

Total site area (ha)	45.46	PTAL Score	4
Undeveloped land (ha)	45.46	Site status	Undesignated

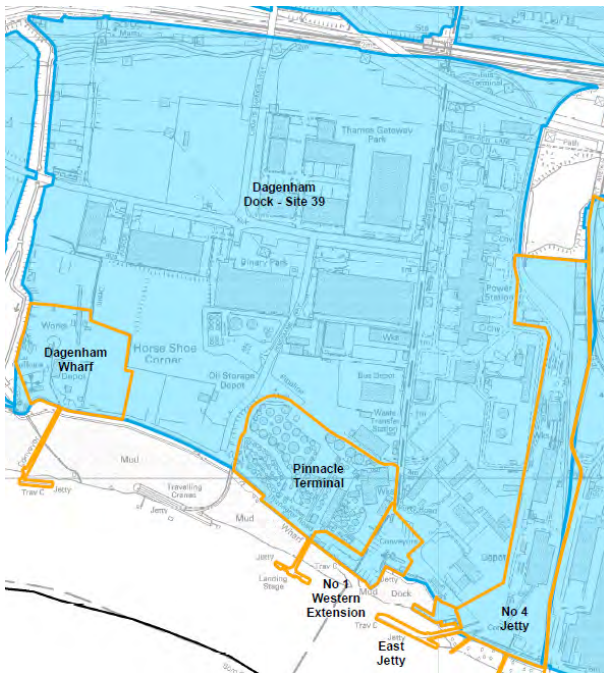
Criteria	Comment	Score (out of 5)
Strategic access		4
Local accessibility (local road access and public transport)		3
Proximity to urban areas and access to labour & services		2
Compatibility of adjoining uses		4
Development and environmental constraints		3
Market attractiveness		

Total Score: **16**

Planning factors	Key Regeneration Areas: Barking Riverside. Site Specific Allocations outside Barking Town Centre: Barking Riverside. ELT, ELT Temporary
Barriers to delivery	No obvious barriers aside from existing masterplan for housing
Potential uses	B1, B2, B8.
Timescale/availability	Short to medium term
General comment	This large brownfield site which has been cleared and remediated is a component part of the Barking Riverside development that has been marked for large scale housing development. It is located approximately 1.5km from the A13, despite being remote from Dagenham town centre, there is an increasing amount of residential land uses in the vicinity, bus linkages are good and includes East London Transit. The site adjoins the River Thames and flood prevention measures may need to be incorporated into new development. In terms of planning policy, it is designated as a key regeneration area and is subject to a site specific allocation: Barking Riverside. In conclusion, while this site is suited to employment uses, it is likely to be developed as mixed use,

predominantly housing with some supplementary employment uses. However, this site could be suited to employment uses in the interim period.

[Scoring: 5 = best, 1 = worst]



Total site area (ha)	130.46	PTAL Score	2
Undeveloped land (ha)	43.14	Site status	SIL

Criteria	Score (out of 5)
Strategic access	4
Local accessibility (local road access and public transport)	4
Proximity to urban areas and access to labour & services	3
Compatibility of adjoining uses	4
Development and environmental constraints	3
Market attractiveness	4

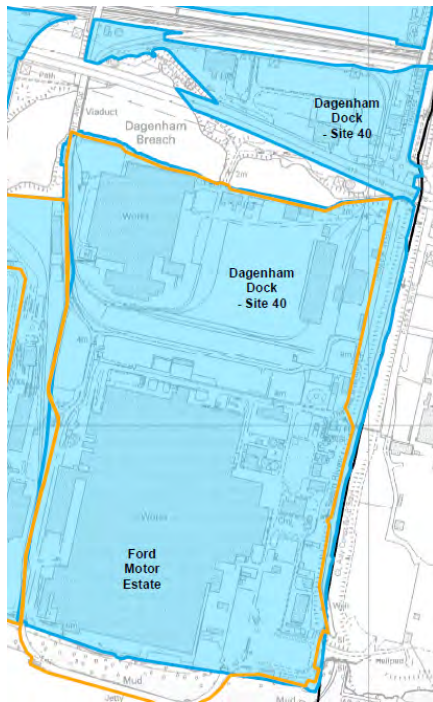
Total Score: **22**

Planning factors	Five wharves on-site: Dagenham Wharf (retain), Pinnacle Terminal (retain), No.1 Western Extension (retain), East Jetty (retain) and No.4 Jetty (retain). Joint Waste Plan Site Allocation. Strategic Industrial Locations: Dagenham Dock. Covered by Draft Employment Areas LDO. ELT. Planning permission was granted for an 18,296 sq.m. industrial building and stack to be used as a combined heat and power facility (10/00287/FUL). Existing change of use planning application (11/00003/FUL).
Barriers to delivery	Existing vision for the site, remediation works may be required.
Potential uses	B1, B2, B8.
Timescale/availability	Short to medium term
General comment	This is the largest single site that is designated in the Borough. It has been the focus of large scale infrastructure investment that will help to facilitate development. The former brownfield site is situated between the A13 and the River Thames to the south of Dagenham. It has been partially cleared and redeveloped. The site comprises of predominantly warehouse and distribution units with B1, B2 and B8 uses. Access to the strategic road network (A13) is just over 1 from the site and Choats Road dissects the site. Dagenham Dock train station is in close proximity to the site and it is served by East London

Transit, despite this the site is removed from the urban area and local shops and services.

The site includes; London Sustainable Industries Park a focus of London's Green Enterprise District that supports cleantech, environmental industries and technologies; Thames Gateway Park development which is partially complete and occupied and has outline planning consent for additional B1c, B2 or B8 units; an oil storage depot which is likely to be expanded in the future and Barking Reach Power station. The site benefits from a number of safeguarded onsite wharves which accommodate water based freight. Planning permission was also granted for an 18,296 sq.m. industrial building and stack to be used as a combined heat and power facility (10/00287/FUL). Of note, although the site is currently compatible with adjoining uses, the adjacent site has been earmarked for residential development as part of 'Barking Riverside'. There is further scope for redevelopment onsite, however remediation works may be required and it is a component part of the GLA's London Riverside Opportunity Area. To summarise, this is a suitable employment site that is currently the subject of comprehensive redevelopment.

[Scoring: 5 = best, 1 = worst]



Total site area (ha)	84.35	PTAL Score	1a
Undeveloped land (ha)	N/A	Site status	SIL

Criteria	Comment	Score (out of 5)
Strategic access		3
Local accessibility (local road access and public transport)		2
Proximity to urban areas and access to labour & services		2
Compatibility of adjoining uses		4
Development and environmental constraints		4
Market attractiveness		4

Total Score: 19

Planning factors	Ford Motor Estate Wharf on-site (retain). SIL: Fords. Covered by Draft Employment Areas LDO.
Barriers to delivery	Existing use, in need of remediation prior to re-development
Potential uses	B1, B2, B8.
Timescale/availability	Medium to long term
General comment	This site borders London Borough of Havering to the east and the River Thames provides a natural border to the south. It is a prominent, self-contained, single user site that is currently occupied by Ford for manufacturing uses. The northern part of the site is separated from the Ford manufacturing plant by Dagenham Breach and the A13 and is currently in use for open storage and distribution, it has a dedicated on-site rail link. The site also has a safeguarded wharf. Its location is remote from the town centre, local shops and services and public transport provision serving the site is limited to a local bus service. There is a single access route that links to the A13. Remediation works would be required as part of a redevelopment. In terms of planning factors, it is a component part of the GLA's Draft London

	Riverside Opportunity Area Planning Framework which recommends partial intensification and redevelopment. Overall, this site is less well served in terms of local access, but has a dedicated on-site wharf and rail-link thereby improving its relative advantage.
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[Scoring: 5 = best, 1 = worst]

Appendix 16 Definition of B Class Sectors

Definition of B Class Sectors

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities		86%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	42%	0%
Wholesale	0%	13%	87%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	69%
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	17%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Appendix 17 Experian Baseline Forecasts

Experian Baseline Forecasts

Experian Sector	Workforce Jobs			
	2013	2032	Change 2013-2032	% Change 2013-2032
Agriculture, Forestry & Fishing	0	0	0	0.0
Extraction & Mining	10	10	0	0.0
Food, Drink & Tobacco	620	600	-20	-3.2
Textiles & Clothing	130	40	-90	-69.2
Wood & Paper	100	80	-20	-20.0
Printing and Recorded Media	170	150	-20	-11.8
Fuel Refining	0	0	0	0.0
Chemicals	10	0	-10	-100.0
Pharmaceuticals	300	220	-80	-26.7
Non-Metallic Products	420	230	-190	-45.2
Metal Products	630	420	-210	-33.3
Computer & Electronic Products	10	20	10	100.0
Machinery & Equipment	20	10	-10	-50.0
Transport Equipment	3,170	2,980	-190	-6.0
Other Manufacturing	330	300	-30	-9.1
Utilities	760	830	70	9.2
Construction of Buildings	1,320	1,900	580	43.9
Civil Engineering	380	500	120	31.6
Specialised Construction Activities	2,880	3,400	520	18.1
Wholesale	5,380	5,930	550	10.2
Retail	4,490	5,160	670	14.9
Accommodation & Food Services	4,300	5,790	1,490	34.7
Land Transport, Storage & Post	10	1,510	1,500	15000.0
Air & Water Transport	1,860	2,500	640	34.4
Recreation	2,160	2,510	350	16.2
Media Activities	70	80	10	14.3
Telecoms	80	80	0	0.0
Computing & Information Services	970	1,260	290	29.9
Finance	1,010	1,330	320	31.7
Insurance & Pensions	20	20	0	0.0
Real Estate	900	1,480	580	64.4
Professional Services	1,390	1,880	490	35.3
Administrative & Supportive Services	5,960	7,910	1,950	32.7
Other Private Services	1,120	1,320	200	17.9
Public Administration & Defence	2,520	2,000	-520	-20.6
Education	6,050	7,530	1,480	24.5
Health	2,140	2,630	490	22.9
Residential Care & Social Work	3,220	4,210	990	30.7
Total	55,180	65,815	10,635	19.3

Source: Experian (December 2013 Quarterly Release)

Note: Experian projections only cover the period to 2031, therefore employment figures were extrapolated by NLP to 2032 on a pro-rata basis

Appendix 18 Convenience Assessment

Table 1: Population

Total Population	2011	2013	2017	2022	2027	2032
Zone 1 - Barking	59,436	66,267	79,697	94,079	103,150	109,550
Zone 2 - Dagenham	63,923	64,588	65,801	66,405	68,503	70,780
Zone 3 - Green Lane/Chadwell Heath	63,670	65,003	67,191	68,477	69,357	70,770
Zone 4 - Havering West	41,087	43,560	48,755	54,947	57,926	58,473
Zone 5 - Redbridge South	72,856	74,624	78,237	81,711	83,563	84,985
Zone 6 - Newham East	92,705	95,459	100,062	103,154	106,664	109,537
Total	393,677	409,501	439,743	468,773	489,163	504,095

Source: GLA 2012 Round of Demographic Projections - SHLAA-based ward projections

Table 2: Convenience Goods Expenditure per person (£)

Convenience Goods Expenditure per person (£)	2013	2017	2022	2027	2032
Zone 1 - Barking	1,494	1,500	1,541	1,595	1,653
Zone 2 - Dagenham	1,542	1,548	1,591	1,647	1,706
Zone 3 - Green Lane/Chadwell Heath	1,540	1,546	1,589	1,645	1,704
Zone 4 - Havering West	1,698	1,705	1,752	1,813	1,879
Zone 5 - Redbridge South	1,602	1,608	1,652	1,711	1,773
Zone 6 - Newham East	1,434	1,440	1,479	1,532	1,587

Source: Experian 2011

Notes:

Data in 2011 prices

Growth Rates: -0.6% 2011-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Total Convenience Goods Expenditure (£m)	2013	2017	2022	2027	2032
Zone 1 - Barking	99.00	119.55	144.98	164.52	181.09
Zone 2 - Dagenham	99.59	101.86	105.65	112.82	120.75
Zone 3 - Green Lane/Chadwell Heath	100.10	103.88	108.81	114.09	120.59
Zone 4 - Havering West	73.96	83.13	96.27	105.02	109.87
Zone 5 - Redbridge South	119.55	125.81	134.99	142.98	150.68
Zone 6 - Newham East	136.89	144.09	152.56	163.41	173.84
Total	629.10	678.30	743.25	802.85	856.81

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey, October 2013

Table 5: Base Year 2013 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2013	99.00	99.59	100.10	73.96	119.55	136.89		629.10
Asda, Vicarage Field Shopping Centre, Barking	26.04	1.10	0.50	0.30	3.47	2.33	1.77	35.50
Tesco Superstore, Highbridge Road, Barking	7.82	0.10	0.80	0.00	2.99	11.22	1.21	24.14
Other stores, Barking	7.72	0.90	0.20	0.15	2.03	0.41	0.60	12.01
Asda, Merriellands Crescent, Dagenham	12.87	33.46	11.51	5.77	0.72	0.27	3.40	68.01
Other Zone 1	16.93	5.18	1.60	1.70	3.83	4.79	1.79	35.82
Iceland/Lidl, Dagenham, Heathway	0.50	9.16	2.40	0.00	0.00	0.00	0.63	12.69
Tesco Express, Dagenham Heathway	0.00	4.18	0.50	0.00	0.00	0.55	0.28	5.51
Other Zone 2	1.98	13.15	8.81	0.00	2.87	0.00	1.41	28.22
Sainsbury's, High Street, Chadwell Heath	0.00	2.99	6.51	0.30	11.84	0.00	1.14	22.76
Tesco Express, Chadwell Heath	0.59	0.30	0.90	0.00	4.06	0.27	0.32	6.45
Other Chadwell Heath	0.00	0.00	0.20	0.00	2.39	0.00	0.14	2.73
Green Lane	0.40	0.20	3.20	0.44	6.69	0.55	0.60	12.09
Morrisons, Becontree Heath	1.49	4.48	19.82	0.74	2.63	0.00	1.53	30.69
Other Zone 3	0.30	1.00	9.01	0.00	0.24	0.00	0.55	11.10
LBBB Total	76.63	76.19	65.97	9.39	43.75	20.40	15.39	307.72
Beckton	11.68	2.09	0.80	0.00	3.95	48.32	n/a	66.84
East Ham	0.30	0.00	0.00	0.00	0.48	34.09	n/a	34.86
Ilford	1.58	0.70	0.80	0.30	22.24	10.68	n/a	36.29
Romford	1.19	8.37	21.82	9.17	21.88	0.27	n/a	62.70
Homchurch	0.99	1.29	3.10	22.34	0.36	0.14	n/a	28.22
Rainham	0.69	7.07	3.20	24.19	0.00	0.00	n/a	35.15
Lakeside	1.29	0.50	0.10	0.30	0.36	0.27	n/a	2.81
Stratford	0.00	0.00	0.00	0.00	0.00	1.92	n/a	1.92
Other Outside LBBB	4.65	3.39	4.30	8.28	26.54	20.81	n/a	67.97
Total	99.00	99.59	100.10	73.96	119.55	136.89	n/a	644.49

Table 6: Future Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	44.7%	5.4%	2.4%	2.0%	10.4%	13.8%	5.0%
Dagenham	16.1%	57.5%	29.2%	11.6%	4.6%	1.5%	5.0%
Chadwell Heath	0.6%	3.3%	7.0%	0.3%	13.8%	0.5%	5.0%
Green Lane	5.2%	9.9%	38.4%	3.9%	10.0%	0.3%	5.0%
Barking Riverside*	15.0%	8.0%	0.0%	0.0%	0.0%	0.0%	5.0%
LBBB Total	81.6%	84.1%	77.0%	17.8%	38.8%	16.1%	
Outside LBBB	18.4%	15.9%	23.0%	82.2%	61.2%	83.9%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, October 2013 - NLP adjustments to reflect commitments

Table 7: Future Convenience Goods Expenditure 2017 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2017	119.55	101.86	103.88	83.13	125.81	144.09		678.30
Barking	53.44	5.50	2.49	1.66	13.08	19.88	5.06	101.12
Dagenham	19.25	58.57	30.33	9.64	5.79	2.16	6.62	132.36
Chadwell Heath	0.72	3.36	7.27	0.25	17.36	0.72	1.56	31.24
Green Lane	6.22	10.08	39.89	3.24	12.58	0.43	3.81	76.26
Barking Riverside	17.93	8.15	0.00	0.00	0.00	0.00	1.37	27.45
LBBB Total	97.55	85.66	79.99	14.80	48.81	23.20	18.42	368.43
Outside LBBB	22.00	16.20	23.89	68.33	76.99	120.89	n/a	328.30
Total	119.55	101.86	103.88	83.13	125.81	144.09	n/a	696.73

Table 8: Future Convenience Goods Expenditure 2022 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2022	144.98	105.65	108.81	96.27	134.99	152.56		743.25
Barking	64.80	5.71	2.61	1.93	14.04	21.05	5.80	115.94
Dagenham	23.34	60.75	31.77	11.17	6.21	2.29	7.13	142.66
Chadwell Heath	0.87	3.49	7.62	0.29	18.63	0.76	1.67	33.32
Green Lane	7.54	10.46	41.78	3.75	13.50	0.46	4.08	81.57
Barking Riverside	21.75	8.45	0.00	0.00	0.00	0.00	1.59	31.79
LBBB Total	118.30	88.85	83.78	17.14	52.37	24.56	20.26	405.27
Outside LBBB	26.68	16.80	25.03	79.13	82.61	128.00	n/a	358.25
Total	144.98	105.65	108.81	96.27	134.99	152.56	n/a	763.52

Table 9: Future Convenience Goods Expenditure 2027 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2027	164.52	112.82	114.09	105.02	142.98	163.41		802.85
Barking	73.54	6.09	2.74	2.10	14.87	22.55	6.42	128.31
Dagenham	26.49	64.87	33.31	12.18	6.58	2.45	7.68	153.57
Chadwell Heath	0.99	3.72	7.99	0.32	19.73	0.82	1.77	35.33
Green Lane	8.56	11.17	43.81	4.10	14.30	0.49	4.34	86.76
Barking Riverside	24.68	9.03	0.00	0.00	0.00	0.00	1.77	35.48
LBBB Total	134.25	94.89	87.85	18.69	55.47	26.31	21.97	439.44
Outside LBBB	30.27	17.94	26.24	86.33	87.50	137.10	n/a	385.38
Total	164.52	112.82	114.09	105.02	142.98	163.41	n/a	824.82

Table 10: Future Convenience Goods Expenditure 2032 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2032	181.09	120.75	120.59	109.87	150.68	173.84		856.81
Barking	80.95	6.52	2.89	2.20	15.67	23.99	6.96	139.18
Dagenham	29.15	69.43	35.21	12.75	6.93	2.61	8.21	164.30
Chadwell Heath	1.09	3.98	8.44	0.33	20.79	0.87	1.87	37.37
Green Lane	9.42	11.95	46.31	4.28	15.07	0.52	4.61	92.16
Barking Riverside	27.16	9.66	0.00	0.00	0.00	0.00	1.94	38.76
LBBB Total	147.77	101.55	92.86	19.56	58.46	27.99	23.59	471.77
Outside LBBB	33.32	19.20	27.74	90.31	92.22	145.85	n/a	408.63
Total	181.09	120.75	120.59	109.87	150.68	173.84	n/a	880.40

Table 11: Convenience Goods Floorspace and Benchmark Turnover, 2013**Table 11: Convenience Goods Floorspace and Benchmark Turnover, 2013**

Centre/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
ZONE 1					
Barking					
Asda, Vicarage Field Shopping Centre, Barking	2,335	80%	1,868	£12,922	£24.14
Tesco Superstore, Highbridge Road, Barking	2,919	80%	2,335	£10,670	£24.92
Iceland, 34/42 East Street, Barking	527	95%	501	£7,025	£3.52
Lidl, 62-82 Ripple Road, Barking	929	95%	883	£3,022	£2.67
Tesco Ripple Road Express, Barking	176	95%	167	£10,670	£1.78
Tesco Longbridge Road Barking Express	200	95%	190	£10,670	£2.03
Other Barking Town Centre Shops	2,779	100%	2,779	£5,000	£13.90
Barking Total	9,865		8,723		£72.95
Asda, Merriellands Crescent, Dagenham	5,806	75%	4,355	£12,922	£56.27
Other Zone 1	3,300	100%	3,300	£5,000	£16.50
ZONE 1 TOTAL	18,971		16,377		£145.71
ZONE 2					
Dagenham Heathway					
Iceland/Lidl, 258-262 Heathway, Dagenham Heathway	804	95%	764	£5,000	£3.82
Tesco Express, Dagenham Heathway	200	95%	190	£10,670	£2.03
Other Dagenham Heathway	1,138	100%	1,138	£5,000	£5.69
Dagenham Heathway Total	2,142		2,092		£11.54
Other Zone 2	2,200	100%	2,200	£5,000	£11.00
ZONE 2 TOTAL	4,342		4,292		£22.54
ZONE 3					
Chadwell Heath					
Sainsbury's, High Street, Chadwell Heath	2,562	85%	2,178	£13,115	£28.56
Tesco Express, Chadwell Heath	246	95%	234	£10,670	£2.49
Other Chadwell Heath	861	100%	861	£5,000	£4.31
Chadwell Heath Total	3,669		3,272		£35.36
Green Lane					
Co-op, 691 Green Lane	527	95%	501	£7,378	£3.69
Tesco Express, Green Lane	291	95%	276	£10,670	£2.95
Other Green Lane	1,568	100%	1,568	£5,000	£7.84
Green Lane Total	2,386		2,345		£14.48
Morrisons, Becontree Heath	2,634	85%	2,239	£12,181	£27.27
Other Zone 3	2,850	100%	2,850	£5,000	£14.25
ZONE 3 TOTAL	11,539		10,706		£91.36
LBBB TOTAL	34,852		31,375		£259.62
Commitments					
Asda, Whalebone Lane	2,713	60%	1,628	£12,922	£21.03
Asda, London Road	3,716	60%	2,230	£12,922	£28.81
Sanofi Aventis site	6,958	75%	5,219	£13,115	£68.44
Barking Riverside	8,800	45%	3,960	£12,000	£47.52
Morrisons extension, Becontree Heath	1,443	75%	1,082	£12,181	£13.18
Total	23,630		14,118		£178.99

Source: IGD, Goad and LBBB

Sources: IGD, Goad, VOA and LBBB

Table 12: Summary of Convenience Goods Expenditure Capacity 2013 to 2032

Centre	2013	2017	2022	2027	2032
Available Expenditure in LBBB (£m)					
Barking	107.47	101.12	115.94	128.31	139.18
Dagenham	114.42	132.36	142.66	153.57	164.30
Chadwell Heath	31.95	31.24	33.32	35.33	37.37
Green Lane	53.88	76.26	81.57	86.76	92.16
Barking Riverside	n/a	27.45	31.79	35.48	38.76
Total	307.72	368.43	405.27	439.44	471.77
Turnover of Existing Facilities (£m)					
Barking	89.45	89.45	89.45	89.45	89.45
Dagenham	78.81	78.81	78.81	78.81	78.81
Chadwell Heath	35.36	35.36	35.36	35.36	35.36
Green Lane	56.01	56.01	56.01	56.01	56.01
Barking Riverside	n/a	n/a	n/a	n/a	n/a
Total	259.62	259.62	259.62	259.62	259.62
Turnover of Commitments (£m)					
Barking	n/a	4.67	4.67	4.67	4.67
Dagenham	n/a	68.44	68.44	68.44	68.44
Chadwell Heath	n/a	0.00	0.00	0.00	0.00
Green Lane	n/a	34.22	34.22	34.22	34.22
Barking Riverside	n/a	47.52	47.52	47.52	47.52
Total	n/a	154.85	154.85	154.85	154.85
Surplus/Defecit Expenditure (£m)					
Barking	18.02	7.00	21.82	34.19	45.06
Dagenham	35.62	-14.89	-4.59	6.32	17.05
Chadwell Heath	-3.41	-4.12	-2.04	-0.03	2.01
Green Lane	-2.13	-13.97	-8.65	-3.47	1.94
Barking Riverside	n/a	-20.07	-15.73	-12.04	-8.76
Total	48.10	-46.04	-9.19	24.97	57.30

Source: Tables 5 - 11

Table 13: Convenience Goods Floorspace Capacity 2013 to 2032

Centre	2013	2017	2022	2027	2032
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Barking	1,387	538	1,678	2,630	3,466
Dagenham	2,740	-1,145	-353	486	1,312
Chadwell Heath	-263	-317	-157	-3	155
Green Lane	-164	-1,074	-666	-267	149
Barking Riverside	n/a	-1,544	-1,210	-926	-674
Total	3,700	-3,541	-707	1,921	4,408
Floorspace Requirement (sq.m gross)					
Barking	1,981	769	2,398	3,757	4,951
Dagenham	3,914	-1,636	-504	695	1,874
Chadwell Heath	-375	-452	-224	-4	221
Green Lane	-234	-1,535	-951	-381	213
Barking Riverside	n/a	-2,205	-1,729	-1,323	-963
Total	5,286	-5,059	-1,010	2,744	6,297

Appendix 19 Comparison Assessment

Table 1: Population

Zone	2011	2013	2017	2022	2027	2032
Zone 1 - Barking	59,436	66,267	79,697	94,079	103,150	109,550
Zone 2 - Dagenham	63,923	64,588	65,801	66,405	68,503	70,780
Zone 3 - Green Lane/Chadwell Heath	63,670	65,003	67,191	68,477	69,357	70,770
Zone 4 - Havering West	41,087	43,560	48,755	54,947	57,926	58,473
Zone 5 - Redbridge South	72,856	74,624	78,237	81,711	83,563	84,985
Zone 6 - Newham East	92,705	95,459	100,062	103,154	106,664	109,537
Total	393,677	409,501	439,743	468,773	489,163	504,095

Source: GLA 2012 Round of Demographic Projections - SHLAA-based ward projections

Table 2: Comparison Goods Expenditure per person (£)

Zone	2013	2017	2022	2027	2032
Zone 1 - Barking	1,981	2,131	2,399	2,764	3,189
Zone 2 - Dagenham	1,979	2,129	2,397	2,762	3,186
Zone 3 - Green Lane/Chadwell Heath	2,039	2,194	2,469	2,845	3,282
Zone 4 - Havering West	2,519	2,710	3,051	3,515	4,056
Zone 5 - Redbridge South	2,138	2,301	2,590	2,984	3,443
Zone 6 - Newham East	1,994	2,146	2,415	2,783	3,211

Source: Experian 2011

Notes:

Data in 2011 prices

Growth Rates: 3.1% 2011-2012, 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2013	2017	2022	2027	2032
Zone 1 - Barking	131.27	169.83	225.70	285.11	349.35
Zone 2 - Dagenham	127.82	140.09	159.17	189.21	225.51
Zone 3 - Green Lane/Chadwell Heath	132.54	147.42	169.07	197.32	232.27
Zone 4 - Havering West	109.73	132.13	167.64	203.61	237.17
Zone 5 - Redbridge South	159.55	180.02	211.63	249.35	292.60
Zone 6 - Newham East	190.35	214.73	249.12	296.85	351.72
Total	851.25	984.22	1,182.33	1,421.44	1,688.62

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey, October 2013

Table 5: Base Year 2013 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2013	131.27	127.82	132.54	109.73	159.55	190.35		851.25
Barking (incl. Abbey Retail Park)	30.46	4.86	2.25	0.55	6.54	9.52	6.02	60.19
Dagenham Heathway (incl. Merrielands RP)	7.09	33.11	10.87	3.40	1.76	0.57	6.31	63.10
Chadwell Heath	0.66	2.56	6.23	0.11	11.17	0.57	1.12	22.41
Green Lane	0.39	1.15	2.52	0.00	0.48	0.19	0.25	4.98
LBBB Total	38.59	41.67	21.87	4.06	19.94	10.85	13.70	150.69
Central London	4.46	1.53	3.98	2.96	4.15	13.13	n/a	30.22
Westfield, Stratford	5.25	1.79	2.12	0.22	9.41	21.13	n/a	39.92
Lakeside	24.15	25.05	23.19	35.55	12.13	12.94	n/a	133.02
Bluewater	1.44	0.38	1.72	2.30	3.67	1.33	n/a	10.86
East Ham	1.84	0.64	0.40	0.00	0.32	34.45	n/a	37.65
Romford	16.02	37.83	61.37	42.14	33.19	8.95	n/a	199.48
Ilford	10.76	3.71	5.57	0.00	51.69	21.89	n/a	93.62
Beckton	24.29	6.65	4.24	0.66	11.49	55.58	n/a	102.90
Rainham	0.39	2.30	0.93	7.02	0.00	0.38	n/a	11.03
Hornchurch	0.79	2.05	1.59	8.89	0.32	0.00	n/a	13.63
Other Outside LBBB	3.28	4.22	5.57	5.93	13.24	9.71	n/a	41.94
Total	131.27	127.82	132.54	109.73	159.55	190.35		864.95

Table 6: Future Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking (incl. Abbey Retail Park)	20.6%	3.6%	1.7%	0.5%	4.0%	5.0%	10.0%
Dagenham Heathway (incl. Merriellands RP)	4.7%	24.7%	7.9%	3.1%	1.0%	0.3%	10.0%
Chadwell Heath	0.5%	1.7%	3.9%	0.1%	6.2%	0.2%	5.0%
Green Lane	0.4%	1.6%	3.4%	0.0%	2.2%	0.2%	5.0%
Barking Riverside	8.0%	4.0%	0.0%	0.0%	0.0%	0.0%	5.0%
LBBB Total	34.2%	35.6%	16.9%	3.7%	13.4%	5.7%	
Central London	3.4%	1.2%	3.0%	2.7%	2.6%	6.9%	n/a
Westfield, Stratford	4.0%	1.4%	1.6%	0.2%	5.9%	11.1%	n/a
Lakeside	16.0%	19.0%	17.5%	32.4%	7.6%	6.8%	n/a
Bluewater	1.1%	0.3%	1.3%	2.1%	2.3%	0.7%	n/a
East Ham	1.3%	0.5%	0.3%	0.0%	0.2%	18.1%	n/a
Romford	11.9%	27.3%	46.0%	38.4%	20.4%	4.7%	n/a
Ilford	8.1%	2.9%	4.1%	0.0%	32.0%	11.5%	n/a
Beckton	17.0%	5.1%	3.2%	0.6%	7.1%	29.2%	n/a
Rainham	0.3%	1.8%	0.7%	6.4%	0.0%	0.2%	n/a
Hornchurch	0.6%	1.6%	1.2%	8.1%	0.2%	0.0%	n/a
Other Outside LBBB	2.1%	3.3%	4.2%	5.4%	8.3%	5.1%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, October 2013 - NLP adjustments to reflect commitments

Table 7: Future Comparison Goods Expenditure 2017 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2017	169.83	140.09	147.42	132.13	180.02	214.73		984.22
Barking (incl. Abbey Retail Park)	34.99	5.04	2.51	0.66	7.20	10.74	6.79	67.93
Dagenham Heathway (incl. Merriellands RP)	7.98	34.60	11.65	4.10	1.80	0.64	6.75	67.52
Chadwell Heath	0.85	2.38	5.75	0.13	11.16	0.43	1.09	21.79
Green Lane	0.68	2.24	5.01	0.00	3.96	0.43	0.65	12.97
Barking Riverside	13.59	5.60	0.00	0.00	0.00	0.00	1.01	20.20
LBBB Total	58.08	49.87	24.91	4.89	24.12	12.24	16.29	190.41
Central London	5.77	1.68	4.42	3.57	4.68	14.82	n/a	34.94
Westfield, Stratford	6.79	1.96	2.36	0.26	10.62	23.84	n/a	45.83
Lakeside	27.17	26.62	25.80	42.81	13.68	14.60	n/a	150.68
Bluewater	1.87	0.42	1.92	2.77	4.14	1.50	n/a	12.62
East Ham	2.21	0.70	0.44	0.00	0.36	38.87	n/a	42.58
Romford	20.21	38.24	67.81	50.74	36.72	10.09	n/a	223.82
Ilford	13.76	4.06	6.04	0.00	57.61	24.69	n/a	106.17
Beckton	28.87	7.14	4.72	0.79	12.78	62.70	n/a	117.01
Rainham	0.51	2.52	1.03	8.46	0.00	0.43	n/a	12.95
Hornchurch	1.02	2.24	1.77	10.70	0.36	0.00	n/a	16.09
Other Outside LBBB	3.57	4.62	6.19	7.13	14.94	10.95	n/a	47.41
Total	169.83	140.09	147.42	132.13	180.02	214.73		1,000.52

Table 8: Future Comparison Goods Expenditure 2022 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2022	225.70	159.17	169.07	167.64	211.63	249.12		1,182.33
Barking (incl. Abbey Retail Park)	46.49	5.73	2.87	0.84	8.47	12.46	8.54	85.40
Dagenham Heathway (incl. Merriellands RP)	10.61	39.32	13.36	5.20	2.12	0.75	7.93	79.27
Chadwell Heath	1.13	2.71	6.59	0.17	13.12	0.50	1.27	25.49
Green Lane	0.90	2.55	5.75	0.00	4.66	0.50	0.76	15.11
Barking Riverside	18.06	6.37	0.00	0.00	0.00	0.00	1.29	25.71
LBBB Total	77.19	56.67	28.57	6.20	28.36	14.20	19.78	230.97
Central London	7.67	1.91	5.07	4.53	5.50	17.19	n/a	41.87
Westfield, Stratford	9.03	2.23	2.71	0.34	12.49	27.65	n/a	54.43
Lakeside	36.11	30.24	29.59	54.32	16.08	16.94	n/a	183.28
Bluewater	2.48	0.48	2.20	3.52	4.87	1.74	n/a	15.29
East Ham	2.93	0.80	0.51	0.00	0.42	45.09	n/a	49.75
Romford	26.86	43.45	77.77	64.38	43.17	11.71	n/a	267.34
Ilford	18.28	4.62	6.93	0.00	67.72	28.65	n/a	126.20
Beckton	38.37	8.12	5.41	1.01	15.03	72.74	n/a	140.67
Rainham	0.68	2.87	1.18	10.73	0.00	0.50	n/a	15.95
Hornchurch	1.35	2.55	2.03	13.58	0.42	0.00	n/a	19.93
Other Outside LBBB	4.74	5.25	7.10	9.05	17.57	12.70	n/a	56.42
Total	225.70	159.17	169.07	167.64	211.63	249.12		1,202.11

Table 9: Future Comparison Goods Expenditure 2027 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2027	285.11	189.21	197.32	203.61	249.35	296.85		1,421.44
Barking (incl. Abbey Retail Park)	58.73	6.81	3.35	1.02	9.97	14.84	10.53	105.26
Dagenham Heathway (incl. Merrielands RP)	13.40	46.73	15.59	6.31	2.49	0.89	9.49	94.91
Chadwell Heath	1.43	3.22	7.70	0.20	15.46	0.59	1.50	30.10
Green Lane	1.14	3.03	6.71	0.00	5.49	0.59	0.89	17.85
Barking Riverside	22.81	7.57	0.00	0.00	0.00	0.00	1.60	31.98
LBBB Total	97.51	67.36	33.35	7.53	33.41	16.92	24.01	280.09
Central London	9.69	2.27	5.92	5.50	6.48	20.48	n/a	50.35
Westfield, Stratford	11.40	2.65	3.16	0.41	14.71	32.95	n/a	65.28
Lakeside	45.62	35.95	34.53	65.97	18.95	20.19	n/a	221.20
Bluewater	3.14	0.57	2.57	4.28	5.74	2.08	n/a	18.36
East Ham	3.71	0.95	0.59	0.00	0.50	53.73	n/a	59.47
Romford	33.93	51.65	90.77	78.19	50.87	13.95	n/a	319.35
Ilford	23.09	5.49	8.09	0.00	79.79	34.14	n/a	150.60
Beckton	48.47	9.65	6.31	1.22	17.70	86.68	n/a	170.04
Rainham	0.86	3.41	1.38	13.03	0.00	0.59	n/a	19.27
Hornchurch	1.71	3.03	2.37	16.49	0.50	0.00	n/a	24.10
Other Outside LBBB	5.99	6.24	8.29	10.99	20.70	15.14	n/a	67.35
Total	285.11	189.21	197.32	203.61	249.35	296.85		1,445.45

Table 10: Future Comparison Goods Expenditure 2032 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2032	349.35	225.51	232.27	237.17	292.60	351.72		1,688.62
Barking (incl. Abbey Retail Park)	71.97	8.12	3.95	1.19	11.70	17.59	12.72	127.23
Dagenham Heathway (incl. Merrielands RP)	16.42	55.70	18.35	7.35	2.93	1.06	11.31	113.11
Chadwell Heath	1.75	3.83	9.06	0.24	18.14	0.70	1.77	35.50
Green Lane	1.40	3.61	7.90	0.00	6.44	0.70	1.05	21.10
Barking Riverside	27.95	9.02	0.00	0.00	0.00	0.00	1.95	38.91
LBBB Total	119.48	80.28	39.25	8.78	39.21	20.05	28.81	335.85
Central London	11.88	2.71	6.97	6.40	7.61	24.27	n/a	59.83
Westfield, Stratford	13.97	3.16	3.72	0.47	17.26	39.04	n/a	77.63
Lakeside	55.90	42.85	40.65	76.84	22.24	23.92	n/a	262.39
Bluewater	3.84	0.68	3.02	4.98	6.73	2.46	n/a	21.71
East Ham	4.54	1.13	0.70	0.00	0.59	63.66	n/a	70.61
Romford	41.57	61.56	106.84	91.07	59.69	16.53	n/a	377.27
Ilford	28.30	6.54	9.52	0.00	93.63	40.45	n/a	178.44
Beckton	59.39	11.50	7.43	1.42	20.77	102.70	n/a	203.22
Rainham	1.05	4.06	1.63	15.18	0.00	0.70	n/a	22.62
Hornchurch	2.10	3.61	2.79	19.21	0.59	0.00	n/a	28.29
Other Outside LBBB	7.34	7.44	9.76	12.81	24.29	17.94	n/a	79.56
Total	349.35	225.51	232.27	237.17	292.60	351.72		1,717.43

Table 11: Comparison Goods Floorspace

Town/Store	Comparison Goods Floorspace (sq.m gross)	Comparison Goods Floorspace (sq.m net)
Barking		
Barking Town Centre comparison shops	19,050	13,335
Comparison floorspace in food stores	n/a	1,142
Barking Total	19,050	13,335
Abbey Retail Park		
Halfords	916	733
Dreams (Clearance)	3,210	2,568
Abbey Retail Park Total	4,126	3,301
Merriellands Retail Park		
Homebase	2,390	1,912
Argos	1,470	340
Dreams	538	430
Carpetright	935	748
Halfords	925	740
Topps Tiles	370	296
Asda	n/a	1,452
Merriellands Retail Park Total	6,628	5,918
Wickes, Barking	5,300	4,240
Dagenham Heathway		
Dagenham Heathway Centre comparison shops	6,360	4,452
Comparison floorspace in food stores	n/a	50
Dagenham Heathway Total	6,360	4,502
Chadwell Heath		
Chadwell Heath Centre comparison shops	3,950	2,765
Comparison floorspace in food stores	n/a	397
Chadwell Heath Total	3,950	3,162
Green Lane		
Green Lane Centre comparison shops	4,490	3,143
Comparison floorspace in food stores	n/a	41
Green Lane Total	4,490	3,184
LBBB TOTAL	49,904	37,642
Commitments		
Asda, Whalebone Lane	n/a	1,085
Asda, London Road	n/a	1,486
Unit shops, London Road	426	320
Sanofi Aventis site	n/a	1,740
Vicarage Fields	1,333	1,000
Barking Riverside	6,450	4,840
Morrisons extension, Becontree Heath	n/a	361
Total	426	10,831

Sources: IGD, Goad, VOA and LBBB

Table 12: Summary of Comparison Goods Expenditure Capacity 2013 to 2032

Centre	2013	2017	2022	2027	2032
Available Expenditure in LBBB (£m)					
Barking	60.19	67.93	85.40	105.26	127.23
Dagenham	63.10	67.52	79.27	94.91	113.11
Chadwell Heath	22.41	21.79	25.49	30.10	35.50
Green Lane	4.98	12.97	15.11	17.85	21.10
Barking Riverside	n/a	20.20	25.71	31.98	38.91
Total	150.69	190.41	230.97	280.09	335.85
Turnover of Existing Facilities (£m)					
Barking	60.19	65.15	71.94	79.42	87.69
Dagenham	63.10	68.30	75.41	83.26	91.92
Chadwell Heath	22.41	24.26	26.78	29.57	32.65
Green Lane	4.98	5.39	5.95	6.57	7.26
Barking Riverside	n/a	n/a	n/a	n/a	n/a
Total	150.69	163.11	180.08	198.83	219.52
Turnover of Commitments (£m)					
Barking	n/a	19.40	21.42	23.64	26.11
Dagenham	n/a	9.90	10.93	12.07	13.33
Chadwell Heath	n/a	0.00	0.00	0.00	0.00
Green Lane	n/a	12.59	13.90	15.35	16.95
Barking Riverside	n/a	24.20	26.72	29.50	32.57
Total	n/a	66.09	72.97	80.56	88.95
Surplus/Defecit Expenditure (£m)					
Barking	n/a	-16.63	-7.95	2.19	13.44
Dagenham	n/a	-10.68	-7.08	-0.42	7.86
Chadwell Heath	n/a	-2.47	-1.29	0.53	2.85
Green Lane	n/a	-5.01	-4.75	-4.07	-3.10
Barking Riverside	n/a	-4.00	-1.01	2.48	6.34
Total	n/a	-38.78	-22.08	0.70	27.39

Source: Tables 5 - 11

Table 13: Comparison Goods Floorspace Capacity 2013 to 2032

Centre	2017	2022	2027	2032
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,520	£6,095	£6,729
Floorspace Requirement (sq.m net)				
Barking	-3,325	-1,441	359	1,997
Dagenham	-2,136	-1,282	-69	1,168
Chadwell Heath	-493	-234	87	423
Green Lane	-1,002	-860	-668	-461
Barking Riverside	-800	-183	406	943
Total	-7,757	-4,000	115	4,070
Floorspace Requirement (sq.m gross)				
Barking	-4,433	-1,921	479	2,663
Dagenham	-2,848	-1,709	-92	1,557
Chadwell Heath	-658	-313	115	564
Green Lane	-1,336	-1,146	-891	-615
Barking Riverside	-1,067	-244	542	1,257
Total	-10,342	-5,334	153	5,426

Appendix 20 Food and Drink Assessment

Table 1: Population

Total Population	2011	2013	2017	2022	2027	2032
Zone 1 - Barking	59,436	66,267	79,697	94,079	103,150	109,550
Zone 2 - Dagenham	63,923	64,588	65,801	66,405	68,503	70,780
Zone 3 - Green Lane/Chadwell Heath	63,670	65,003	67,191	68,477	69,357	70,770
Zone 4 - Havering West	41,087	43,560	48,755	54,947	57,926	58,473
Zone 5 - Redbridge South	72,856	74,624	78,237	81,711	83,563	84,985
Zone 6 - Newham East	92,705	95,459	100,062	103,154	106,664	109,537
Total	393,677	409,501	439,743	468,773	489,163	504,095

Source: GLA 2012 Round of Demographic Projections - SHLAA-based ward projections

Table 2: Food and Drink Expenditure per person (£)

	2013	2017	2022	2027	2032
Zone 1 - Barking	810	856	918	984	1,055
Zone 2 - Dagenham	771	816	874	937	1,005
Zone 3 - Green Lane/Chadwell Heath	801	847	908	973	1,043
Zone 4 - Havering West	958	1,013	1,086	1,164	1,248
Zone 5 - Redbridge South	924	977	1,047	1,122	1,203
Zone 6 - Newham East	809	855	917	983	1,054

Source: Experian 2011

Notes: Data in 2011 prices Growth Rates: -0.9% 2011-2012, -0.2% 2012-2013, 1.4% per annum after 2013

Table 3: Total Food and Drink Expenditure (£M)

	2013	2017	2022	2027	2032
Zone 1 - Barking	53.68	68.25	86.36	101.51	115.56
Zone 2 - Dagenham	49.83	53.66	58.06	64.20	71.11
Zone 3 - Green Lane/Chadwell Heath	52.07	56.91	62.17	67.50	73.83
Zone 4 - Havering West	41.75	49.40	59.68	67.44	72.98
Zone 5 - Redbridge South	68.93	76.40	85.54	93.78	102.24
Zone 6 - Newham East	77.23	85.58	94.58	104.84	115.41
Total	343.48	390.20	446.38	499.26	551.14

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey, October 2013

Table 5: Base Year 2013 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2013	53.68	49.83	52.07	41.75	68.93	77.23		343.48
Barking	11.76	0.65	0.31	0.00	2.90	3.86	1.02	20.50
Dagenham	4.24	17.79	7.03	0.71	1.24	0.31	1.65	32.97
Chadwell Heath/Green Lane	2.84	3.69	7.71	0.00	9.24	0.54	1.26	25.28
LBBB Total	18.84	22.12	15.05	0.71	13.37	4.71	3.94	78.74
Outside LBBB	34.84	27.70	37.02	41.04	55.56	72.52	n/a	268.68
Total	53.68	49.83	52.07	41.75	68.93	77.23		347.42

Table 6: Future Food and Drink Market Shares (%)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	% Inflow
Barking	17.5%	1.2%	0.6%	0.0%	4.2%	5.0%	5.0%
Dagenham	7.1%	33.0%	13.5%	1.7%	1.8%	0.4%	5.0%
Chadwell Heath/Green Lane	5.3%	7.4%	14.8%	0.0%	13.4%	0.7%	5.0%
Barking Riverside	12.0%	7.0%	0.0%	0.0%	0.0%	0.0%	5.0%
LBB Total	41.9%	48.6%	28.9%	1.7%	19.4%	6.1%	
Outside LBB	58.1%	51.4%	71.1%	98.3%	80.6%	93.9%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, October 2013 and NLP adjustments

Table 7: Future Food and Drink Expenditure 2017 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2017	68.25	53.66	56.91	49.40	76.40	85.58		390.20
Barking	11.94	0.64	0.34	0.00	3.21	4.28	1.07	21.49
Dagenham	4.85	17.71	7.68	0.84	1.38	0.34	1.73	34.52
Chadwell Heath/Green Lane	3.62	3.97	8.42	0.00	10.24	0.60	1.41	28.26
Barking Riverside	8.19	3.76	0.00	0.00	0.00	0.00	0.63	12.57
LBB Total	28.60	26.08	16.45	0.84	14.82	5.22	4.84	96.85
Outside LBB	39.65	27.58	40.46	48.56	61.58	80.36	n/a	298.19
Total	68.25	53.66	56.91	49.40	76.40	85.58		395.04

Table 8: Future Food and Drink Expenditure 2022 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2022	86.36	58.06	62.17	59.68	85.54	94.58		446.38
Barking	15.11	0.70	0.37	0.00	3.59	4.73	1.29	25.79
Dagenham	6.13	19.16	8.39	1.01	1.54	0.38	1.93	38.54
Chadwell Heath/Green Lane	4.58	4.30	9.20	0.00	11.46	0.66	1.59	31.79
Barking Riverside	10.36	4.06	0.00	0.00	0.00	0.00	0.76	15.19
LBBB Total	36.19	28.21	17.97	1.01	16.59	5.77	5.57	111.31
Outside LBBB	50.18	29.84	44.20	58.66	68.95	88.81	n/a	340.64
Total	86.36	58.06	62.17	59.68	85.54	94.58		451.95

Table 9: Future Food and Drink Expenditure 2027 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2027	101.51	64.20	67.50	67.44	93.78	104.84		499.26
Barking	17.76	0.77	0.41	0.00	3.94	5.24	1.48	29.60
Dagenham	7.21	21.19	9.11	1.15	1.69	0.42	2.15	42.90
Chadwell Heath/Green Lane	5.38	4.75	9.99	0.00	12.57	0.73	1.76	35.18
Barking Riverside	12.18	4.49	0.00	0.00	0.00	0.00	0.88	17.55
LBBB Total	42.53	31.20	19.51	1.15	18.19	6.39	6.26	125.24
Outside LBBB	58.97	33.00	47.99	66.30	75.58	98.44	n/a	380.29
Total	101.51	64.20	67.50	67.44	93.78	104.84		505.52

Table 10: Future Food and Drink Expenditure 2032 (£m)

Centre/Facility	Zone 1 Barking	Zone 2 Dagenham	Zone 3 Green Lane/ Chadwell Heath	Zone 4 Havering West	Zone 5 Redbridge South	Zone 6 Newham East	Inflow	Total
Expenditure 2032	115.56	71.11	73.83	72.98	102.24	115.41		551.14
Barking	20.22	0.85	0.44	0.00	4.29	5.77	1.66	33.25
Dagenham	8.21	23.47	9.97	1.24	1.84	0.46	2.38	47.56
Chadwell Heath/Green Lane	6.12	5.26	10.93	0.00	13.70	0.81	1.94	38.76
Barking Riverside	13.87	4.98	0.00	0.00	0.00	0.00	0.99	19.84
LBBB Total	48.42	34.56	21.34	1.24	19.83	7.04	6.97	139.40
Outside LBBB	67.14	36.55	52.50	71.74	82.40	108.37	n/a	418.70
Total	115.56	71.11	73.83	72.98	102.24	115.41		558.11

Table 11: Food and Drink Establishments 2013

Location	Number of Outlets	Floorspace (sq.m gross)
Barking Town Centre	46	6,800
Dagenham Heathway	14	1,400
Chadwell Heath Centre	27	4,100
Green Lane Centre	18	2,000
Other LBBD	128	6,400
LBBD TOTAL	233	20,700
Barking Riverside Commitment*	n/a	3,900

* 20% of total Class A1 to A5 floorspace (maximum 19,700 sq.m gross)

Source: Goad and NLP survey

Table 12: Food and Drink Capacity Assessment 2013 to 2032

Centre	2013	2017	2022	2027	2032
Available Expenditure in LBBB (£m)					
Barking	20.50	21.49	25.79	29.60	33.25
Dagenham	32.97	34.52	38.54	42.90	47.56
Chadwell Heath/Green Lane	25.28	28.26	31.79	35.18	38.76
Barking Riverside	n/a	12.57	15.19	17.55	19.84
Total	78.74	96.85	111.31	125.24	139.40
Turnover of existing facilities (£m)					
Barking	20.50	20.91	21.33	21.76	22.20
Dagenham	32.97	33.63	34.48	35.35	36.24
Chadwell Heath/Green Lane	25.28	25.79	26.44	27.11	27.79
Barking Riverside	n/a	19.50	19.99	20.50	21.01
Total	78.74	99.83	102.24	104.72	107.25
Surplus expenditure (£m)					
Barking	n/a	0.58	4.46	7.84	11.05
Dagenham	n/a	0.89	4.06	7.55	11.32
Chadwell Heath/Green Lane	n/a	2.47	5.35	8.07	10.97
Barking Riverside	n/a	-6.93	-4.81	-2.94	-1.18
Total	n/a	-2.98	9.07	20.52	32.15
Food and Drink Turnover (£ per sq.m gross)	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace Capacity (sq.m gross)					
Barking	n/a	116	893	1,568	2,209
Dagenham	n/a	178	813	1,511	2,263
Chadwell Heath/Green Lane	n/a	494	1,069	1,614	2,193
Barking Riverside	n/a	-1,385	-961	-589	-236
Total	n/a	-597	1,813	4,104	6,431

Sources: Tables 5 to 11

Appendix 21 Retail Sites Assessment

Site Reference	Site Name	Total Area (ha)	Site Status	Assessment Criteria			Future Potential			General Comments	Overall Development Prospects	
				Existing Uses	Development Constraints	Access	Planning Factors	Barriers to Delivery	Timescale for Delivery			Scale of Development/Floorspace Potential
1	Abbey Retail Park, Barking	3.60	Site BTCSSA7 Barking Area Action Plan	Low quality retail warehouse units and a number of vacancies. Inefficient use of site.	Potential requirement to relocate existing occupiers.	Existing access from London Road/Abbey Road	Current planning application for a new Sainsbury's store (ref. 13/0052/FUL) with a proposed net convenience goods floorspace of 3,624 sq.m.	No obvious barriers to delivery	Short to medium term	Barking Area Action Plan suggests store of up to 7,500 sq.m net	Proposed uses identified in Barking Area Action Plan for new homes, ancillary leisure (restaurants, cafés, bars) and a retail superstore (subject to the linked redevelopment of the existing Tesco site on Highbridge Road for residential use). Given the identified need for a significant level of retail floorspace within Barking, the proposed redevelopment of this site for a food store could help to meet this need, subject to satisfying both the sequential approach and retail impact tests. The current application does not propose the closure/redevelopment of the existing Tesco store (as required in the Area Action Plan), however the capacity assessment suggests that Barking can support both stores in the short to medium term.	Good
2	London Road/North Street, Barking	1.30	Site BTCSSA1 Barking Area Action Plan	Cleared site. Previous mix of commercial retail A1/A3 uses, residential and office space.	None.	Existing access from London Road and North Street, pedestrian access from East Street	Planning permission for a replacement Asda store (ref. 11/00954/FUL) of 8,013 sq.m gross (net sales area of 3,716 sq.m) plus unit shops of 426 sq.m gross.	Site under development - no obvious barriers to delivery	Short term	Proposed development includes 8,439 sq.m gross retail floorspace	Site currently being redeveloped and retail floorspace taken into consideration in retail capacity assessment. Development will deliver new market square and improved links to East Street.	Good
3	Vicarage Field Shopping Centre, Barking	2.40	Site BTCSSA10 Barking Area Action Plan	Existing shopping centre and car park	Although shopping centre privately owned, development may be constrained by immediately surrounding uses. Adjacent to conservation area.	Access from Station Parade and Ripple Road but lacks visibility/prominence	Site located within the primary shopping area. Planning permission for mixed use development to include 1,333 sq.m gross additional retail floorspace plus 225 residential units (ref. 09/00475/FUL)	No obvious barriers to delivery	Short to medium term	Barking Area Action Plan suggests 2,500 sq.m net retail floorspace	Short term - priority should be the reuse of the Asda store, once it relocates to London Road/North Street, either for a single user or reconfigured to provide unit shops. Longer term aspiration for redevelopment of the existing shopping centre to create more prominence from Station Parade/Ripple Road and increase amount of retail floorspace.	Reasonable
4	Barking Station	7.90	Site BTCSSA3 Barking Area Action Plan; Barking Station Masterplan SPD (adopted February 2012)	Mix of uses including Barking Station, retail, residential, commercial	Barking Station is a listed building. Constraints associated with development above/adjacent to railway land.	Multiple accesses to large, prominent site in Barking town centre	Barking Station Masterplan suggests site could include improved transport interchange, shops/restaurants/cafés (7,000 sq.m net), office and other commercial uses (30,000 sq.m), hotel and residential (400-500 new homes).	Different components of the site may come forward within a range of timescales, affecting the comprehensive development Multiple land ownership	Overall development proposals divided into separate elements. Additional retail floorspace likely to be delivered medium to long term	5,000 - 10,000 sq.m gross, predominantly comparison goods and restaurant/cafés	Poor quality of areas surrounding the station entrance. Interior of station congested and overcrowded. Opportunity to create vastly improved gateway to Barking town centre. Potential to develop the site for a mix of town centre uses, including retail, leisure, office and residential. The comprehensive redevelopment of Barking Station and surrounding area provides the greatest opportunity for significant levels of new retail floorspace within Barking town centre. High street comparison goods retail is likely to be most appropriate on this site, rather than food store development. The Masterplan refers to the inclusion of a potential anchor comparison store at the junction of East Street, London Road, Linton Road, Ripple Road and Station Parade. The site could potentially incorporate a new "restaurant quarter" for Barking town centre, providing a range of family friendly restaurants and leisure uses, to aid the evening economy.	Reasonable
5	London Road/Linton Road/George Street, Barking	2.00	Not allocated	Multi storey car park, offices, telephone exchange, mixed commercial	Potential requirement to relocate existing occupiers.	Existing access from London Road	Site located adjacent to existing secondary shopping area and opposite new London Road/North Street development.	Land ownership unknown	Long term	Up to 5,000 sq.m gross	Potential redevelopment site for mixed use development with retail or leisure floorspace at ground floor and office/residential use above to extend the retail offer and attraction of the town centre.	Reasonable



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