capital House, 40-46 Weston Street	182
7a And Arches 10 & 11 Stoney Street	-125
Stax Building, 148 Old Kent Road	-122
67-71 Tanner Street	253
Manor Place Depot Site, 17-21 & 33 Manor Place	155
Rich Industrial Estate Crimscott Street	-2,507
Plot H12 Heygate Street	364
Former Lesoco Campus Ufford Street	852
Vinopolis, Bank End (70% A1)	1,957
153-159 Borough High Street	-80
301-303 Borough High Street	-168
116 Tower Bridge Road	-205
4 Blackfriars Road	-195
Friars Bridge Court, 41-45	986
204 Manor Place	167
222-224 Borough High Street	309
10-18 Union Street	30
Southwark Fire Station, Southwark Bridge Road	134
87 Newington Causeway	176
Elephant and Castle Shopping Centre (subject to planning)	10,000
18 Blackfriars Road	1,800
161- 179 Manor Place	85
Zone 1 Total	35,287

Table 2: Class A1 Retail Completions/Commitments - Zone 2

Address	Floorspace Change SQ.M Gross
139 Queens Road	111
116-120 Tooley Street	150
Land Adjacent Bridgemasters House Tower Bridge Road	369
Site F,S And U (Phase 3 And 4) Bermondsey Spa	1,452
Site A, Canada Water Surrey Quays Road	319
Estate Office Avondale Square	108
Lambeth College & Potters Fields, 1 Tower Bridge Road	305
Tower Bridge Business Complex Clements Road	200
272 St James's Road	127
Wood Dene Queens Road	450
91-93 Queens Road	200
Former Mulberry Business Park Canada Street	228
Quebec Way Industrial Estate Quebec Way	411
Decathlon Surrey Quays Road	5037
39-47 Brunel Road	-182
Chambers Wharf Chambers Street	137
346 Rotherhithe Street	345
346 Rotherhithe Street	369
24-28 Quebec Way	500
Commercial Pier Wharf Odessa Street	197
282-286 Old Kent Road	80
Rotherhithe Civic Centre	300
196 Southwark Park Road	378
163 -167 Grange Road	-100
233-247 Old Kent Road	214
4-10 Bombay Street	416
634-636 Old Kent Road	172
Zone 2 - Total	12,293

Table 3: Class A1 Retail Completions/Commitments - Zone 3 and 4

Address	Floorspace Change SQ.M Gross
Zone 3	
37-41 Peckham Road	126
133 Sumner Road	152
1 and 3 Oglander Road	-209
99-101 Rye Lane	-100
1-51 Peckham High Road	247
1-6 And 307-311 Camberwell New Green	-321
145-149 Brayards Road	-200
272-274 Camberwell Road	170
29 Peckham High Street	350
Bethwin Road Adventure Playground	137
237-247 And Car Wash Rye Lane	256
16a And 166-176a Wyndham Road	-94
315-317 Camberwell New Road	387
1-3 Peckham High Street	-45
240 and 252 Camberwell Road	228
87-95 Rye Lane	-1252
Aylesbury Estate Albany Road	1025
128 Rye Lane	340
199-201 Rye Lane	-260
203-205 Rye Lane	-150
285 Walworth Rd	134
3 Boundary Lane	-150
283 Walworth Rd	123
74-82 Rye Lane Peckham Rye Station	-346
213 Rye Lane	-1018
1-6 Dalwood Street	-122
133 Copeland Road,	329
Within Land Bounded by Thurlow Street	225
40 Queens Row	-490
79 Camberwell Road	-101
Zone 3 -Total	-629
Zone 4	
Lordship Lane	-200
Hindman Road	-100
24 Forest Hill Road	100
18-22 Grove Vale	293
84-90 Lordship Lane	319
Zone 4 - Total	412

Table 4: Class A3-A5 Food & Beverage Completions and Commitments - Zone 1

Address	Floorspace Change SQ.M Gross
100-142 Union Street	69
New London Bridge House	975
Land Bounded By Prices Street	60
Bermondsey Spa Site G, 82-118 Spa Road	-455
218-220 Borough High Street	166
Hand In Hand	-298
231 - 241 Blackfriars Road	230
124 Bermondsey Street	238
Kings Reach Tower Stamford Street	1,000
Sea Containers House, 20 Upper Ground	400
60 Park Street	-434
Claremont Arms	-300
35 St Georges Road	45
Former Elephant & Castle Swimming Pool	200
Valentine & Orson	-303
Duke Of Sutherland	-111
186-192 Old Kent Road	64
169-173 Blackfriars Road	-665
Land Bounded by Elephant Rd, Walworth Rd, The Haygate Estate	982
70 East Walworth	-296
Hermitage House	-281
9 Bermondsey Square	-430
10-18 Union Street	24
Southwark Fire Station, Southwark Bridge Road	100
Elephant and Castle Shopping Centre (subject to planning)	3,594
18 Blackfriars Road	1,520
161- 179 Manor Place	285
Site of London Park Hotel, 80Newington Butts	176
153-157 Tower Bridge Road	213
Castle Industrial Estate	924
London Bridge Station, 64-84 Tooley Street	100
The Heygate Estate	3350
1-16 Blackfriars Road	616
Sampson House & Ludgate House, 64 & 245 Hopton Street	750
182-202 Walworth Road	12
226 Newington	-580
127-143 Borough High Street	192
5-9 Rockingham Street	65
Fielden House, 28-42	265
St Thomas Church, 9a St Thomas St	868
128-150 Blackfriars Road	407
Railway Arches 22-26 Great Suffolk Street	300
The Hop Exchange, 24 Southwark Street	728
Plot H2 Heygate Street	406
Plot H3, Bounded By Heygate Street	477
Railway Arches South Of Southwark Street,	580
Railway Arches South Of Southwark Street,	646
New Hibernia House Winchester Walk	140
Wedge House, 32-40	-375
2 London Bridge	130
7a And Arches 10 & 11 Stoney Street	160
Manor Place Depot Site, 17-21 & 33 Manor Place	155
Soho Wharf Clink Street	0
Rich Industrial Estate Crimscott Street	162
Vinopolis 1 Bank End (30% F&B)	839
Boland House And Counting House St Thomas Street	-361
The Fort, 131	-448
55-57 Tower Bridge Road	191
153-159 Borough High Street	316
West Combe Apartments	33
The Royal Standard	-1562
Zone 1 - Sub-Total	16,254

Table 5: Class A3-A5 Food & Beverage Completions and Commitments - Zone 2

Address	Floorspace Change SQ.M Gross
Site A, Canada Water	319
Free Trader P.H.	-550
139 Asylum Road	-191
Glengall Tavern	-160
Bramcote Arms	-260
Adjacent Lambeth College & Potters Fields	304
39-47 Brunel Road	270
Tavern Quay Commercial Centre Rope Street	195
Quebec Way Industrial Estate	123
Tower Bridge Business Complex	300
440 Rotherhithe	-324
Decathlon Surrey Quays Road	1088
Former Mulberry Business Park Canada Street	228
146 Riverside	-160
132 Tanner St	-100
346 Rotherhithe Street	-300
Tower Bridge Magistrates Court And Police Station	630
The Boatman Public House, 234	-310
1 Livesey	-243
112-114 Tooley Street	319
Ship York, Surrey Docks	-325
346 Rotherhithe Street	-228
282-286 Old Kent Road	0
Rotherhithe Civic Centre	126
163 -167 Grange Road	-53
634-636 Old Kent Road	100
Zone 2 - Sub-Total	798

Table 6: Class A3-A5 Food & Beverage Completions and Commitments - Zone 3 and 4

Address	Floorspace Change SQ.M Gross
Zone 3	
7-9 Westmoreland Road	-201
Marlborough Public House, 67-69	-173
Peckham	-238
Land R/O 45-51 Peckham	244
133	-130
193 Rye Lane	691
74-82 Rye Lane	-346
Peckham Centre Multi Storey Car Park	1,521
109 Peckham High Street	-149
Zone 3 - Sub-Total	1,219
Zone 4	
377 Lordship Lane	-174
44 Wanley Road	-377
28 Hoppers	-196
Zone 4 - Sub-Total	-573

Appendix 2: Convenience Capacity

Table 1: Study Area Population Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	71,317	74,431	81,088	95,696	103,256	105,289
Zone 2 - Southwark North East	69,747	73,464	78,293	87,346	104,116	119,539
Zone 3 - Southwark Central	85,282	88,937	93,028	98,506	100,124	99,785
Zone 4 - Southwark South	63,002	66,349	68,914	69,530	68,600	67,160
Zone 5 - Lewisham North West	80,858	85,500	91,308	98,186	105,486	112,120
Zone 6 - Lewisham South West	73,736	76,873	78,311	79,349	80,768	82,238
Zone 7 - Lambeth South East	105,477	109,081	111,018	113,496	116,595	122,196
Zone 8 - Lambeth North East	100,307	105,294	110,605	117,791	124,445	132,167
Total	649,726	679,929	712,565	759,900	803,390	840,494

Source:

Southwark Borough Preferred Option - Interim 2015-based BPO Projection (GLA 2017)

GLA 2015 - Based Demographic Projections (ward projections published February 2017) for zones 5 to 8

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	1,861	1,822	1,793	1,785	1,786
Zone 2 - Southwark North East	1,812	1,774	1,745	1,738	1,739
Zone 3 - Southwark Central	1,550	1,518	1,493	1,487	1,488
Zone 4 - Southwark South	2,136	2,091	2,057	2,048	2,050
Zone 5 - Lewisham North West	1,924	1,884	1,853	1,845	1,847
Zone 6 - Lewisham South West	1,968	1,926	1,895	1,887	1,889
Zone 7 - Lambeth South East	1,991	1,950	1,918	1,910	1,911
Zone 8 - Lambeth North East	2,012	1,970	1,938	1,930	1,931

Sources:

Experian Local Expenditure 2015 (2015 prices)

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

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	138.52	147.74	171.54	184.29	188.07
Zone 2 - Southwark North East	133.12	138.87	152.42	180.90	207.87
Zone 3 - Southwark Central	137.85	141.19	147.08	148.86	148.47
Zone 4 - Southwark South	141.72	144.07	143.01	140.49	137.65
Zone 5 - Lewisham North West	164.50	172.01	181.98	194.66	207.07
Zone 6 - Lewisham South West	151.29	150.85	150.38	152.41	155.31
Zone 7 - Lambeth South East	217.18	216.43	217.69	222.67	233.55
Zone 8 - Lambeth North East	211.85	217.87	228.27	240.13	255.24
Total	1,296.03	1,329.03	1,392.37	1,464.42	1,533.22

Source: Tables 1 and 2

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

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Tesco Metro, Elephant & Castle	10.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.9%	15.0%
Morrisons, Waiworth Road	18.1%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	1.6%	15.0%
Other Main Food Stores in Zone 1	9.6%	0.2%	3.4%	0.0%	0.3%	0.2%	0.3%	2.3%	15.0%
Other Local Shops Zone 1	13.1%	4.5%	3.6%	0.7%	0.0%	0.2%	0.0%	1.4%	5.0%
Zone 1 Sub-Total	50.9%	4.7%	12.5%	0.7%	0.3%	0.4%	0.3%	6.2%	
Zone 2 - Southwark North East									
Tesco, Redriffe Road, Surrey Quays	1.9%	26.4%	1.2%	0.5%	5.4%	0.1%	0.0%	0.6%	15.0%
Asda, Old Kent Road	5.2%	11.3%	13.1%	10.2%	8.4%	2.3%	0.0%	4.8%	10.0%
Tesco, Dunton Road/Old Kent Road	11.0%	5.0%	5.3%	0.3%	4.0%	0.2%	0.2%	0.9%	10.0%
Other Main Food Stores in Zone 2	3.5%	19.3%	5.7%	0.6%	5.7%	0.1%	0.2%	1.3%	5.0%
Other Local Shops Zone 2	11.1%	7.4%	0.0%	0.0%	1.8%	0.2%	0.8%	0.8%	5.0%
Zone 2 Sub-Total	32.7%	69.4%	25.3%	11.6%	25.3%	2.9%	1.2%	8.4%	
Zone 3 - Southwark Central									
Asda, Rye Lane, Peckham	0.0%	1.2%	5.5%	1.1%	0.0%	0.0%	0.0%	0.2%	5.0%
Morrisons, Rye Lane, Peckham	0.2%	3.3%	14.3%	11.5%	0.6%	0.5%	2.0%	0.3%	5.0%
Morrisons, Denmark Hill	2.6%	0.0%	4.3%	0.5%	0.0%	0.0%	1.2%	2.1%	5.0%
Other Main Food Stores in Zone 3	0.0%	2.9%	11.9%	1.6%	0.0%	0.9%	0.3%	0.6%	5.0%
Other Local Shops Zone 3	1.4%	3.7%	7.1%	0.1%	2.7%	4.1%	0.3%	4.7%	5.0%
Zone 3 Sub-Total	4.2%	11.1%	43.1%	14.8%	3.3%	5.5%	3.8%	7.9%	
Zone 4 - Southwark South									
Sainsbury's, Dog Kennel Hill	0.4%	0.1%	7.4%	26.0%	3.0%	0.3%	3.4%	3.1%	5.0%
Other Main Food Stores in Zone 4	0.3%	0.0%	1.0%	16.0%	4.6%	0.0%	1.5%	0.0%	5.0%
Other Local Shops Zone 4	0.0%	0.1%	0.4%	11.2%	0.2%	0.1%	3.6%	0.8%	5.0%
Zone 4 Sub-Total	0.7%	0.2%	8.8%	53.2%	7.8%	0.4%	8.5%	3.9%	
LB Southwark Total	88.5%	85.4%	89.7%	80.3%	36.7%	9.2%	13.8%	26.4%	
Stores in LB Lambeth	7.4%	0.0%	2.7%	3.9%	3.0%	0.3%	51.2%	54.1%	60.0%
Stores in LB Lewisham	0.2%	4.3%	1.7%	12.2%	50.3%	66.8%	15.9%	0.0%	50.0%
Stores in LB Croydon	0.0%	0.0%	0.6%	0.0%	0.2%	0.4%	5.0%	1.0%	90.0%
Stores in LB Bromley	0.2%	0.0%	0.1%	2.1%	0.9%	17.8%	3.1%	0.2%	90.0%
Stores in RB Greenwich	0.7%	1.7%	0.0%	0.0%	5.3%	0.5%	0.2%	0.0%	95.0%
Other Outside	3.0%	8.6%	5.2%	1.5%	3.6%	5.0%	10.8%	18.3%	90.0%
Total Outside LB Southwark	11.5%	14.6%	10.3%	19.7%	63.3%	90.8%	86.2%	73.6%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	138.52	133.12	137.85	141.72	164.50	151.29	217.18	211.85		1,296.03
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	13.99	0.00	1.10	0.00	0.00	0.00	0.00	1.91	3.00	20.00
Morrisons, Walworth Road	25.07	0.00	6.48	0.00	0.00	0.00	0.00	3.39	6.17	41.11
Other Main Food Stores in Zone 1	13.30	0.27	4.69	0.00	0.49	0.30	0.65	4.87	4.34	28.91
Other Local Shops Zone 1	18.15	5.99	4.96	0.99	0.00	0.30	0.00	2.97	1.76	35.11
Zone 1 Sub-Total	70.50	6.26	17.23	0.99	0.49	0.61	0.65	13.13	15.26	125.13
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	2.63	35.14	1.65	0.71	8.88	0.15	0.00	1.27	8.90	59.34
Asda, Old Kent Road	7.20	15.04	18.06	14.46	13.82	3.48	0.00	10.17	9.14	91.36
Tesco, Dunton Road/Old Kent Road	15.24	6.66	7.31	0.43	6.58	0.30	0.43	1.91	4.32	43.16
Other Main Food Stores in Zone 2	4.85	25.69	7.86	0.85	9.38	0.15	0.43	2.75	2.73	54.70
Other Local Shops Zone 2	15.38	9.85	0.00	0.00	2.96	0.30	1.74	1.69	1.68	33.60
Zone 2 Sub-Total	45.29	92.38	34.88	16.44	41.62	4.39	2.61	17.80	26.77	282.17
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.60	7.58	1.56	0.00	0.00	0.00	0.42	0.59	11.75
Morrisons, Rye Lane, Peckham	0.28	4.39	19.71	16.30	0.99	0.76	4.34	0.64	2.49	49.90
Morrisons, Denmark Hill	3.60	0.00	5.93	0.71	0.00	0.00	2.61	4.45	0.91	18.20
Other Main Food Stores in Zone 3	0.00	3.86	16.40	2.27	0.00	1.36	0.65	1.27	1.36	27.18
Other Local Shops Zone 3	1.94	4.93	9.79	0.14	4.44	6.20	0.65	9.96	2.00	40.05
Zone 3 Sub-Total	5.82	14.78	59.41	20.97	5.43	8.32	8.25	16.74	7.35	147.07
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.55	0.13	10.20	36.85	4.94	0.45	7.38	6.57	3.53	70.61
Other Main Food Stores in Zone 4	0.42	0.00	1.38	22.68	7.57	0.00	3.26	0.00	1.86	37.15
Other Local Shops Zone 4	0.00	0.13	0.55	15.87	0.33	0.15	7.82	1.69	1.40	27.95
Zone 4 Sub-Total	0.97	0.27	12.13	75.40	12.83	0.61	18.46	8.26	6.79	135.71
LB Southwark Total	122.59	113.68	123.65	113.80	60.37	13.92	29.97	55.93	56.17	690.08
Stores in LB Lambeth	10.25	0.00	3.72	5.53	4.94	0.45	111.20	114.61	376.04	626.74
Stores in LB Lewisham	0.28	5.72	2.34	17.29	82.74	101.06	34.53	0.00	243.97	487.94
Stores in LB Croydon	0.00	0.00	0.83	0.00	0.33	0.61	10.86	2.12	132.65	147.39
Stores in LB Bromley	0.28	0.00	0.14	2.98	1.48	26.93	6.73	0.42	350.61	389.57
Stores in RB Greenwich	0.97	2.26	0.00	0.00	8.72	0.76	0.43	0.00	249.70	262.84
Other Outside	4.16	11.45	7.17	2.13	5.92	7.56	23.46	38.77	905.48	1,006.08
Total Outside LB Southwark	15.93	19.44	14.20	27.92	104.13	137.37	187.21	155.92	2,258.45	2,920.56
TOTAL	138.52	133.12	137.85	141.72	164.50	151.29	217.18	211.85	2,314.61	3,610.64

Source: Table 3 and 4

Table 6: Future 2021 Convenience Goods Expenditure (£m) - No Commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	171.54	152.42	147.08	143.01	181.98	150.38	217.69	228.27		1,392.37
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	17.33	0.00	1.18	0.00	0.00	0.00	0.00	2.05	3.63	24.18
Morrisons, Walworth Road	31.05	0.00	6.91	0.00	0.00	0.00	0.00	3.65	7.34	48.96
Other Main Food Stores in Zone 1	16.47	0.30	5.00	0.00	0.55	0.30	0.65	5.25	5.03	33.56
Other Local Shops Zone 1	22.47	6.86	5.30	1.00	0.00	0.30	0.00	3.20	2.06	41.18
Zone 1 Sub-Total	87.31	7.16	18.39	1.00	0.55	0.60	0.65	14.15	18.06	147.88
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	3.26	40.24	1.77	0.72	9.83	0.15	0.00	1.37	10.12	67.44
Asda, Old Kent Road	8.92	17.22	19.27	14.59	15.29	3.46	0.00	10.96	9.97	99.67
Tesco, Dunton Road/Old Kent Road	18.87	7.62	7.80	0.43	7.28	0.30	0.44	2.05	4.98	49.76
Other Main Food Stores in Zone 2	6.00	29.42	8.38	0.86	10.37	0.15	0.44	2.97	3.08	61.67
Other Local Shops Zone 2	19.04	11.28	0.00	0.00	3.28	0.30	1.74	1.83	1.97	39.44
Zone 2 Sub-Total	56.09	105.78	37.21	16.59	46.04	4.36	2.61	19.18	30.11	317.98
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.83	8.09	1.57	0.00	0.00	0.00	0.46	0.63	12.58
Morrisons, Rye Lane, Peckham	0.34	5.03	21.03	16.45	1.09	0.75	4.35	0.68	2.62	52.35
Morrisons, Denmark Hill	4.46	0.00	6.32	0.72	0.00	0.00	2.61	4.79	1.00	19.90
Other Main Food Stores in Zone 3	0.00	4.42	17.50	2.29	0.00	1.35	0.65	1.37	1.45	29.04
Other Local Shops Zone 3	2.40	5.64	10.44	0.14	4.91	6.17	0.65	10.73	2.16	43.25
Zone 3 Sub-Total	7.20	16.92	63.39	21.17	6.01	8.27	8.27	18.03	7.86	157.12
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.69	0.15	10.88	37.18	5.46	0.45	7.40	7.08	3.65	72.94
Other Main Food Stores in Zone 4	0.51	0.00	1.47	22.88	8.37	0.00	3.27	0.00	1.92	38.42
Other Local Shops Zone 4	0.00	0.15	0.59	16.02	0.36	0.15	7.84	1.83	1.42	28.35
Zone 4 Sub-Total	1.20	0.30	12.94	76.08	14.19	0.60	18.50	8.90	6.99	139.72
LB Southwark Total	151.81	130.17	131.93	114.83	66.78	13.84	30.04	60.26	63.02	762.69
Stores in LB Lambeth	12.69	0.00	3.97	5.58	5.46	0.45	111.45	123.50	394.66	657.76
Stores in LB Lewisham	0.34	6.55	2.50	17.45	91.53	100.45	34.61	0.00	253.44	506.89
Stores in LB Croydon	0.00	0.00	0.88	0.00	0.36	0.60	10.88	2.28	135.13	150.15
Stores in LB Bromley	0.34	0.00	0.15	3.00	1.64	26.77	6.75	0.46	351.93	391.04
Stores in RB Greenwich	1.20	2.59	0.00	0.00	9.64	0.75	0.44	0.00	277.85	292.48
Other Outside	5.15	13.11	7.65	2.15	6.55	7.52	23.51	41.77	966.62	1,074.02
Total Outside LB Southwark	19.73	22.25	15.15	28.17	115.19	136.55	187.64	168.01	2,379.64	3,072.34
TOTAL	171.54	152.42	147.08	143.01	181.98	150.38	217.69	228.27	2,442.66	3,835.03

Source: Table 3 and 4

Table 7: Future 2026 Convenience Goods Expenditure (£m) - No Commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	184.29	180.90	148.86	140.49	194.66	152.41	222.67	240.13		1,464.42
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	18.61	0.00	1.19	0.00	0.00	0.00	0.00	2.16	3.88	25.84
Morrisons, Walworth Road	33.36	0.00	7.00	0.00	0.00	0.00	0.00	3.84	7.80	51.99
Other Main Food Stores in Zone 1	17.69	0.36	5.06	0.00	0.58	0.30	0.67	5.52	5.33	35.52
Other Local Shops Zone 1	24.14	8.14	5.36	0.98	0.00	0.30	0.00	3.36	2.23	44.52
Zone 1 Sub-Total	93.81	8.50	18.61	0.98	0.58	0.61	0.67	14.89	19.23	157.88
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	3.50	47.76	1.79	0.70	10.51	0.15	0.00	1.44	11.62	77.47
Asda, Old Kent Road	9.58	20.44	19.50	14.33	16.35	3.51	0.00	11.53	10.58	105.82
Tesco, Dunton Road/Old Kent Road	20.27	9.05	7.89	0.42	7.79	0.30	0.45	2.16	5.37	53.70
Other Main Food Stores in Zone 2	6.45	34.91	8.48	0.84	11.10	0.15	0.45	3.12	3.45	68.96
Other Local Shops Zone 2	20.46	13.39	0.00	0.00	3.50	0.30	1.78	1.92	2.18	43.53
Zone 2 Sub-Total	60.26	125.55	37.66	16.30	49.25	4.42	2.67	20.17	33.20	349.48
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	2.17	8.19	1.55	0.00	0.00	0.00	0.48	0.65	13.04
Morrisons, Rye Lane, Peckham	0.37	5.97	21.29	16.16	1.17	0.76	4.45	0.72	2.68	53.56
Morrisons, Denmark Hill	4.79	0.00	6.40	0.70	0.00	0.00	2.67	5.04	1.03	20.64
Other Main Food Stores in Zone 3	0.00	5.25	17.71	2.25	0.00	1.37	0.67	1.44	1.51	30.20
Other Local Shops Zone 3	2.58	6.69	10.57	0.14	5.26	6.25	0.67	11.29	2.29	45.73
Zone 3 Sub-Total	7.74	20.08	64.16	20.79	6.42	8.38	8.46	18.97	8.16	163.17
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.74	0.18	11.02	36.53	5.84	0.46	7.57	7.44	3.67	73.44
Other Main Food Stores in Zone 4	0.55	0.00	1.49	22.48	8.95	0.00	3.34	0.00	1.94	38.75
Other Local Shops Zone 4	0.00	0.18	0.60	15.73	0.39	0.15	8.02	1.92	1.42	28.41
Zone 4 Sub-Total	1.29	0.36	13.10	74.74	15.18	0.61	18.93	9.37	7.03	140.61
LB Southwark Total	163.10	154.49	133.52	112.81	71.44	14.02	30.73	63.39	67.62	811.13
Stores in LB Lambeth	13.64	0.00	4.02	5.48	5.84	0.46	114.01	129.91	410.02	683.37
Stores in LB Lewisham	0.37	7.78	2.53	17.14	97.92	101.81	35.40	0.00	262.95	525.90
Stores in LB Croydon	0.00	0.00	0.89	0.00	0.39	0.61	11.13	2.40	138.84	154.27
Stores in LB Bromley	0.37	0.00	0.15	2.95	1.75	27.13	6.90	0.48	357.59	397.32
Stores in RB Greenwich	1.29	3.08	0.00	0.00	10.32	0.76	0.45	0.00	301.91	317.80
Other Outside	5.53	15.56	7.74	2.11	7.01	7.62	24.05	43.94	1,021.99	1,135.55
Total Outside LB Southwark	21.19	26.41	15.33	27.68	123.22	138.39	191.94	176.74	2,493.31	3,214.21
TOTAL	184.29	180.90	148.86	140.49	194.66	152.41	222.67	240.13	2,560.92	4,025.34

Source: Table 3 and 4

Table 8: Future 2031 Convenience Goods Expenditure (£m) - No Commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	188.07	207.87	148.47	137.65	207.07	155.31	233.55	255.24		1,533.22
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	19.00	0.00	1.19	0.00	0.00	0.00	0.00	2.30	3.97	26.45
Morrisons, Walworth Road	34.04	0.00	6.98	0.00	0.00	0.00	0.00	4.08	7.96	53.06
Other Main Food Stores in Zone 1	18.05	0.42	5.05	0.00	0.62	0.31	0.70	5.87	5.47	36.50
Other Local Shops Zone 1	24.64	9.35	5.34	0.96	0.00	0.31	0.00	3.57	2.33	46.51
Zone 1 Sub-Total	95.73	9.77	18.56	0.96	0.62	0.62	0.70	15.82	19.73	162.51
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	3.57	54.88	1.78	0.69	11.18	0.16	0.00	1.53	13.02	86.81
Asda, Old Kent Road	9.78	23.49	19.45	14.04	17.39	3.57	0.00	12.25	11.11	111.08
Tesco, Dunton Road/Old Kent Road	20.69	10.39	7.87	0.41	8.28	0.31	0.47	2.30	5.64	56.36
Other Main Food Stores in Zone 2	6.58	40.12	8.46	0.83	11.80	0.16	0.47	3.32	3.78	75.51
Other Local Shops Zone 2	20.88	15.38	0.00	0.00	3.73	0.31	1.87	2.04	2.33	46.53
Zone 2 Sub-Total	61.50	144.26	37.56	15.97	52.39	4.50	2.80	21.44	35.87	376.29
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	2.49	8.17	1.51	0.00	0.00	0.00	0.51	0.67	13.35
Morrisons, Rye Lane, Peckham	0.38	6.86	21.23	15.83	1.24	0.78	4.67	0.77	2.72	54.48
Morrisons, Denmark Hill	4.89	0.00	6.38	0.69	0.00	0.00	2.80	5.36	1.06	21.18
Other Main Food Stores in Zone 3	0.00	6.03	17.67	2.20	0.00	1.40	0.70	1.53	1.55	31.08
Other Local Shops Zone 3	2.63	7.69	10.54	0.14	5.59	6.37	0.70	12.00	2.40	48.06
Zone 3 Sub-Total	7.90	23.07	63.99	20.37	6.83	8.54	8.87	20.16	8.41	168.16
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.75	0.21	10.99	35.79	6.21	0.47	7.94	7.91	3.70	73.96
Other Main Food Stores in Zone 4	0.56	0.00	1.48	22.02	9.53	0.00	3.50	0.00	1.95	39.05
Other Local Shops Zone 4	0.00	0.21	0.59	15.42	0.41	0.16	8.41	2.04	1.43	28.67
Zone 4 Sub-Total	1.32	0.42	13.07	73.23	16.15	0.62	19.85	9.95	7.08	141.69
LB Southwark Total	166.44	177.52	133.18	110.53	75.99	14.29	32.23	67.38	71.09	848.65
Stores in LB Lambeth	13.92	0.00	4.01	5.37	6.21	0.47	119.58	138.08	431.45	719.08
Stores in LB Lewisham	0.38	8.94	2.52	16.79	104.16	103.75	37.13	0.00	273.67	547.34
Stores in LB Croydon	0.00	0.00	0.89	0.00	0.41	0.62	11.68	2.55	145.40	161.56
Stores in LB Bromley	0.38	0.00	0.15	2.89	1.86	27.65	7.24	0.51	366.07	406.74
Stores in RB Greenwich	1.32	3.53	0.00	0.00	10.97	0.78	0.47	0.00	324.30	341.37
Other Outside	5.64	17.88	7.72	2.06	7.45	7.77	25.22	46.71	1,084.10	1,204.55
Total Outside LB Southwark	21.63	30.35	15.29	27.12	131.08	141.02	201.32	187.85	2,624.99	3,380.65
TOTAL	188.07	207.87	148.47	137.65	207.07	155.31	233.55	255.24	2,696.08	4,229.30

Source: Table 3 and 4

Table 9: Convenience Goods Completions/Commitments

	Additional Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)	Convenience Goods Turnover 2017 (£M)
Zone 1 - Southwark North West (1)	14,115	9,881	118.57
Zone 2 - Southwark North East (2)	4,917	3,442	41.30
LB Southwark Total	19,032	13,322	159.87

Source: London Development Database March 2017 and LB Southwark (post March 2017)

(1) increase of 35,287 sq.m gross assumed 40% convenience goods - £12,000 psm net.

(2) increase of 12,293 sq.m gross assumed 40% convenience goods - £12,000 psm net.

Table 10: Turnover and Trade Draw of Completions at 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	60.0%	6.0%	16.0%	1.0%	0.0%	0.0%	1.0%	11.0%	5.0%	100.0%
Zone 2 - Commitments Trade Draw %	16.0%	35.0%	13.0%	5.0%	16.0%	2.0%	1.0%	7.0%	5.0%	100.0%
Zone 1 - Commitments Turnover £m	71.14	7.11	18.97	1.19	0.00	0.00	1.19	13.04	5.93	118.57
Zone 2 - Commitments Turnover £m	6.61	14.46	5.37	2.07	6.61	0.83	0.41	2.89	2.07	41.30

Source: Table 4 trade draw and Lichfield estimates. Sales floorspace of commitments at £12,000 per sq.m net

Table 11: Convenience Goods Expenditure 2021 (£m) - with completions and commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	171.54	152.42	147.08	143.01	181.98	150.38	217.69	228.27		1,392.37
Zone 1 - Southwark North West										
Commitments Zone 1	71.14	7.11	18.97	1.19	0.00	0.00	1.19	13.04	5.93	118.57
Tesco Metro, Elephant & Castle	7.77	0.00	0.89	0.00	0.00	0.00	0.00	1.69	3.58	13.93
Morrisons, Walworth Road	13.93	0.00	5.22	0.00	0.00	0.00	0.00	3.00	7.25	29.41
Other Main Food Stores in Zone 1	7.39	0.25	3.78	0.00	0.50	0.30	0.64	4.32	4.97	22.14
Other Local Shops Zone 1	13.18	5.90	4.32	0.97	0.00	0.30	0.00	2.77	2.04	29.48
Zone 1 Sub-Total	113.41	13.26	33.18	2.16	0.50	0.59	1.82	24.83	23.78	213.53
Zone 2 - Southwark North East										
Commitments Zone 2	6.61	14.46	5.37	2.07	6.61	0.83	0.41	2.89	2.07	41.30
Tesco, Redriffe Road, Surrey Quays	1.46	32.71	1.33	0.69	9.06	0.15	0.00	1.13	9.99	56.52
Asda, Old Kent Road	4.00	14.00	14.55	14.04	14.09	3.39	0.00	9.01	9.84	82.94
Tesco, Dunton Road/Old Kent Road	8.47	6.19	5.89	0.41	6.71	0.30	0.42	1.69	4.91	35.00
Other Main Food Stores in Zone 2	3.52	25.29	6.84	0.83	9.77	0.15	0.43	2.57	3.06	52.46
Other Local Shops Zone 2	11.17	9.70	0.00	0.00	3.08	0.30	1.71	1.58	1.95	29.49
Zone 2 Sub-Total	35.23	102.35	33.99	18.04	49.32	5.11	2.97	18.88	31.82	297.71
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.66	7.10	1.54	0.00	0.00	0.00	0.42	0.62	11.34
Morrisons, Rye Lane, Peckham	0.25	4.56	18.46	16.14	1.05	0.74	4.30	0.62	2.60	48.73
Morrisons, Denmark Hill	3.23	0.00	5.55	0.70	0.00	0.00	2.58	4.37	0.99	17.42
Other Main Food Stores in Zone 3	0.00	4.01	15.36	2.25	0.00	1.34	0.64	1.25	1.44	26.29
Other Local Shops Zone 3	1.74	5.11	9.16	0.14	4.72	6.11	0.64	9.78	2.15	39.56
Zone 3 Sub-Total	5.22	15.34	55.63	20.77	5.77	8.19	8.17	16.44	7.81	143.34
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.31	0.12	8.22	35.80	5.03	0.44	7.22	5.82	3.60	66.57
Other Main Food Stores in Zone 4	0.37	0.00	1.29	22.46	8.04	0.00	3.22	0.00	1.91	37.30
Other Local Shops Zone 4	0.00	0.15	0.55	15.87	0.36	0.15	7.79	1.75	1.41	28.02
Zone 4 Sub-Total	0.68	0.27	10.06	74.12	13.43	0.59	18.23	7.57	6.92	131.89
LB Southwark Total	154.53	131.21	132.86	115.10	69.03	14.48	31.20	67.71	70.33	786.45
Stores in LB Lambeth	10.94	0.00	3.73	5.53	5.35	0.45	110.77	118.02	393.44	648.23
Stores in LB Lewisham	0.30	6.25	2.35	17.28	89.75	99.98	34.40	0.00	252.67	502.97
Stores in LB Croydon	0.00	0.00	0.83	0.00	0.36	0.60	10.82	2.18	134.72	149.50
Stores in LB Bromley	0.30	0.00	0.14	2.98	1.61	26.64	6.71	0.44	350.85	389.65
Stores in RB Greenwich	1.04	2.47	0.00	0.00	9.46	0.75	0.43	0.00	277.00	291.14
Other Outside	4.44	12.49	7.18	2.13	6.42	7.48	23.36	39.92	963.65	1,067.08
Total Outside LB Southwark	17.01	21.21	14.22	27.91	112.94	135.90	186.49	160.56	2,372.33	3,048.58
TOTAL	171.54	152.42	147.08	143.01	181.98	150.38	217.69	228.27	2,442.66	3,835.03

Source: Table 6 and 10

Table 12: Convenience Goods Expenditure 2026 (£m) - with completions and commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	184.29	180.90	148.86	140.49	194.66	152.41	222.67	240.13		1,464.42
Zone 1 - Southwark North West										
Commitments Zone 1	76.43	8.44	19.20	1.16	0.00	0.00	1.21	13.72	6.24	126.40
Tesco Metro, Elephant & Castle	8.35	0.00	0.90	0.00	0.00	0.00	0.00	1.78	3.77	14.80
Morrisons, Walworth Road	14.96	0.00	5.28	0.00	0.00	0.00	0.00	3.16	7.63	31.04
Other Main Food Stores in Zone 1	7.94	0.29	3.82	0.00	0.54	0.30	0.65	4.54	5.23	23.32
Other Local Shops Zone 1	14.16	7.00	4.37	0.96	0.00	0.30	0.00	2.91	2.15	31.85
Zone 1 Sub-Total	121.84	15.74	33.58	2.12	0.54	0.60	1.86	26.12	25.01	227.40
Zone 2 - Southwark North East										
Commitments Zone 2	7.10	17.16	5.43	2.03	7.07	0.84	0.42	3.04	2.17	45.26
Tesco, Redriff Road, Surrey Quays	1.57	38.82	1.35	0.68	9.69	0.15	0.00	1.19	10.51	63.95
Asda, Old Kent Road	4.30	16.62	14.73	13.80	15.08	3.44	0.00	9.48	10.35	87.79
Tesco, Dunton Road/Old Kent Road	9.09	7.35	5.96	0.41	7.18	0.30	0.43	1.78	5.17	37.67
Other Main Food Stores in Zone 2	3.78	30.01	6.93	0.82	10.45	0.15	0.44	2.71	3.21	58.50
Other Local Shops Zone 2	12.00	11.51	0.00	0.00	3.30	0.30	1.75	1.67	2.05	32.57
Zone 2 Sub-Total	37.84	121.47	34.39	17.73	52.76	5.18	3.04	19.86	33.47	325.75
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.97	7.19	1.52	0.00	0.00	0.00	0.44	0.66	11.76
Morrisons, Rye Lane, Peckham	0.27	5.41	18.68	15.86	1.12	0.75	4.40	0.66	2.74	49.88
Morrisons, Denmark Hill	3.47	0.00	5.62	0.69	0.00	0.00	2.64	4.60	1.04	18.05
Other Main Food Stores in Zone 3	0.00	4.76	15.55	2.21	0.00	1.36	0.66	1.31	1.52	27.36
Other Local Shops Zone 3	1.87	6.07	9.28	0.14	5.05	6.19	0.66	10.29	2.26	41.80
Zone 3 Sub-Total	5.61	18.20	56.30	20.41	6.17	8.30	8.36	17.29	8.21	148.85
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.33	0.15	8.32	35.17	5.38	0.45	7.38	6.12	3.79	67.09
Other Main Food Stores in Zone 4	0.40	0.00	1.31	22.06	8.61	0.00	3.30	0.00	2.01	37.68
Other Local Shops Zone 4	0.00	0.17	0.56	15.59	0.38	0.15	7.97	1.84	1.49	28.14
Zone 4 Sub-Total	0.73	0.32	10.18	72.82	14.37	0.60	18.65	7.96	7.28	132.91
LB Southwark Total	166.02	155.73	134.46	113.07	73.84	14.68	31.91	71.23	73.97	834.92
Stores in LB Lambeth	11.76	0.00	3.77	5.43	5.73	0.46	113.30	124.15	413.80	678.40
Stores in LB Lewisham	0.32	7.41	2.38	16.98	96.01	101.33	35.19	0.00	265.74	525.35
Stores in LB Croydon	0.00	0.00	0.84	0.00	0.38	0.61	11.06	2.29	141.69	156.88
Stores in LB Bromley	0.32	0.00	0.14	2.92	1.72	27.00	6.86	0.46	369.01	408.43
Stores in RB Greenwich	1.11	2.93	0.00	0.00	10.12	0.76	0.44	0.00	291.33	306.69
Other Outside	4.77	14.83	7.27	2.09	6.87	7.58	23.90	42.00	1,013.51	1,122.82
Total Outside LB Southwark	18.27	25.18	14.39	27.42	120.82	137.73	190.75	168.90	2,495.09	3,198.56
TOTAL	184.29	180.90	148.86	140.49	194.66	152.41	222.67	240.13	2,569.06	4,033.47

Source: Table 6 and 10

Table 13: Convenience Goods Expenditure 2031 (£m) - with completions and commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	188.07	207.87	148.47	137.65	207.07	155.31	233.55	255.24		1,533.22
Zone 1 - Southwark North West										
Commitments Zone 1	78.00	9.70	19.15	1.14	0.00	0.00	1.27	14.58	6.53	130.37
Tesco Metro, Elephant & Castle	8.52	0.00	0.90	0.00	0.00	0.00	0.00	1.89	3.95	15.25
Morrisons, Walworth Road	15.27	0.00	5.27	0.00	0.00	0.00	0.00	3.36	7.99	31.89
Other Main Food Stores in Zone 1	8.10	0.34	3.81	0.00	0.57	0.30	0.68	4.83	5.47	24.12
Other Local Shops Zone 1	14.45	8.04	4.36	0.94	0.00	0.31	0.00	3.10	2.25	33.44
Zone 1 Sub-Total	124.34	18.08	33.49	2.08	0.57	0.61	1.96	27.76	26.18	235.07
Zone 2 - Southwark North East										
Commitments Zone 2	7.25	19.71	5.42	1.99	7.52	0.85	0.44	3.23	2.27	48.69
Tesco, Redriff Road, Surrey Quays	1.60	44.61	1.35	0.66	10.31	0.15	0.00	1.26	11.00	70.94
Asda, Old Kent Road	4.39	19.09	14.69	13.52	16.04	3.50	0.00	10.08	10.84	92.15
Tesco, Dunton Road/Old Kent Road	9.28	8.45	5.94	0.40	7.64	0.30	0.46	1.89	5.41	39.77
Other Main Food Stores in Zone 2	3.86	34.49	6.91	0.80	11.11	0.15	0.46	2.88	3.36	64.03
Other Local Shops Zone 2	12.24	13.22	0.00	0.00	3.51	0.31	1.83	1.77	2.15	35.04
Zone 2 Sub-Total	38.62	139.57	34.31	17.37	56.12	5.27	3.19	21.11	35.04	350.61
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	2.26	7.17	1.49	0.00	0.00	0.00	0.47	0.69	12.07
Morrisons, Rye Lane, Peckham	0.27	6.22	18.63	15.54	1.19	0.77	4.61	0.70	2.86	50.80
Morrisons, Denmark Hill	3.54	0.00	5.60	0.68	0.00	0.00	2.77	4.88	1.09	18.56
Other Main Food Stores in Zone 3	0.00	5.46	15.51	2.16	0.00	1.38	0.69	1.40	1.59	28.19
Other Local Shops Zone 3	1.91	6.97	9.25	0.14	5.37	6.31	0.69	10.93	2.37	43.94
Zone 3 Sub-Total	5.72	20.91	56.16	19.99	6.57	8.46	8.77	18.38	8.60	153.55
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.34	0.17	8.30	34.46	5.73	0.46	7.74	6.51	3.97	67.67
Other Main Food Stores in Zone 4	0.41	0.00	1.30	21.61	9.15	0.00	3.46	0.00	2.10	38.04
Other Local Shops Zone 4	0.00	0.20	0.56	15.27	0.41	0.15	8.36	1.95	1.56	28.45
Zone 4 Sub-Total	0.75	0.37	10.16	71.34	15.29	0.61	19.56	8.46	7.63	134.16
LB Southwark Total	169.43	178.94	134.11	110.78	78.55	14.96	33.47	75.71	77.45	873.40
Stores in LB Lambeth	12.00	0.00	3.76	5.32	6.09	0.46	118.84	131.96	433.24	711.68
Stores in LB Lewisham	0.32	8.52	2.37	16.64	102.13	103.25	36.91	0.00	278.23	548.36
Stores in LB Croydon	0.00	0.00	0.84	0.00	0.41	0.62	11.61	2.44	148.35	164.25
Stores in LB Bromley	0.32	0.00	0.14	2.86	1.83	27.51	7.20	0.49	386.35	426.70
Stores in RB Greenwich	1.14	3.37	0.00	0.00	10.76	0.77	0.46	0.00	305.02	321.52
Other Outside	4.86	17.04	7.25	2.05	7.31	7.73	25.07	44.64	1,061.13	1,177.08
Total Outside LB Southwark	18.65	28.93	14.36	26.86	128.52	140.35	200.08	179.53	2,612.32	3,349.59
TOTAL	188.07	207.87	148.47	137.65	207.07	155.31	233.55	255.24	2,689.77	4,222.99

Source: Table 6 and 10

Table 14: Summary of Convenience Goods Expenditure 2014 to 2031

	2014	2021	2026	2031
Available Expenditure in LB Southwark (£m)				
Zone 1 - Southwark North West	125.13	213.53	227.40	235.07
Zone 2 - Southwark North East	282.17	297.71	325.75	350.61
Zone 3 - Southwark Central	147.07	143.34	148.85	153.55
Zone 4 - Southwark South	135.71	131.89	132.91	134.16
Total	690.08	786.45	834.92	873.40
Turnover of Existing Facilities (£m)				
Zone 1 - Southwark North West	125.13	125.13	125.13	125.13
Zone 2 - Southwark North East	282.17	282.17	282.17	282.17
Zone 3 - Southwark Central	147.07	147.07	147.07	147.07
Zone 4 - Southwark South	135.71	135.71	135.71	135.71
Total	690.08	690.08	690.08	690.08
Turnover of Commitments (£m)				
Zone 1 - Southwark North West	0.00	118.57	118.57	118.57
Zone 2 - Southwark North East	0.00	41.30	41.30	41.30
Zone 3 - Southwark Central	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	0.00	0.00	0.00	0.00
Total	0.00	159.87	159.87	159.87
Surplus/Deficit Expenditure (£m)				
Zone 1 - Southwark North West	0.00	-30.17	-16.29	-8.62
Zone 2 - Southwark North East	0.00	-25.77	2.27	27.14
Zone 3 - Southwark Central	0.00	-3.74	1.78	6.48
Zone 4 - Southwark South	0.00	-3.82	-2.79	-1.55
Total	0.00	-63.49	-15.03	23.45

Source: Table 5 and 13

Table 15: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031

	2014	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Requirement (sq.m net)				
Zone 1 - Southwark North West	0	-2,514	-1,358	-719
Zone 2 - Southwark North East	0	-2,147	189	2,261
Zone 3 - Southwark Central	0	-312	148	540
Zone 4 - Southwark South	0	-318	-233	-129
Total	0	-5,291	-1,253	1,954
Floorspace Requirement (sq.m gross)				
Zone 1 - Southwark North West	0	-3,591	-1,939	-1,027
Zone 2 - Southwark North East	0	-3,067	271	3,231
Zone 3 - Southwark Central	0	-445	212	771
Zone 4 - Southwark South	0	-455	-332	-184
Total	0	-7,559	-1,790	2,791

Appendix 3: Comparison Capacity

Table 1: Study Area Population

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	71,317	74,431	81,088	95,696	103,256	105,289
Zone 2 - Southwark North East	69,747	73,464	78,293	87,346	104,116	119,539
Zone 3 - Southwark Central	85,282	88,937	93,028	98,506	100,124	99,785
Zone 4 - Southwark South	63,002	66,349	68,914	69,530	68,600	67,160
Zone 5 - Lewisham North West	80,858	85,500	91,308	98,186	105,486	112,120
Zone 6 - Lewisham South West	73,736	76,873	78,311	79,349	80,768	82,238
Zone 7 - Lambeth South East	105,477	109,081	111,018	113,496	116,595	122,196
Zone 8 - Lambeth North East	100,307	105,294	110,605	117,791	124,445	132,167
Total	649,726	679,929	712,565	759,900	803,390	840,494

Source:

Southwark Borough Preferred Option - Interim 2015-based BPO Projection (GLA 2017)

GLA 2015 - Based Demographic Projections (ward projections published February 2017) for zones 5 to 8

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	2,217	2,376	2,568	2,977	3,476
Zone 2 - Southwark North East	2,183	2,340	2,529	2,931	3,423
Zone 3 - Southwark Central	1,873	2,007	2,169	2,514	2,936
Zone 4 - Southwark South	2,899	3,108	3,358	3,893	4,546
Zone 5 - Lewisham North West	2,418	2,591	2,800	3,246	3,790
Zone 6 - Lewisham South West	2,596	2,783	3,007	3,486	4,070
Zone 7 - Lambeth South East	2,578	2,763	2,986	3,461	4,041
Zone 8 - Lambeth North East	2,470	2,647	2,861	3,316	3,872

Sources:

Experian Local Expenditure 2015 (2015 prices)

Growth Rates: 3.3% 2015-2016, 1.4% 2016-2017, 1% 2017 to 2018, 3% p.a. from 2019 to 2023 and 3.2% from 2024

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	165.01	192.70	245.75	307.36	366.00
Zone 2 - Southwark North East	160.37	183.23	220.90	305.21	409.22
Zone 3 - Southwark Central	166.58	186.72	213.66	251.72	292.96
Zone 4 - Southwark South	192.35	214.17	233.51	267.04	305.30
Zone 5 - Lewisham North West	206.74	236.61	274.94	342.39	424.99
Zone 6 - Lewisham South West	199.56	217.92	238.61	281.53	334.74
Zone 7 - Lambeth South East	281.21	306.73	338.86	403.50	493.84
Zone 8 - Lambeth North East	260.08	292.81	336.97	412.66	511.79
Total	1,631.90	1,830.91	2,103.19	2,571.42	3,138.85

Source: Tables 1 and 2

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

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Elephant & Castle / Walworth Road	16.3%	0.2%	6.6%	3.1%	0.4%	0.0%	0.3%	5.4%	15.0%
Bankside & Borough	1.3%	3.8%	0.6%	0.3%	0.1%	0.2%	0.1%	0.4%	15.0%
Zone 2 - Southwark North East									
London Bridge	0.6%	0.0%	0.4%	0.0%	0.1%	0.0%	0.0%	0.2%	50.0%
Surrey Quays/Canada Water	2.1%	18.8%	1.2%	0.2%	1.9%	0.3%	0.0%	0.7%	15.0%
The Blue	2.2%	2.5%	0.1%	0.0%	0.3%	0.0%	0.0%	0.1%	5.0%
Old Kent Road	24.0%	20.7%	29.0%	12.6%	11.5%	1.1%	1.2%	9.0%	10.0%
Zone 3 - Southwark Central									
Peckham	2.2%	6.3%	18.4%	6.7%	8.8%	3.0%	0.7%	0.3%	5.0%
Camberwell	1.5%	0.3%	1.1%	0.6%	0.0%	0.0%	0.4%	0.2%	5.0%
Nunhead	0.2%	0.1%	0.5%	0.5%	0.1%	0.0%	0.1%	0.0%	5.0%
Zone 4 - Southwark South									
Lordship Lane	0.0%	0.0%	2.7%	7.7%	0.7%	0.2%	0.7%	0.7%	5.0%
Herne Hill	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	2.8%	1.5%	5.0%
Dulwich Village	0.0%	0.0%	0.5%	6.3%	1.0%	0.2%	1.6%	0.9%	5.0%
LB Southwark Total									
	50.4%	52.7%	61.2%	38.1%	24.9%	5.0%	7.9%	19.4%	
Central London/West End	36.1%	24.3%	19.8%	19.0%	13.0%	19.5%	19.6%	42.7%	90.0%
Centres in LB Lambeth	2.4%	1.0%	1.5%	3.4%	1.2%	0.6%	23.3%	20.6%	60.0%
Centres in LB Lewisham	3.5%	3.4%	4.9%	7.9%	37.1%	27.5%	5.4%	0.6%	50.0%
Centres in LB Croydon	1.5%	0.9%	3.0%	8.5%	2.3%	10.3%	26.0%	4.6%	80.0%
Centres in LB Bromley	0.8%	0.5%	3.9%	14.2%	8.9%	22.6%	3.3%	0.5%	75.0%
Centres in RB Greenwich	0.0%	1.4%	0.7%	0.1%	3.3%	3.9%	3.5%	0.0%	85.0%
Other Outside	5.3%	15.8%	5.0%	8.8%	9.3%	10.6%	11.0%	11.6%	90.0%
Total Outside LB Southwark	49.6%	47.3%	38.8%	61.9%	75.1%	95.0%	92.1%	80.6%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2014 and NLP analysis

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	165.01	160.37	166.58	192.35	206.74	199.56	281.21	260.08		1,631.90
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	26.90	0.32	10.99	5.96	0.83	0.00	0.84	14.04	10.57	70.46
Bankside & Borough	2.15	6.09	1.00	0.58	0.21	0.40	0.28	1.04	2.07	13.82
Zone 2 - Southwark North East										
London Bridge	0.99	0.00	0.67	0.00	0.21	0.00	0.00	0.52	2.38	4.77
Surrey Quays/Canada Water	3.47	30.15	2.00	0.38	3.93	0.60	0.00	1.82	7.47	49.82
The Blue	3.63	4.01	0.17	0.00	0.62	0.00	0.00	0.26	0.46	9.14
Old Kent Road	39.60	33.20	48.31	24.24	23.77	2.20	3.37	23.41	22.01	220.11
Zone 3 - Southwark Central										
Peckham	3.63	10.10	30.65	12.89	18.19	5.99	1.97	0.78	4.43	88.63
Camberwell	2.48	0.48	1.83	1.15	0.00	0.00	1.12	0.52	0.40	7.99
Nunhead	0.33	0.16	0.83	0.96	0.21	0.00	0.28	0.00	0.15	2.92
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	4.50	14.81	1.45	0.40	1.97	1.82	1.31	26.26
Herne Hill	0.00	0.00	0.17	0.19	0.00	0.00	7.87	3.90	0.64	12.77
Dulwich Village	0.00	0.00	0.83	12.12	2.07	0.40	4.50	2.34	1.17	23.43
LB Southwark Total	83.17	84.52	101.95	73.28	51.48	9.98	22.22	50.45	53.06	530.10
Central London/West End	59.57	38.97	32.98	36.55	26.88	38.91	55.12	111.05	3,600.26	4,000.29
Centres in LB Lambeth	3.96	1.60	2.50	6.54	2.48	1.20	65.52	53.58	206.07	343.45
Centres in LB Lewisham	5.78	5.45	8.16	15.20	76.70	54.88	15.19	1.56	182.91	365.82
Centres in LB Croydon	2.48	1.44	5.00	16.35	4.75	20.55	73.11	11.96	542.61	678.27
Centres in LB Bromley	1.32	0.80	6.50	27.31	18.40	45.10	9.28	1.30	330.04	440.05
Centres in RB Greenwich	0.00	2.25	1.17	0.19	6.82	7.78	9.84	0.00	158.96	187.01
Other Outside	8.75	25.34	8.33	16.93	19.23	21.15	30.93	30.17	1,447.40	1,608.22
Total Outside LB Southwark	81.85	75.86	64.63	119.06	155.26	189.58	259.00	209.62	6,468.25	1,154.86
TOTAL	165.01	160.37	166.58	192.35	206.74	199.56	281.21	260.08	6,521.32	1,684.96

Source: Table 3 and 4

Table 6: Comparison Goods Expenditure 2021 (£m) - No Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	245.75	220.90	213.66	233.51	274.94	238.61	338.86	336.97		2,103.19
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	40.06	0.44	14.10	7.24	1.10	0.00	1.02	18.20	14.50	96.65
Bankside & Borough	3.19	8.39	1.28	0.70	0.27	0.48	0.34	1.35	2.83	18.84
Zone 2 - Southwark North East										
London Bridge	1.47	0.00	0.85	0.00	0.27	0.00	0.00	0.67	3.28	6.56
Surrey Quays/Canada Water	5.16	41.53	2.56	0.47	5.22	0.72	0.00	2.36	10.24	68.26
The Blue	5.41	5.52	0.21	0.00	0.82	0.00	0.00	0.34	0.65	12.95
Old Kent Road	58.98	45.73	61.96	29.42	31.62	2.62	4.07	30.33	29.41	294.14
Zone 3 - Southwark Central										
Peckham	5.41	13.92	39.31	15.64	24.20	7.16	2.37	1.01	5.74	114.75
Camberwell	3.69	0.66	2.35	1.40	0.00	0.00	1.36	0.67	0.53	10.66
Nunhead	0.49	0.22	1.07	1.17	0.27	0.00	0.34	0.00	0.19	3.75
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.77	17.98	1.92	0.48	2.37	2.36	1.63	32.51
Herne Hill	0.00	0.00	0.21	0.23	0.00	0.00	9.49	5.05	0.79	15.78
Dulwich Village	0.00	0.00	1.07	14.71	2.75	0.48	5.42	3.03	1.45	28.91
LB Southwark Total	123.86	116.41	130.76	88.97	68.46	11.93	26.77	65.37	71.22	703.75
Central London/West End	88.72	53.68	42.30	44.37	35.74	46.53	66.42	143.89	4,694.73	5,216.37
Centres in LB Lambeth	5.90	2.21	3.20	7.94	3.30	1.43	78.95	69.42	258.53	430.88
Centres in LB Lewisham	8.60	7.51	10.47	18.45	102.00	65.62	18.30	2.02	232.97	465.94
Centres in LB Croydon	3.69	1.99	6.41	19.85	6.32	24.58	88.10	15.50	665.74	832.18
Centres in LB Bromley	1.97	1.10	8.33	33.16	24.47	53.93	11.18	1.68	407.47	543.30
Centres in RB Greenwich	0.00	3.09	1.50	0.23	9.07	9.31	11.86	0.00	198.68	233.74
Other Outside	13.02	34.90	10.68	20.55	25.57	25.29	37.27	39.09	1,857.45	2,063.83
Total Outside LB Southwark	121.89	104.48	82.90	144.54	206.48	226.68	312.09	271.60	8,315.57	9,786.23
TOTAL	245.75	220.90	213.66	233.51	274.94	238.61	338.86	336.97	8,386.79	10,489.98

Source: Table 3 and 4

Table 7: Comparison Goods Expenditure 2026 (£m) - No Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66		2,571.42
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	50.10	0.61	16.61	8.28	1.37	0.00	1.21	22.28	17.73	118.20
Bankside & Borough	4.00	11.60	1.51	0.80	0.34	0.56	0.40	1.65	3.68	24.55
Zone 2 - Southwark North East										
London Bridge	1.84	0.00	1.01	0.00	0.34	0.00	0.00	0.83	4.02	8.04
Surrey Quays/Canada Water	6.45	57.38	3.02	0.53	6.51	0.84	0.00	2.89	13.70	91.33
The Blue	6.76	7.63	0.25	0.00	1.03	0.00	0.00	0.41	0.85	16.93
Old Kent Road	73.77	63.18	73.00	33.65	39.38	3.10	4.84	37.14	36.45	364.49
Zone 3 - Southwark Central										
Peckham	6.76	19.23	46.32	17.89	30.13	8.45	2.82	1.24	6.99	139.83
Camberwell	4.61	0.92	2.77	1.60	0.00	0.00	1.61	0.83	0.65	12.99
Nunhead	0.61	0.31	1.26	1.34	0.34	0.00	0.40	0.00	0.22	4.48
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	6.80	20.56	2.40	0.56	2.82	2.89	1.90	37.93
Herne Hill	0.00	0.00	0.25	0.27	0.00	0.00	11.30	6.19	0.95	18.95
Dulwich Village	0.00	0.00	1.26	16.82	3.42	0.56	6.46	3.71	1.70	33.94
LB Southwark Total	154.91	160.85	154.06	101.74	85.26	14.08	31.88	80.06	88.83	871.65
Central London/West End	110.96	74.17	49.84	50.74	44.51	54.90	79.09	176.20	5,763.62	6,404.02
Centres in LB Lambeth	7.38	3.05	3.78	9.08	4.11	1.69	94.02	85.01	312.16	520.26
Centres in LB Lewisham	10.76	10.38	12.33	21.10	127.03	77.42	21.79	2.48	283.28	566.56
Centres in LB Croydon	4.61	2.75	7.55	22.70	7.88	29.00	104.91	18.98	793.49	991.87
Centres in LB Bromley	2.46	1.53	9.82	37.92	30.47	63.62	13.32	2.06	483.60	644.80
Centres in RB Greenwich	0.00	4.27	1.76	0.27	11.30	10.98	14.12	0.00	241.98	284.69
Other Outside	16.29	48.22	12.59	23.50	31.84	29.84	44.39	47.87	2,290.83	2,545.37
Total Outside LB Southwark	152.45	144.36	97.67	165.30	257.14	267.45	371.63	332.60	10,168.97	11,957.57
TOTAL	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66	10,257.80	12,829.21

Source: Table 3 and 4

Table 8: Comparison Goods Expenditure 2031 (£m) - No Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79		3,138.85
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	59.66	0.82	19.34	9.46	1.70	0.00	1.48	27.64	21.19	141.29
Bankside & Borough	4.76	15.55	1.76	0.92	0.42	0.67	0.49	2.05	4.70	31.31
Zone 2 - Southwark North East										
London Bridge	2.20	0.00	1.17	0.00	0.42	0.00	0.00	1.02	4.82	9.63
Surrey Quays/Canada Water	7.69	76.93	3.52	0.61	8.07	1.00	0.00	3.58	17.90	119.30
The Blue	8.05	10.23	0.29	0.00	1.27	0.00	0.00	0.51	1.07	21.43
Old Kent Road	87.84	84.71	84.96	38.47	48.87	3.68	5.93	46.06	44.50	445.02
Zone 3 - Southwark Central										
Peckham	8.05	25.78	53.91	20.46	37.40	10.04	3.46	1.54	8.45	169.08
Camberwell	5.49	1.23	3.22	1.83	0.00	0.00	1.98	1.02	0.78	15.55
Nunhead	0.73	0.41	1.46	1.53	0.42	0.00	0.49	0.00	0.27	5.32
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	7.91	23.51	2.97	0.67	3.46	3.58	2.22	44.32
Herne Hill	0.00	0.00	0.29	0.31	0.00	0.00	13.83	7.68	1.16	23.27
Dulwich Village	0.00	0.00	1.46	19.23	4.25	0.67	7.90	4.61	2.01	40.13
LB Southwark Total	184.46	215.66	179.29	116.32	105.82	16.74	39.01	99.29	109.06	1,065.65
Central London/West End	132.12	99.44	58.01	58.01	55.25	65.28	96.79	218.54	7,050.88	7,834.31
Centres in LB Lambeth	8.78	4.09	4.39	10.38	5.10	2.01	115.06	105.43	382.88	638.13
Centres in LB Lewisham	12.81	13.91	14.36	24.12	157.67	92.05	26.67	3.07	344.66	689.32
Centres in LB Croydon	5.49	3.68	8.79	25.95	9.77	34.48	128.40	23.54	960.43	1,200.54
Centres in LB Bromley	2.93	2.05	11.43	43.35	37.82	75.65	16.30	2.56	576.25	768.34
Centres in RB Greenwich	0.00	5.73	2.05	0.31	14.02	13.06	17.28	0.00	297.21	349.66
Other Outside	19.40	64.66	14.65	26.87	39.52	35.48	54.32	59.37	2,828.40	3,142.66
Total Outside LB Southwark	181.53	193.56	113.67	188.98	319.16	318.01	454.83	412.51	12,440.71	14,622.96
TOTAL	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79	12,549.77	15,688.62

Table 9: Comparison Goods Completions and Commitments

	Additional Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)	Comparison Goods Turnover 2021 (£m)
Zone 1 - Southwark North West (1)	21,172	15,879	91.19
Zone 2 - Southwark North East (2)	8,505	6,379	36.63
LB Southwark Total	29,677	22,258	127.83

Source: London Development Database March 2017 and LB Southwark (post March 2017)

(1) Increase of 35,287 sq.m gross assumed 60% comparison goods. Sales density at 2021 = £5,743 per sq.m net.

(2) Increase of 12,293 sq.m gross assumed 60% comparison goods. Sales density at 2021 = £5,743 per sq.m net.

Table 10: Trade Draw of Completions and Commitments at 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	35.0%	8.0%	14.0%	8.0%	1.0%	1.0%	1.0%	17.0%	15.0%	100.0%
Zone 2 - Commitments Trade Draw %	6.0%	62.0%	4.0%	1.0%	7.0%	1.0%	0.0%	4.0%	15.0%	100.0%
Zone 1 - Commitments Turnover £m	31.92	7.30	12.77	7.30	0.91	0.91	0.91	15.50	13.68	91.19
Zone 2 - Commitments Turnover £m	2.20	22.71	1.47	0.37	2.56	0.37	0.00	1.47	5.49	36.63

Source: Table 6 and NEMS Household Survey August 2014. Sales floorspace of commitments at £5,743 per sq.m net

Table 11: Comparison Goods Expenditure 2021 (£m) - With Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	245.75	220.90	213.66	233.51	274.94	238.61	338.86	336.97		2,103.19
Zone 1 - Southwark North West										
Zone 1 commitments	31.92	7.30	12.77	7.30	0.91	0.91	0.91	15.50	13.68	91.19
Elephant & Castle / Walworth Road	31.03	0.35	12.75	6.76	1.07	0.00	1.01	15.83	14.37	83.16
Bankside & Borough	2.48	6.61	1.16	0.65	0.27	0.47	0.34	1.17	2.80	15.94
Zone 2 - Southwark North East										
Zone 2 commitments	2.20	22.71	1.47	0.37	2.56	0.37	0.00	1.47	5.49	36.63
London Bridge	1.23	0.00	0.79	0.00	0.27	0.00	0.00	0.61	3.26	6.15
Surrey Quays/Canada Water	4.00	32.68	2.32	0.44	5.07	0.70	0.00	2.05	10.15	57.41
The Blue	4.49	4.64	0.20	0.00	0.81	0.00	0.00	0.30	0.64	11.09
Old Kent Road	45.69	35.99	56.02	27.48	30.69	2.58	4.03	26.38	29.15	258.00
Zone 3 - Southwark Central										
Peckham	4.19	10.95	35.54	14.61	23.49	7.02	2.35	0.88	5.69	104.72
Camberwell	3.06	0.56	2.18	1.33	0.00	0.00	1.35	0.61	0.53	9.62
Nunhead	0.44	0.20	1.02	1.13	0.27	0.00	0.34	0.00	0.19	3.57
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.35	17.09	1.88	0.47	2.36	2.13	1.61	30.89
Herne Hill	0.00	0.00	0.20	0.22	0.00	0.00	9.42	4.56	0.78	15.19
Dulwich Village	0.00	0.00	0.99	13.98	2.69	0.47	5.38	2.74	1.44	27.69
LB Southwark Total	130.72	121.98	132.75	91.35	69.98	12.99	27.48	74.22	89.78	751.24
Central London/West End	83.72	50.82	41.29	43.63	35.48	46.31	66.26	139.20	4,684.26	5,190.97
Centres in LB Lambeth	5.57	2.09	3.13	7.81	3.28	1.42	78.77	67.15	257.95	427.17
Centres in LB Lewisham	8.12	7.11	10.22	18.14	101.26	65.31	18.26	1.96	232.45	462.82
Centres in LB Croydon	3.48	1.88	6.26	19.52	6.28	24.46	87.90	15.00	664.26	829.03
Centres in LB Bromley	1.86	1.05	8.13	32.61	24.29	53.67	11.16	1.63	406.56	540.96
Centres in RB Greenwich	0.00	2.93	1.46	0.23	9.01	9.26	11.83	0.00	198.23	232.95
Other Outside	12.29	33.04	10.43	20.21	25.38	25.17	37.19	37.82	1,853.30	2,054.83
Total Outside LB Southwark	115.03	98.92	80.91	142.15	204.97	225.62	311.38	262.75	8,297.01	9,738.74
TOTAL	245.75	220.90	213.66	233.51	274.94	238.61	338.86	336.97	8,386.79	10,489.98

Source: Tables 6 and 10

Table 12: Comparison Goods Expenditure 2026 (£m) - With Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66		2,571.42
Zone 1 - Southwark North West										
Zone 1 commitments	39.92	10.08	15.04	8.34	1.14	1.08	1.09	18.98	16.72	112.39
Elephant & Castle / Walworth Road	38.81	0.48	15.02	7.73	1.33	0.00	1.20	19.38	17.57	101.52
Bankside & Borough	3.10	9.13	1.37	0.75	0.33	0.55	0.40	1.44	3.42	20.48
Zone 2 - Southwark North East										
Zone 2 commitments	2.75	31.38	1.73	0.42	3.19	0.43	0.00	1.79	6.72	48.41
London Bridge	1.53	0.00	0.93	0.00	0.33	0.00	0.00	0.74	3.98	7.53
Surrey Quays/Canada Water	5.00	45.16	2.73	0.50	6.31	0.83	0.00	2.51	12.41	75.45
The Blue	5.62	6.41	0.23	0.00	1.00	0.00	0.00	0.37	0.79	14.43
Old Kent Road	57.15	49.72	66.00	31.42	38.22	3.04	4.80	32.30	35.64	318.29
Zone 3 - Southwark Central										
Peckham	5.24	15.13	41.87	16.71	29.25	8.29	2.80	1.08	6.95	127.32
Camberwell	3.83	0.77	2.57	1.52	0.00	0.00	1.60	0.74	0.65	11.69
Nunhead	0.55	0.27	1.20	1.29	0.34	0.00	0.40	0.00	0.23	4.27
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	6.31	19.54	2.34	0.56	2.81	2.61	1.97	36.14
Herne Hill	0.00	0.00	0.23	0.25	0.00	0.00	11.22	5.59	0.96	18.25
Dulwich Village	0.00	0.00	1.17	15.99	3.35	0.56	6.41	3.35	1.76	32.58
LB Southwark Total	163.50	168.53	156.40	104.47	87.14	15.33	32.72	90.89	109.76	928.75
Central London/West End	104.71	70.22	48.65	49.90	44.18	54.64	78.91	170.46	5,727.10	6,348.77
Centres in LB Lambeth	6.96	2.89	3.69	8.93	4.08	1.68	93.80	82.24	315.38	519.64
Centres in LB Lewisham	10.15	9.82	12.04	20.75	126.10	77.06	21.74	2.40	284.20	564.25
Centres in LB Croydon	4.35	2.60	7.37	22.32	7.82	28.86	104.67	18.36	812.14	1,008.50
Centres in LB Bromley	2.32	1.44	9.58	37.29	30.25	63.33	13.29	2.00	497.07	656.57
Centres in RB Greenwich	0.00	4.05	1.72	0.26	11.22	10.93	14.09	0.00	242.37	284.63
Other Outside	15.37	45.66	12.28	23.11	31.61	29.70	44.28	46.31	2,265.90	2,514.23
Total Outside LB Southwark	143.87	136.68	95.33	162.57	255.25	266.20	370.78	321.77	10,144.15	11,896.59
TOTAL	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66	10,253.92	12,825.33

Source: Tables 6 and 10

Table 13: Comparison Goods Expenditure 2031 (£m) - With Completions and Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79		3,138.85
Zone 1 - Southwark North West										
Zone 1 commitments	47.54	13.51	17.51	9.54	1.41	1.28	1.33	23.55	20.41	136.07
Elephant & Castle / Walworth Road	46.22	0.64	17.48	8.84	1.65	0.00	1.47	24.04	21.44	121.78
Bankside & Borough	3.69	12.24	1.59	0.86	0.41	0.66	0.49	1.78	4.18	25.89
Zone 2 - Southwark North East										
Zone 2 commitments	3.27	42.08	2.01	0.48	3.96	0.51	0.00	2.23	8.20	62.74
London Bridge	1.82	0.00	1.09	0.00	0.42	0.00	0.00	0.92	4.86	9.11
Surrey Quays/Canada Water	5.95	60.55	3.18	0.57	7.84	0.99	0.00	3.12	15.14	97.33
The Blue	6.69	8.60	0.27	0.00	1.25	0.00	0.00	0.46	0.96	18.23
Old Kent Road	68.05	66.66	76.81	35.93	47.44	3.61	5.87	40.06	43.51	387.94
Zone 3 - Southwark Central										
Peckham	6.24	20.29	48.73	19.10	36.30	9.85	3.43	1.34	8.49	153.77
Camberwell	4.56	1.03	2.99	1.74	0.00	0.00	1.96	0.92	0.79	14.00
Nunhead	0.65	0.37	1.39	1.48	0.42	0.00	0.49	0.00	0.28	5.07
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	7.34	22.34	2.91	0.66	3.43	3.23	2.41	42.33
Herne Hill	0.00	0.00	0.27	0.29	0.00	0.00	13.73	6.93	1.17	22.39
Dulwich Village	0.00	0.00	1.36	18.28	4.16	0.66	7.85	4.16	2.14	38.60
LB Southwark Total	194.69	225.96	182.02	119.44	108.16	18.22	40.05	112.72	133.98	1,135.26
Central London/West End	124.68	94.14	56.62	57.05	54.84	64.97	96.57	211.42	6,990.89	7,751.19
Centres in LB Lambeth	8.29	3.87	4.29	10.21	5.06	2.00	114.80	102.00	384.97	635.49
Centres in LB Lewisham	12.09	13.17	14.01	23.72	156.51	91.62	26.61	2.97	346.91	687.62
Centres in LB Croydon	5.18	3.49	8.58	25.52	9.70	34.32	128.11	22.78	991.35	1,229.02
Centres in LB Bromley	2.76	1.94	11.15	42.64	37.55	75.30	16.26	2.48	606.76	796.83
Centres in RB Greenwich	0.00	5.42	2.00	0.30	13.92	12.99	17.25	0.00	295.85	347.73
Other Outside	18.31	61.21	14.30	26.42	39.23	35.32	54.20	57.43	2,765.91	3,072.33
Total Outside LB Southwark	171.31	183.25	110.94	185.86	316.82	316.52	453.79	399.07	12,382.64	14,520.21
TOTAL	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79	12,516.63	15,655.47

Source: Tables 6 and 10

Table 14: Comparison Goods Proposals at 2026

	Additional Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)	Comparison Goods Turnover 2021 (£M)
Zone 2 - Southwark North East (2)	31,500	23,625	149.81
Zone 3 - Southwark Central (2)	4,900	3,675	23.30
LB Southwark Total	36,400	27,300	173.11

Source: LB Southwark (pre-application estimate)

(1) Net increase of 45,000 sq.m gross at Canada Water assumed 70% comparison goods. Sales density at 2026 = £6,341 per sq.m net.

(2) Net increase of 7,000 sq.m gross at Aylesham Centre Peckham assumed 70% comparison goods. Sales density at 2026 = £6,341 per sq.m net.

Table 15: Turnover and Trade Draw of Proposals at 2026

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 2 - Proposals Trade Draw %	7.0%	61.0%	4.0%	1.0%	8.0%	1.0%	0.0%	3.0%	15.0%	100.0%
Zone 3 - Proposals Trade Draw %	7.0%	11.0%	33.0%	15.0%	19.0%	6.0%	3.0%	1.0%	5.0%	100.0%
Zone 2 - Proposals Turnover £M	10.49	91.38	5.99	1.50	11.98	1.50	0.00	4.49	22.47	149.81
Zone 3 - Proposals Turnover £M	1.63	2.56	7.69	3.50	4.43	1.40	0.70	0.23	1.17	23.30

Table 16: Comparison Goods Expenditure 2026 (£m) - With Completions, Commitments and Proposals

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66		2,571.42
Zone 1 - Southwark North West										
Zone 1 commitments	37.91	6.82	14.23	8.12	1.05	1.05	1.08	18.56	16.61	105.44
Elephant & Castle / Walworth Road	36.86	0.33	14.21	7.52	1.23	0.00	1.19	18.95	17.45	97.74
Bankside & Borough	2.94	6.18	1.29	0.73	0.31	0.54	0.40	1.40	3.40	17.19
Zone 2 - Southwark North East										
Zone 2 proposals	10.49	91.38	5.99	1.50	11.98	1.50	0.00	4.49	22.47	149.81
Zone 2 commitments	2.61	21.25	1.63	0.41	2.96	0.42	0.00	1.75	6.67	37.70
London Bridge	1.46	0.00	0.88	0.00	0.31	0.00	0.00	0.73	3.95	7.33
Surrey Quays/Canada Water	4.50	15.99	2.44	0.47	5.37	0.79	0.00	2.40	12.24	44.19
The Blue	5.34	4.34	0.22	0.00	0.93	0.00	0.00	0.36	0.78	11.97
Old Kent Road	53.31	28.31	61.26	30.30	34.43	2.94	4.77	31.34	35.32	281.98
Zone 3 - Southwark Central										
Zone 3 proposals	1.63	2.56	7.69	3.50	4.43	1.40	0.70	0.23	1.17	23.30
Peckham	4.71	5.36	37.37	15.81	24.89	7.87	2.77	1.03	6.86	106.67
Camberwell	3.64	0.52	2.43	1.48	0.00	0.00	1.60	0.73	0.64	11.04
Nunhead	0.53	0.21	1.16	1.27	0.32	0.00	0.40	0.00	0.23	4.11
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.97	19.02	2.17	0.54	2.79	2.55	1.96	35.00
Herne Hill	0.00	0.00	0.22	0.25	0.00	0.00	11.17	5.46	0.95	18.05
Dulwich Village	0.00	0.00	1.11	15.56	3.10	0.54	6.38	3.28	1.74	31.71
LB Southwark Total	165.91	183.25	158.11	105.93	93.48	17.58	33.26	93.27	132.45	983.24
Central London/West End	102.95	62.66	47.77	49.45	43.09	54.18	78.79	169.20	5,714.29	6,322.38
Centres in LB Lambeth	6.84	2.58	3.62	8.85	3.98	1.67	93.67	81.63	314.67	517.50
Centres in LB Lewisham	9.98	8.77	11.82	20.56	122.97	76.41	21.71	2.38	283.56	558.16
Centres in LB Croydon	4.28	2.32	7.24	22.12	7.62	28.62	104.52	18.23	810.32	1,005.27
Centres in LB Bromley	2.28	1.29	9.41	36.96	29.50	62.79	13.27	1.98	495.96	653.44
Centres in RB Greenwich	0.00	3.61	1.69	0.26	10.94	10.84	14.07	0.00	241.82	283.23
Other Outside	15.11	40.74	12.06	22.90	30.82	29.45	44.22	45.97	2,260.83	2,502.11
Total Outside LB Southwark	141.45	121.96	93.62	161.11	248.92	263.95	370.24	319.38	10,121.46	11,842.09
TOTAL	307.36	305.21	251.72	267.04	342.39	281.53	403.50	412.66	10,253.92	12,825.33

Source: Tables 12 and 15

Table 17: Comparison Goods Expenditure 2031 (£m) - With Completions, Commitments and Proposals

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79		3,138.85
Zone 1 - Southwark North West										
Zone 1 commitments	45.14	9.15	16.56	9.28	1.30	1.25	1.32	23.02	20.28	127.31
Elephant & Castle / Walworth Road	43.89	0.44	16.54	8.60	1.53	0.00	1.46	23.50	21.30	117.26
Bankside & Borough	3.50	8.29	1.50	0.83	0.38	0.64	0.49	1.74	4.15	21.52
Zone 2 - Southwark North East										
Zone 2 proposals	12.49	122.52	6.97	1.71	14.88	1.78	0.00	5.57	27.43	193.36
Zone 2 commitments	3.11	28.49	1.90	0.47	3.67	0.50	0.00	2.18	8.15	48.45
London Bridge	1.73	0.00	1.03	0.00	0.38	0.00	0.00	0.90	4.83	8.88
Surrey Quays/Canada Water	5.35	21.43	2.84	0.54	6.67	0.94	0.00	2.98	14.94	55.69
The Blue	6.35	5.82	0.26	0.00	1.15	0.00	0.00	0.45	0.95	14.99
Old Kent Road	63.48	37.96	71.30	34.64	42.73	3.49	5.84	38.87	43.12	341.42
Zone 3 - Southwark Central										
Zone 3 proposals	1.94	3.44	8.95	4.00	5.50	1.66	0.86	0.29	1.42	28.05
Peckham	5.61	7.18	43.49	18.08	30.90	9.35	3.40	1.28	8.37	127.65
Camberwell	4.33	0.70	2.83	1.69	0.00	0.00	1.95	0.90	0.79	13.20
Nunhead	0.63	0.29	1.34	1.45	0.40	0.00	0.49	0.00	0.28	4.87
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	6.95	21.74	2.69	0.64	3.42	3.16	2.39	41.00
Herne Hill	0.00	0.00	0.26	0.28	0.00	0.00	13.67	6.77	1.16	22.15
Dulwich Village	0.00	0.00	1.29	17.79	3.85	0.64	7.81	4.06	2.13	37.57
LB Southwark Total	197.56	245.69	184.01	121.11	116.03	20.90	40.71	115.68	161.68	1,203.37
Central London/West End	122.59	84.01	55.60	56.54	53.48	64.42	96.43	209.85	6,975.25	7,718.17
Centres in LB Lambeth	8.15	3.46	4.21	10.12	4.94	1.98	114.64	101.24	384.11	632.84
Centres in LB Lewisham	11.89	11.75	13.76	23.51	152.63	90.85	26.57	2.95	346.14	680.04
Centres in LB Croydon	5.09	3.11	8.42	25.29	9.46	34.03	127.92	22.61	989.13	1,225.07
Centres in LB Bromley	2.72	1.73	10.95	42.25	36.61	74.66	16.24	2.46	605.40	793.03
Centres in RB Greenwich	0.00	4.84	1.97	0.30	13.58	12.88	17.22	0.00	295.19	345.97
Other Outside	18.00	54.62	14.04	26.19	38.26	35.02	54.12	57.01	2,759.72	3,056.98
Total Outside LB Southwark	168.43	163.52	108.95	184.20	308.96	313.85	453.13	396.11	12,354.95	14,452.10
TOTAL	366.00	409.22	292.96	305.30	424.99	334.74	493.84	511.79	12,516.63	15,655.47

Source: Tables 12 and 15

Table 18: Summary of Comparison Goods - With Completions and Commitments

	2014	2021	2026	2031
Available Expenditure in Southwark (£m)				
Zone 1 - Southwark North West	84.27	190.29	234.39	283.74
Zone 2 - Southwark North East	283.84	369.27	464.11	575.35
Zone 3 - Southwark Central	99.54	117.91	143.28	172.84
Zone 4 - Southwark South	62.46	73.77	86.97	103.32
Total	530.10	751.24	928.75	1,135.26
Turnover of Existing Facilities (£m)				
Zone 1 - Southwark North West	84.27	96.80	106.88	118.00
Zone 2 - Southwark North East	283.84	326.04	359.97	397.44
Zone 3 - Southwark Central	99.54	114.34	126.24	139.38
Zone 4 - Southwark South	62.46	71.74	79.21	87.46
Total	530.10	608.92	672.30	742.27
Turnover of Commitments (£m)				
Zone 1 - Southwark North West	n/a	91.19	100.68	111.16
Zone 2 - Southwark North East	n/a	36.63	40.45	44.66
Zone 3 - Southwark Central	n/a	0.00	0.00	0.00
Zone 4 - Southwark South	n/a	0.00	0.00	0.00
Total	n/a	127.83	141.13	155.82
Surplus/Deficit Expenditure (£m)				
Zone 1 - Southwark North West	n/a	2.29	26.83	54.57
Zone 2 - Southwark North East	n/a	6.60	63.69	133.26
Zone 3 - Southwark Central	n/a	3.57	17.04	33.47
Zone 4 - Southwark South	n/a	2.03	7.75	15.87
Total	n/a	14.49	115.31	237.17

Source: Tables 5 to 13

Table 19: Comparison Goods Floorspace Expenditure Capacity 2014 to 2031 - over and above completions/commitments

	2014	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,743	£6,341	£7,001
Floorspace Requirement (sq.m net)				
Zone 1 - Southwark North West	n/a	399	4,231	7,795
Zone 2 - Southwark North East	n/a	1,150	10,044	19,034
Zone 3 - Southwark Central	n/a	622	2,687	4,780
Zone 4 - Southwark South	n/a	353	1,223	2,266
Total	n/a	2,523	18,185	33,875
Floorspace Requirement (sq.m gross)				
Zone 1 - Southwark North West	n/a	532	5,641	10,393
Zone 2 - Southwark North East	n/a	1,533	13,392	25,378
Zone 3 - Southwark Central	n/a	829	3,583	6,374
Zone 4 - Southwark South	n/a	470	1,631	3,022
Total	n/a	3,364	24,247	45,166

Table 20: Summary of Comparison Goods - With Completions, Commitments and Proposals

	2014	2021	2026	2031
Available Expenditure in Southwark (£m)				
Zone 1 - Southwark North West	84.27	190.29	220.37	266.09
Zone 2 - Southwark North East	283.84	369.27	532.98	662.79
Zone 3 - Southwark Central	99.54	117.91	145.13	173.78
Zone 4 - Southwark South	62.46	73.77	84.76	100.72
Total	530.10	751.24	983.24	1,203.37
Turnover of Existing Facilities (£m)				
Zone 1 - Southwark North West	84.27	96.80	106.88	118.00
Zone 2 - Southwark North East	283.84	326.04	359.97	397.44
Zone 3 - Southwark Central	99.54	114.34	126.24	139.38
Zone 4 - Southwark South	62.46	71.74	79.21	87.46
Total	530.10	608.92	672.30	742.27
Turnover of Commitments/Proposals (£m)				
Zone 1 - Southwark North West	n/a	91.19	100.68	111.16
Zone 2 - Southwark North East	n/a	36.63	190.25	210.05
Zone 3 - Southwark Central	n/a	0.00	23.30	25.73
Zone 4 - Southwark South	n/a	0.00	0.00	0.00
Total	n/a	127.83	314.24	346.95
Surplus/Deficit Expenditure (£m)				
Zone 1 - Southwark North West	n/a	2.29	12.81	36.92
Zone 2 - Southwark North East	n/a	6.60	-17.24	55.30
Zone 3 - Southwark Central	n/a	3.57	-4.42	8.67
Zone 4 - Southwark South	n/a	2.03	5.55	13.26
Total	n/a	14.49	-3.30	114.15

Source: Tables 5 to 17

Table 21: Comparison Goods Floorspace Expenditure Capacity 2014 to 2031 - over and above completions/commiments/proposals

	2014	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,743	£6,341	£7,001
Floorspace Requirement (sq.m net)				
Zone 1 - Southwark North West	n/a	399	2,019	5,274
Zone 2 - Southwark North East	n/a	1,150	-2,719	7,898
Zone 3 - Southwark Central	n/a	622	-696	1,238
Zone 4 - Southwark South	n/a	353	875	1,894
Total	n/a	2,523	-520	16,305
Floorspace Requirement (sq.m gross)				
Zone 1 - Southwark North West	n/a	532	2,693	7,032
Zone 2 - Southwark North East	n/a	1,533	-3,625	10,531
Zone 3 - Southwark Central	n/a	829	-928	1,651
Zone 4 - Southwark South	n/a	470	1,167	2,525
Total	n/a	3,364	-694	21,739

Appendix 4: Food and Beverage Capacity

Table 1: Study Area Population

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	71,317	74,431	81,088	95,696	103,256	105,289
Zone 2 - Southwark North East	69,747	73,464	78,293	87,346	104,116	119,539
Zone 3 - Southwark Central	85,282	88,937	93,028	98,506	100,124	99,785
Zone 4 - Southwark South	63,002	66,349	68,914	69,530	68,600	67,160
Zone 5 - Lewisham North West	80,858	85,500	91,308	98,186	105,486	112,120
Zone 6 - Lewisham South West	73,736	76,873	78,311	79,349	80,768	82,238
Zone 7 - Lambeth South East	105,477	109,081	111,018	113,496	116,595	122,196
Zone 8 - Lambeth North East	100,307	105,294	110,605	117,791	124,445	132,167
Total	649,726	679,929	712,565	759,900	803,390	840,494

Source:

Southwark Borough Preferred Option - Interim 2015-based BPO Projection (GLA 2017)
GLA 2015 - Based Demographic Projections (ward projections published February 2017) for zones 5 to 8

Table 2: Food & Beverage Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	1,371	1,422	1,482	1,580	1,686
Zone 2 - Southwark North East	1,312	1,361	1,418	1,512	1,613
Zone 3 - Southwark Central	977	1,014	1,056	1,126	1,202
Zone 4 - Southwark South	1,664	1,727	1,798	1,918	2,046
Zone 5 - Lewisham North West	1,378	1,430	1,489	1,588	1,694
Zone 6 - Lewisham South West	1,323	1,372	1,429	1,525	1,626
Zone 7 - Lambeth South East	1,498	1,555	1,619	1,727	1,842
Zone 8 - Lambeth North East	1,629	1,690	1,760	1,877	2,003

Sources:

Experian Local Expenditure 2015 (2015 prices)

Growth Rates: 1.9% 2015-2016, 0.5% 2016-2017, 0.2% 2017 to 2018, 1.3% p.a. from 2019 to 2023 and 1.5% from 2024

Table 3: Total Food and Beverage Expenditure (£m)

Zone	2014	2017	2021	2026	2031
Zone 1 - Southwark North West	102.04	115.35	141.79	163.19	177.51
Zone 2 - Southwark North East	96.38	106.56	123.82	157.44	192.83
Zone 3 - Southwark Central	86.89	94.32	104.02	112.79	119.90
Zone 4 - Southwark South	110.40	118.99	125.04	131.60	137.44
Zone 5 - Lewisham North West	117.82	130.54	146.21	167.56	189.98
Zone 6 - Lewisham South West	101.70	107.47	113.42	123.15	133.75
Zone 7 - Lambeth South East	163.40	172.59	183.78	201.39	225.14
Zone 8 - Lambeth North East	171.52	186.90	207.32	233.64	264.69
Total	950.18	1,032.69	1,145.40	1,290.76	1,441.24

Source: Tables 1 and 2

Table 4: Base Year Food and Beverage Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Elephant & Castle / Walworth Road	1.4%	0.6%	7.8%	0.0%	0.0%	0.0%	0.2%	0.7%	15.0%
Southwark/Bankside/Borough	6.8%	16.9%	0.0%	0.3%	0.5%	0.0%	0.1%	0.3%	15.0%
Zone 2 - Southwark North East									
London Bridge	8.2%	2.9%	2.5%	0.0%	0.2%	0.2%	0.6%	3.8%	50.0%
Surrey Quays/Canada Water/Rotherhithe	1.0%	24.0%	0.8%	0.6%	1.1%	0.0%	0.4%	2.3%	15.0%
The Blue	15.9%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.0%
Old Kent Road	0.4%	0.7%	0.2%	1.5%	0.8%	0.0%	0.0%	0.0%	10.0%
Zone 3 - Southwark Central									
Peckham	15.1%	4.0%	15.1%	3.6%	9.2%	1.6%	0.7%	0.3%	5.0%
Camberwell	2.4%	0.0%	11.2%	3.5%	0.0%	2.1%	2.5%	5.2%	5.0%
Nunhead	0.0%	4.1%	3.5%	0.0%	1.0%	0.0%	0.0%	0.0%	5.0%
Zone 4 - Southwark South									
Lordship Lane	0.6%	0.5%	14.3%	32.5%	1.6%	7.5%	1.0%	0.0%	5.0%
Herne Hill	0.0%	0.0%	3.6%	1.5%	0.9%	0.3%	2.4%	4.4%	5.0%
Dulwich Village	2.7%	0.0%	0.8%	8.9%	1.5%	1.3%	3.9%	0.0%	5.0%
LB Southwark Total	54.5%	56.8%	59.8%	52.4%	16.8%	13.0%	11.8%	17.6%	
Central London/West End	28.9%	20.0%	16.7%	30.5%	23.9%	19.1%	16.2%	50.9%	95.0%
Centres in LB Lambeth	8.7%	0.0%	3.1%	5.6%	6.4%	1.9%	32.3%	20.3%	60.0%
Centres in LB Lewisham	3.1%	0.6%	0.0%	0.5%	16.9%	21.2%	0.4%	0.0%	60.0%
Centres in LB Croydon	0.4%	0.0%	2.7%	0.0%	8.9%	2.1%	9.3%	0.0%	80.0%
Centres in LB Bromley	0.0%	0.3%	0.5%	5.0%	3.4%	16.0%	17.5%	0.0%	75.0%
Centres in RB Greenwich	0.0%	0.0%	0.3%	0.0%	0.5%	0.0%	0.0%	0.0%	99.0%
Other Outside	4.4%	22.3%	16.9%	6.0%	23.2%	26.7%	12.5%	11.2%	90.0%
Total Outside LB Southwark	45.5%	43.2%	40.2%	47.6%	83.2%	87.0%	88.2%	82.4%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2014

Table 5: Base Year 2014 Food and Beverage Expenditure (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	102.04	96.38	86.89	110.40	117.82	101.70	163.40	171.52		950.18
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	1.43	0.58	6.78	0.00	0.00	0.00	0.33	1.20	1.82	12.13
Southwark/Bankside/Borough	6.94	16.29	0.00	0.33	0.59	0.00	0.16	0.51	4.38	29.21
Zone 2 - Southwark North East										
London Bridge	8.37	2.80	2.17	0.00	0.24	0.20	0.98	6.52	21.27	42.54
Surrey Quays/Canada Water/Rotherhithe	1.02	23.13	0.70	0.66	1.30	0.00	0.65	3.95	5.54	36.95
The Blue	16.23	2.99	0.00	0.00	0.00	0.00	0.00	1.03	1.07	21.31
Old Kent Road	0.41	0.67	0.17	1.66	0.94	0.00	0.00	0.00	0.43	4.28
Zone 3 - Southwark Central										
Peckham	15.41	3.86	13.12	3.97	10.84	1.63	1.14	0.51	2.66	53.14
Camberwell	2.45	0.00	9.73	3.86	0.00	2.14	4.09	8.92	1.64	32.83
Nunhead	0.00	3.95	3.04	0.00	1.18	0.00	0.00	0.00	0.43	8.60
Zone 4 - Southwark South										
Lordship Lane	0.61	0.48	12.43	35.88	1.89	7.63	1.63	0.00	3.19	63.73
Herne Hill	0.00	0.00	3.13	1.66	1.06	0.31	3.92	7.55	0.93	18.55
Dulwich Village	2.76	0.00	0.70	9.83	1.77	1.32	6.37	0.00	1.20	23.94
LB Southwark Total	55.61	54.75	51.96	57.85	19.79	13.22	19.28	30.19	44.55	347.21
Central London/West End	29.49	19.28	14.51	33.67	28.16	19.43	26.47	87.31	4,907.95	5,166.27
Centres in LB Lambeth	8.88	0.00	2.69	6.18	7.54	1.93	52.78	34.82	172.24	287.06
Centres in LB Lewisham	3.16	0.58	0.00	0.55	19.91	21.56	0.65	0.00	69.63	116.05
Centres in LB Croydon	0.41	0.00	2.35	0.00	10.49	2.14	15.20	0.00	122.29	152.86
Centres in LB Bromley	0.00	0.29	0.43	5.52	4.01	16.27	28.60	0.00	165.35	220.47
Centres in RB Greenwich	0.00	0.00	0.26	0.00	0.59	0.00	0.00	0.00	84.13	84.98
Other Outside	4.49	21.49	14.68	6.62	27.33	27.15	20.43	19.21	1,272.76	1,414.18
Total Outside LB Southwark	46.43	41.64	34.93	52.55	98.03	88.48	144.12	141.34	6,794.35	7,441.86
TOTAL	102.04	96.38	86.89	110.40	117.82	101.70	163.40	171.52	6,838.90	7,789.07

Source: Table 3 and 4

Table 6: Food and Beverage Expenditure 2021 (£m) - No commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	141.79	123.82	104.02	125.04	146.21	113.42	183.78	207.32		1,145.40
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	1.98	0.74	8.11	0.00	0.00	0.00	0.37	1.45	2.23	14.89
Southwark/Bankside/Borough	9.64	20.93	0.00	0.38	0.73	0.00	0.18	0.62	5.73	38.21
Zone 2 - Southwark North East										
London Bridge	11.63	3.59	2.60	0.00	0.29	0.23	1.10	7.88	27.32	54.64
Surrey Quays/Canada Water/Rotherhithe	1.42	29.72	0.83	0.75	1.61	0.00	0.74	4.77	7.03	46.86
The Blue	22.54	3.84	0.00	0.00	0.00	0.00	0.00	1.24	1.45	29.08
Old Kent Road	0.57	0.87	0.21	1.88	1.17	0.00	0.00	0.00	0.52	5.21
Zone 3 - Southwark Central										
Peckham	21.41	4.95	15.71	4.50	13.45	1.81	1.29	0.62	3.36	67.10
Camberwell	3.40	0.00	11.65	4.38	0.00	2.38	4.59	10.78	1.96	39.14
Nunhead	0.00	5.08	3.64	0.00	1.46	0.00	0.00	0.00	0.54	10.72
Zone 4 - Southwark South										
Lordship Lane	0.85	0.62	14.88	40.64	2.34	8.51	1.84	0.00	3.67	73.34
Herne Hill	0.00	0.00	3.74	1.88	1.32	0.34	4.41	9.12	1.10	21.90
Dulwich Village	3.83	0.00	0.83	11.13	2.19	1.47	7.17	0.00	1.40	28.03
LB Southwark Total	77.27	70.33	62.21	65.52	24.56	14.74	21.69	36.49	56.30	429.11
Central London/West End	40.98	24.76	17.37	38.14	34.94	21.66	29.77	105.52	5,949.92	6,263.07
Centres in LB Lambeth	12.34	0.00	3.22	7.00	9.36	2.15	59.36	42.09	203.28	338.80
Centres in LB Lewisham	4.40	0.74	0.00	0.63	24.71	24.04	0.74	0.00	82.88	138.13
Centres in LB Croydon	0.57	0.00	2.81	0.00	13.01	2.38	17.09	0.00	143.45	179.31
Centres in LB Bromley	0.00	0.37	0.52	6.25	4.97	18.15	32.16	0.00	187.27	249.69
Centres in RB Greenwich	0.00	0.00	0.31	0.00	0.73	0.00	0.00	0.00	103.27	104.31
Other Outside	6.24	27.61	17.58	7.50	33.92	30.28	22.97	23.22	1,523.96	1,693.28
Total Outside LB Southwark	64.51	53.49	41.82	59.52	121.65	98.67	162.09	170.83	8,194.01	8,966.59
TOTAL	141.79	123.82	104.02	125.04	146.21	113.42	183.78	207.32	8,250.31	9,395.71

Source: Table 3 and 4

Table 7: Food and Beverage Expenditure 2026 (£m) - No commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64		1,290.76
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	2.28	0.94	8.80	0.00	0.00	0.00	0.40	1.64	2.48	16.55
Southwark/Bankside/Borough	11.10	26.61	0.00	0.39	0.84	0.00	0.20	0.70	7.03	46.87
Zone 2 - Southwark North East										
London Bridge	13.38	4.57	2.82	0.00	0.34	0.25	1.21	8.88	31.44	62.87
Surrey Quays/Canada Water/Rotherhithe	1.63	37.79	0.90	0.79	1.84	0.00	0.81	5.37	8.67	57.80
The Blue	25.95	4.88	0.00	0.00	0.00	0.00	0.00	1.40	1.70	33.93
Old Kent Road	0.65	1.10	0.23	1.97	1.34	0.00	0.00	0.00	0.59	5.88
Zone 3 - Southwark Central										
Peckham	24.64	6.30	17.03	4.74	15.42	1.97	1.41	0.70	3.80	76.00
Camberwell	3.92	0.00	12.63	4.61	0.00	2.59	5.03	12.15	2.15	43.08
Nunhead	0.00	6.46	3.95	0.00	1.68	0.00	0.00	0.00	0.64	12.71
Zone 4 - Southwark South										
Lordship Lane	0.98	0.79	16.13	42.77	2.68	9.24	2.01	0.00	3.93	78.52
Herne Hill	0.00	0.00	4.06	1.97	1.51	0.37	4.83	10.28	1.21	24.24
Dulwich Village	4.41	0.00	0.90	11.71	2.51	1.60	7.85	0.00	1.53	30.52
LB Southwark Total	88.94	89.43	67.45	68.96	28.15	16.01	23.76	41.12	65.16	488.97
Central London/West End	47.16	31.49	18.84	40.14	40.05	23.52	32.62	118.92	6,702.07	7,054.81
Centres in LB Lambeth	14.20	0.00	3.50	7.37	10.72	2.34	65.05	47.43	225.91	376.51
Centres in LB Lewisham	5.06	0.94	0.00	0.66	28.32	26.11	0.81	0.00	92.84	154.73
Centres in LB Croydon	0.65	0.00	3.05	0.00	14.91	2.59	18.73	0.00	159.70	199.63
Centres in LB Bromley	0.00	0.47	0.56	6.58	5.70	19.70	35.24	0.00	204.78	273.04
Centres in RB Greenwich	0.00	0.00	0.34	0.00	0.84	0.00	0.00	0.00	116.44	117.61
Other Outside	7.18	35.11	19.06	7.90	38.87	32.88	25.17	26.17	1,731.08	1,923.43
Total Outside LB Southwark	74.25	68.02	45.34	62.64	139.41	107.14	177.62	192.52	9,232.82	10,099.76
TOTAL	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64	9,297.97	10,588.73

Source: Table 3 and 4

Table 8: Food and Beverage Expenditure 2031 (£m) - No commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69		1,441.24
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	2.49	1.16	9.35	0.00	0.00	0.00	0.45	1.85	2.70	18.00
Southwark/Bankside/Borough	12.07	32.59	0.00	0.41	0.95	0.00	0.23	0.79	8.30	55.34
Zone 2 - Southwark North East										
London Bridge	14.56	5.59	3.00	0.00	0.38	0.27	1.35	10.06	35.20	70.40
Surrey Quays/Canada Water/Rotherhithe	1.78	46.28	0.96	0.82	2.09	0.00	0.90	6.09	10.40	69.31
The Blue	28.22	5.98	0.00	0.00	0.00	0.00	0.00	1.59	1.88	37.67
Old Kent Road	0.71	1.35	0.24	2.06	1.52	0.00	0.00	0.00	0.65	6.53
Zone 3 - Southwark Central										
Peckham	26.80	7.71	18.11	4.95	17.48	2.14	1.58	0.79	4.19	83.74
Camberwell	4.26	0.00	13.43	4.81	0.00	2.81	5.63	13.76	2.35	47.05
Nunhead	0.00	7.91	4.20	0.00	1.90	0.00	0.00	0.00	0.74	14.74
Zone 4 - Southwark South										
Lordship Lane	1.07	0.96	17.15	44.67	3.04	10.03	2.25	0.00	4.17	83.33
Herne Hill	0.00	0.00	4.32	2.06	1.71	0.40	5.40	11.65	1.34	26.88
Dulwich Village	4.79	0.00	0.96	12.23	2.85	1.74	8.78	0.00	1.65	33.00
LB Southwark Total	96.74	109.53	71.70	72.02	31.92	17.39	26.57	46.59	73.57	546.02
Central London/West End	51.30	38.57	20.02	41.92	45.40	25.55	36.47	134.73	7,485.21	7,879.17
Centres in LB Lambeth	15.44	0.00	3.72	7.70	12.16	2.54	72.72	53.73	252.01	420.02
Centres in LB Lewisham	5.50	1.16	0.00	0.69	32.11	28.36	0.90	0.00	103.06	171.77
Centres in LB Croydon	0.71	0.00	3.24	0.00	16.91	2.81	20.94	0.00	178.41	223.01
Centres in LB Bromley	0.00	0.58	0.60	6.87	6.46	21.40	39.40	0.00	225.93	301.24
Centres in RB Greenwich	0.00	0.00	0.36	0.00	0.95	0.00	0.00	0.00	129.65	130.96
Other Outside	7.81	43.00	20.26	8.25	44.07	35.71	28.14	29.65	1,952.06	2,168.95
Total Outside LB Southwark	80.77	83.30	48.20	65.42	158.06	116.37	198.58	218.10	10,326.34	11,295.13
TOTAL	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69	10,399.91	11,841.15

Source: Table 3 and 4

Table 9: Food and Beverage Commitments and Completions Turnover/Trade Draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	19%	43%	16%	1%	1%	0%	1%	4%	15%	100%
Zone 2 - Commitments Trade Draw %	3%	65%	2%	1%	3%	0%	2%	9%	15%	100%
Zone 3 - Commitments Trade Draw %	21%	8%	27%	8%	13%	3%	5%	10%	5%	100%
Zone 1 - Commitments Turnover £m	16.56	37.47	13.94	0.87	0.87	0.00	0.87	3.49	13.07	87.14
Zone 2 - Commitments Turnover £m	0.13	2.78	0.09	0.04	0.13	0.00	0.09	0.39	0.64	4.28
Zone 3 - Commitments Turnover £m	1.37	0.52	1.77	0.52	0.85	0.20	0.33	0.65	0.33	6.54

Source: NEMS Household Survey August 2014. Sales density of commitments at £5,361 per sq.m gross at 2021.

Source: London Development Database March 2017 and LB Southwark (post March 2017)

(1) Net increase of 16,254 sq.m gross - turnover = £87.14m.

(2) Net increase of 798 sq.m gross - turnover = £4.28m.

(3) Net increase of 1,219 sq.m gross - turnover = £6.54m.

Table 10: Food and Beverage Expenditure 2021 (£m) - With Commitments/Completions

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	141.79	123.82	104.02	125.04	146.21	113.42	183.78	207.32		1,145.40
Zone 1 - Southwark North West										
Zone 1 - Commitments	16.56	37.47	13.94	0.87	0.87	0.00	0.87	3.49	13.07	87.14
Elephant & Castle / Walworth Road	1.62	0.39	6.13	0.00	0.00	0.00	0.36	1.41	2.23	12.14
Southwark/Bankside/Borough	7.85	10.90	0.00	0.37	0.72	0.00	0.18	0.60	5.72	26.34
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.13	2.78	0.09	0.04	0.13	0.00	0.09	0.39	0.64	4.28
London Bridge	10.55	2.73	2.28	0.00	0.29	0.23	1.10	7.76	27.29	52.23
Surrey Quays/Canada Water/Rotherhithe	1.29	22.60	0.73	0.74	1.59	0.00	0.73	4.70	7.02	39.41
The Blue	20.45	2.92	0.00	0.00	0.00	0.00	0.00	1.23	1.45	26.05
Old Kent Road	0.51	0.66	0.18	1.86	1.16	0.00	0.00	0.00	0.52	4.89
Zone 3 - Southwark Central										
Zone 3 - Commitments	1.37	0.52	1.77	0.52	0.85	0.20	0.33	0.65	0.33	6.54
Peckham	19.42	3.77	13.79	4.46	13.31	1.81	1.28	0.61	3.35	61.81
Camberwell	3.09	0.00	10.23	4.34	0.00	2.38	4.57	10.63	1.96	37.18
Nunhead	0.00	3.86	3.20	0.00	1.45	0.00	0.00	0.00	0.54	9.04
Zone 4 - Southwark South										
Lordship Lane	0.77	0.47	13.06	40.28	2.32	8.49	1.83	0.00	3.66	70.89
Herne Hill	0.00	0.00	3.29	1.86	1.30	0.34	4.38	8.99	1.09	21.26
Dulwich Village	3.47	0.00	0.73	11.03	2.17	1.47	7.12	0.00	1.40	27.40
LB Southwark Total	87.07	89.07	69.42	66.38	26.16	14.92	22.84	40.46	70.28	486.60
Central London/West End	33.36	12.90	13.13	37.47	34.23	21.60	29.41	102.49	5,938.16	6,222.77
Centres in LB Lambeth	11.19	0.00	2.83	6.94	9.26	2.15	59.00	41.48	203.08	335.94
Centres in LB Lewisham	3.99	0.57	0.00	0.62	24.46	24.01	0.73	0.00	82.80	137.17
Centres in LB Croydon	0.51	0.00	2.47	0.00	12.88	2.38	16.99	0.00	143.30	178.53
Centres in LB Bromley	0.00	0.28	0.46	6.20	4.92	18.12	31.97	0.00	187.08	249.03
Centres in RB Greenwich	0.00	0.00	0.27	0.00	0.72	0.00	0.00	0.00	103.17	104.16
Other Outside	5.66	21.00	15.44	7.44	33.58	30.24	22.83	22.89	1,522.45	1,681.51
Total Outside LB Southwark	54.71	34.75	34.60	58.66	120.05	98.50	160.94	166.86	8,180.04	8,909.11
TOTAL	141.79	123.82	104.02	125.04	146.21	113.42	183.78	207.32	8,250.31	9,395.71

Source: Tables 6 and 9

Table 11: Food and Beverage Expenditure 2026 (£m) - With Commitments/Completions

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64		1,290.76
Zone 1 - Southwark North West										
Zone 1 - Commitments	19.06	47.64	15.12	0.92	1.00	0.00	0.95	3.93	14.73	103.35
Elephant & Castle / Walworth Road	1.86	0.49	6.65	0.00	0.00	0.00	0.40	1.59	2.51	13.50
Southwark/Bankside/Borough	9.04	13.86	0.00	0.39	0.82	0.00	0.20	0.68	6.45	31.43
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.15	3.54	0.09	0.05	0.15	0.00	0.09	0.43	0.72	5.22
London Bridge	12.14	3.47	2.48	0.00	0.33	0.25	1.20	8.75	30.75	59.37
Surrey Quays/Canada Water/Rotherhithe	1.48	28.74	0.79	0.78	1.82	0.00	0.80	5.30	7.91	47.63
The Blue	23.54	3.71	0.00	0.00	0.00	0.00	0.00	1.38	1.64	30.27
Old Kent Road	0.59	0.84	0.20	1.96	1.33	0.00	0.00	0.00	0.59	5.50
Zone 3 - Southwark Central										
Zone 3 - Commitments	1.58	0.67	1.91	0.55	0.97	0.21	0.36	0.74	0.37	7.36
Peckham	22.35	4.79	14.95	4.70	15.26	1.97	1.40	0.69	3.78	69.89
Camberwell	3.55	0.00	11.09	4.57	0.00	2.58	5.00	11.97	2.20	40.97
Nunhead	0.00	4.91	3.47	0.00	1.66	0.00	0.00	0.00	0.60	10.64
Zone 4 - Southwark South										
Lordship Lane	0.89	0.60	14.16	42.40	2.65	9.22	2.00	0.00	4.13	76.05
Herne Hill	0.00	0.00	3.57	1.96	1.49	0.37	4.80	10.13	1.23	23.55
Dulwich Village	4.00	0.00	0.79	11.61	2.49	1.60	7.81	0.00	1.58	29.87
LB Southwark Total	100.22	113.26	75.27	69.86	29.97	16.20	25.02	45.60	79.19	554.60
Central London/West End	38.40	16.41	14.24	39.43	39.23	23.45	32.23	115.50	6,691.77	7,010.68
Centres in LB Lambeth	12.88	0.00	3.07	7.30	10.61	2.34	64.66	46.75	228.85	376.46
Centres in LB Lewisham	4.59	0.72	0.00	0.65	28.03	26.07	0.80	0.00	93.30	154.16
Centres in LB Croydon	0.59	0.00	2.67	0.00	14.76	2.58	18.62	0.00	161.49	200.72
Centres in LB Bromley	0.00	0.36	0.50	6.52	5.64	19.68	35.03	0.00	210.83	278.55
Centres in RB Greenwich	0.00	0.00	0.30	0.00	0.83	0.00	0.00	0.00	116.26	117.39
Other Outside	6.51	26.70	16.74	7.83	38.48	32.83	25.02	25.79	1,715.66	1,895.57
Total Outside LB Southwark	62.97	44.19	37.51	61.74	137.58	106.95	176.36	188.04	9,218.17	10,033.52
TOTAL	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64	9,297.36	10,588.12

Source: Tables 6 and 9

Table 12: Food and Beverage Expenditure 2031 (£m) - With Commitments/Completions

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69		1,441.24
Zone 1 - Southwark North West										
Zone 1 - Commitments	20.73	58.35	16.07	0.96	1.13	0.00	1.07	4.45	16.45	119.20
Elephant & Castle / Walworth Road	2.02	0.60	7.07	0.00	0.00	0.00	0.44	1.80	2.81	14.75
Southwark/Bankside/Borough	9.83	16.98	0.00	0.41	0.93	0.00	0.22	0.77	7.20	36.33
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.16	4.33	0.10	0.05	0.17	0.00	0.10	0.49	0.81	6.21
London Bridge	13.20	4.25	2.63	0.00	0.38	0.27	1.34	9.91	34.34	66.33
Surrey Quays/Canada Water/Rotherhithe	1.61	35.19	0.84	0.82	2.07	0.00	0.90	6.00	8.84	56.26
The Blue	25.60	4.55	0.00	0.00	0.00	0.00	0.00	1.57	1.83	33.54
Old Kent Road	0.64	1.03	0.21	2.04	1.50	0.00	0.00	0.00	0.65	6.08
Zone 3 - Southwark Central										
Zone 3 - Commitments	1.72	0.81	2.04	0.58	1.10	0.23	0.40	0.83	0.41	8.13
Peckham	24.31	5.87	15.90	4.90	17.30	2.14	1.57	0.78	4.22	76.98
Camberwell	3.86	0.00	11.79	4.77	0.00	2.80	5.59	13.57	2.46	44.85
Nunhead	0.00	6.01	3.68	0.00	1.88	0.00	0.00	0.00	0.67	12.25
Zone 4 - Southwark South										
Lordship Lane	0.97	0.73	15.06	44.27	3.01	10.02	2.24	0.00	4.61	80.90
Herne Hill	0.00	0.00	3.79	2.04	1.69	0.40	5.37	11.48	1.38	26.15
Dulwich Village	4.35	0.00	0.84	12.12	2.82	1.74	8.73	0.00	1.76	32.36
LB Southwark Total	109.01	138.71	80.02	72.96	33.99	17.59	27.98	51.66	88.43	620.34
Central London/West End	41.77	20.09	15.14	41.18	44.48	25.47	36.04	130.86	7,471.90	7,826.93
Centres in LB Lambeth	14.01	0.00	3.26	7.63	12.03	2.54	72.29	52.96	255.53	420.25
Centres in LB Lewisham	4.99	0.88	0.00	0.68	31.78	28.31	0.90	0.00	104.18	171.72
Centres in LB Croydon	0.64	0.00	2.84	0.00	16.74	2.80	20.81	0.00	180.32	224.16
Centres in LB Bromley	0.00	0.44	0.53	6.81	6.39	21.37	39.16	0.00	235.40	310.11
Centres in RB Greenwich	0.00	0.00	0.32	0.00	0.94	0.00	0.00	0.00	129.81	131.07
Other Outside	7.08	32.70	17.79	8.17	43.63	35.66	27.97	29.22	1,915.68	2,117.91
Total Outside LB Southwark	68.50	54.11	39.88	64.48	155.99	116.16	197.17	213.04	10,292.82	11,202.15
TOTAL	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69	10,381.25	11,822.49

Source: Tables 6 and 9

Table 13: Food and Beverage Proposals Turnover/Trade Draw at 2026

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	19%	43%	16%	1%	1%	0%	1%	4%	15%	100%
Zone 2 - Commitments Trade Draw %	3%	65%	2%	1%	3%	0%	2%	9%	15%	100%
Zone 1 - Commitments Turnover £m	14.45	32.71	12.17	0.76	0.76	0.00	0.76	3.04	11.41	76.06
Zone 2 - Commitments Turnover £m	0.35	7.69	0.24	0.12	0.35	0.00	0.24	1.06	1.77	11.83

Source: LB Southwark (pre-application estimate)

(1) Net increase of 45,000 sq.m gross at Canada Water assumed 30% food & beverage. Sales density at 2026 = £5,634 per sq.m gross.

(2) Net increase of 7,000 sq.m gross at Aylesham Centre Peckham assumed 30% food & beverage. Sales density at 2026 = £5,634 per sq.m gross.

Table 14: Food and Beverage Expenditure 2026 (£m) - With Commitments/Completions and Proposals

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64		1,290.76
Zone 1 - Southwark North West										
Zone 1 - Commitments	17.55	37.57	13.66	0.91	0.99	0.00	0.95	3.86	14.71	90.20
Elephant & Castle / Walworth Road	1.71	0.39	6.01	0.00	0.00	0.00	0.40	1.56	2.51	12.58
Southwark/Bankside/Borough	8.32	10.93	0.00	0.39	0.82	0.00	0.20	0.67	6.44	27.76
Zone 2 - Southwark North East										
Zone 2 - Proposals	14.45	32.71	12.17	0.76	0.76	0.00	0.76	3.04	11.41	76.06
Zone 2 - Commitments	0.14	2.79	0.08	0.04	0.15	0.00	0.09	0.43	0.72	4.44
London Bridge	11.18	2.74	2.24	0.00	0.33	0.25	1.20	8.60	30.71	57.23
Surrey Quays/Canada Water/Rotherhithe	1.25	16.58	0.64	0.77	1.80	0.00	0.79	5.11	7.89	34.84
The Blue	21.67	2.93	0.00	0.00	0.00	0.00	0.00	1.36	1.63	27.59
Old Kent Road	0.55	0.66	0.18	1.94	1.32	0.00	0.00	0.00	0.59	5.23
Zone 3 - Southwark Central										
Zone 2 - Proposals	0.35	7.69	0.24	0.12	0.35	0.00	0.24	1.06	1.77	11.83
Zone 3 - Commitments	1.46	0.52	1.73	0.55	0.97	0.21	0.36	0.72	0.37	6.89
Peckham	18.81	2.76	12.07	4.64	15.07	1.97	1.39	0.67	3.77	61.14
Camberwell	3.27	0.00	10.02	4.54	0.00	2.58	4.98	11.77	2.20	39.36
Nunhead	0.00	3.87	3.13	0.00	1.65	0.00	0.00	0.00	0.60	9.25
Zone 4 - Southwark South										
Lordship Lane	0.82	0.47	12.79	42.12	2.64	9.22	1.99	0.00	4.12	74.18
Herne Hill	0.00	0.00	3.22	1.94	1.48	0.37	4.78	9.96	1.23	22.99
Dulwich Village	3.68	0.00	0.72	11.54	2.47	1.60	7.77	0.00	1.58	29.35
LB Southwark Total	105.20	122.61	78.89	70.26	30.81	16.20	25.89	48.82	92.25	590.92
Central London/West End	35.36	12.94	12.87	39.18	38.99	23.45	32.08	113.52	6,682.30	6,990.69
Centres in LB Lambeth	11.86	0.00	2.77	7.26	10.55	2.34	64.34	45.95	228.53	373.59
Centres in LB Lewisham	4.23	0.57	0.00	0.65	27.86	26.07	0.80	0.00	93.17	153.34
Centres in LB Croydon	0.55	0.00	2.42	0.00	14.67	2.58	18.53	0.00	161.26	200.00
Centres in LB Bromley	0.00	0.28	0.45	6.48	5.60	19.68	34.86	0.00	210.53	277.88
Centres in RB Greenwich	0.00	0.00	0.27	0.00	0.82	0.00	0.00	0.00	116.09	117.19
Other Outside	6.00	21.05	15.12	7.78	38.25	32.83	24.90	25.35	1,713.23	1,884.51
Total Outside LB Southwark	57.99	34.84	33.89	61.34	136.75	106.95	175.50	184.82	9,205.11	9,997.20
TOTAL	163.19	157.44	112.79	131.60	167.56	123.15	201.39	233.64	9,297.36	10,588.12

Source: Tables 6 and 9

Table 15: Food and Beverage Expenditure 2031 (£m) - With Commitments/Completions and Proposals

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69		1,441.24
Zone 1 - Southwark North West										
Zone 1 - Commitments	19.09	46.01	14.52	0.95	1.13	0.00	1.06	4.37	16.42	103.55
Elephant & Castle / Walworth Road	1.86	0.48	6.39	0.00	0.00	0.00	0.44	1.77	2.80	13.74
Southwark/Bankside/Borough	9.05	13.39	0.00	0.40	0.92	0.00	0.22	0.76	7.19	31.93
Zone 2 - Southwark North East										
Zone 2 - Proposals	15.72	40.06	12.94	0.79	0.86	0.00	0.85	3.45	12.74	87.40
Zone 2 - Commitments	0.15	3.42	0.09	0.05	0.17	0.00	0.10	0.48	0.81	5.26
London Bridge	12.16	3.35	2.38	0.00	0.37	0.27	1.34	9.74	34.29	63.90
Surrey Quays/Canada Water/Rotherhithe	1.36	20.31	0.68	0.81	2.04	0.00	0.89	5.79	8.81	40.68
The Blue	23.57	3.58	0.00	0.00	0.00	0.00	0.00	1.54	1.83	30.52
Old Kent Road	0.59	0.81	0.19	2.03	1.50	0.00	0.00	0.00	0.65	5.77
Zone 3 - Southwark Central										
Zone 2 - Proposals	0.39	9.42	0.25	0.12	0.40	0.00	0.26	1.21	1.98	14.03
Zone 3 - Commitments	1.58	0.64	1.84	0.57	1.10	0.23	0.40	0.82	0.41	7.60
Peckham	20.46	3.38	12.83	4.84	17.09	2.14	1.55	0.76	4.21	67.26
Camberwell	3.56	0.00	10.65	4.74	0.00	2.80	5.57	13.33	2.46	43.11
Nunhead	0.00	4.74	3.33	0.00	1.87	0.00	0.00	0.00	0.67	10.61
Zone 4 - Southwark South										
Lordship Lane	0.89	0.58	13.60	43.99	2.99	10.02	2.23	0.00	4.60	78.90
Herne Hill	0.00	0.00	3.42	2.03	1.68	0.40	5.34	11.28	1.37	25.54
Dulwich Village	4.00	0.00	0.76	12.05	2.80	1.74	8.69	0.00	1.76	31.79
LB Southwark Total	114.43	150.16	83.87	73.37	34.93	17.59	28.94	55.31	103.00	661.61
Central London/West End	38.46	15.84	13.68	40.92	44.21	25.47	35.86	128.61	7,461.32	7,804.38
Centres in LB Lambeth	12.90	0.00	2.95	7.58	11.96	2.54	71.93	52.05	255.17	417.08
Centres in LB Lewisham	4.60	0.69	0.00	0.68	31.59	28.31	0.89	0.00	104.03	170.79
Centres in LB Croydon	0.59	0.00	2.57	0.00	16.63	2.80	20.71	0.00	180.06	223.37
Centres in LB Bromley	0.00	0.35	0.48	6.77	6.35	21.37	38.97	0.00	235.07	309.36
Centres in RB Greenwich	0.00	0.00	0.29	0.00	0.93	0.00	0.00	0.00	129.63	130.85
Other Outside	6.52	25.78	16.08	8.12	43.36	35.66	27.84	28.72	1,912.96	2,105.05
Total Outside LB Southwark	63.07	42.67	36.03	64.06	155.05	116.16	196.20	209.38	10,278.25	11,160.88
TOTAL	177.51	192.83	119.90	137.44	189.98	133.75	225.14	264.69	10,381.25	11,822.49

Source: Tables 6 and 9

Table 16: Summary of Food and Beverage 2014 to 2031 - With Commitments

	2014	2021	2026	2031
Available Expenditure in LB Southwark (£m)				
Zone 1 - Southwark North West	41.34	125.62	148.28	170.29
Zone 2 - Southwark North East	105.08	126.85	147.98	168.43
Zone 3 - Southwark Central	94.57	108.03	128.86	142.21
Zone 4 - Southwark South	106.22	119.55	129.47	139.42
Total	347.21	480.06	554.60	620.34
Turnover of Existing Facilities (£m)				
Zone 1 - Southwark North West	41.34	44.32	46.58	48.96
Zone 2 - Southwark North East	105.08	112.66	118.41	124.45
Zone 3 - Southwark Central	94.57	101.39	106.56	112.00
Zone 4 - Southwark South	106.22	113.88	119.69	125.79
Total	347.21	372.25	391.24	411.20
Turnover of Commitments (£m)				
Zone 1 - Southwark North West	0.00	87.14	91.59	96.26
Zone 2 - Southwark North East	0.00	4.28	4.50	4.73
Zone 3 - Southwark Central	0.00	6.54	6.87	7.22
Zone 4 - Southwark South	0.00	0.00	0.00	0.00
Total	0.00	97.96	102.96	108.21
Surplus/Deficit Expenditure (£m)				
Zone 1 - Southwark North West	n/a	-5.84	10.12	25.07
Zone 2 - Southwark North East	n/a	9.91	25.08	39.25
Zone 3 - Southwark Central	n/a	0.10	15.43	22.99
Zone 4 - Southwark South	n/a	5.67	9.79	13.62
Total	n/a	9.84	60.40	100.93

Source: Tables 10 to 12

Table 17: Food and Beverage Capacity 2014 to 2031 - over and above commitments

	2014	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)				
Zone 1 - Southwark North West	n/a	-1,089	1,795	4,234
Zone 2 - Southwark North East	n/a	1,849	4,451	6,628
Zone 3 - Southwark Central	n/a	19	2,738	3,883
Zone 4 - Southwark South	n/a	1,057	1,737	2,301
Total	n/a	1,836	10,721	17,045

Table 18: Summary of Food and Beverage 2014 to 2031 - With Commitments and Proposals

	2014	2021	2026	2031
Available Expenditure in LB Southwark (£m)				
Zone 1 - Southwark North West	41.34	125.62	130.53	149.22
Zone 2 - Southwark North East	105.08	126.85	205.40	233.54
Zone 3 - Southwark Central	94.57	108.03	128.47	142.61
Zone 4 - Southwark South	106.22	119.55	126.52	136.23
Total	347.21	480.06	590.92	661.61
Turnover of Existing Facilities (£m)				
Zone 1 - Southwark North West	41.34	44.32	46.58	48.96
Zone 2 - Southwark North East	105.08	112.66	118.41	124.45
Zone 3 - Southwark Central	94.57	101.39	106.56	112.00
Zone 4 - Southwark South	106.22	113.88	119.69	125.79
Total	347.21	372.25	391.24	411.20
Turnover of Commitments/Proposals (£m)				
Zone 1 - Southwark North West	0.00	87.14	91.59	96.26
Zone 2 - Southwark North East	0.00	4.28	80.56	84.67
Zone 3 - Southwark Central	0.00	6.54	18.70	19.66
Zone 4 - Southwark South	0.00	0.00	0.00	0.00
Total	0.00	97.96	190.85	200.58
Surplus/Deficit Expenditure (£m)				
Zone 1 - Southwark North West	n/a	-5.84	-7.64	4.01
Zone 2 - Southwark North East	n/a	9.91	6.43	24.43
Zone 3 - Southwark Central	n/a	0.10	3.21	10.95
Zone 4 - Southwark South	n/a	5.67	6.83	10.44
Total	n/a	9.84	8.83	49.83

Source: Tables 10 to 15

Table 19: Food and Beverage Capacity 2014 to 2031 - over and above commitments and proposals

	2014	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)				
Zone 1 - Southwark North West	n/a	-1,089	-1,356	677
Zone 2 - Southwark North East	n/a	1,849	1,142	4,125
Zone 3 - Southwark Central	n/a	19	569	1,850
Zone 4 - Southwark South	n/a	1,057	1,212	1,763
Total	n/a	1,836	1,568	8,415

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