Matter 10:
Employment and Horse Racing

12 September 2025

Appendices

M10a-b

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Susie Legg
Principal Policy Officer
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14th August 2025

Dear Susie,

Epsom & Ewell Retail & Commercial Leisure Needs Assessment, 2021

Many thanks for contacting us in respect of the Council's ongoing work preparing the borough's new Local Plan. Having written the Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update (RLNA) (published in September 2021), we understand that the Council require an in-depth review of the report and to issue conclusions as to whether it remains up-to-date, robust and sound given the passage of time. We focus in particular on the following key elements of the study:

- Planning Policy Framework
- National Trends and Legislative Change
- Economic Growth Projections

Planning Policy Framework

The RLNA was prepared in the context of the National Planning Policy Framework (NPPF) July 2021, and the Planning Practice Guidance (PPG), September 2020. The PPG in respect of town centres and retail remains unchanged, but the NPPF was subsequently updated in September 2023, and revised in December 2023 and December 2024.

There are, however, no changes of relevance to retail and town centres, and – consistent with that outlined in the RLNA – the most up-to-date NPPF continues to ensure the vitality of town centres, placing them at the heart of their communities and encouraging a positive approach to their growth, management and adaptation.

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The NPPF also continues to encourage planning policies to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, the extent of primary shopping areas and the location of sufficient development opportunity sites. The NPPF states that planning policies should also recognise the benefits of residential development and town centre living in ensuring the vitality of centres; and continues to endorse the sequential and impact test.

The RLNA will be used by the Council to inform the emerging Epsom & Ewell Local Plan, guiding development in the Borough over the plan period. The new Local Plan will replace the Core Strategy (2007), Plan E (Epsom Town Centre Area Action Plan 2011) and the Development Management Policies DPD (2015). The RLNA was prepared within this background context, and these circumstances remain unchanged.

The planning policy framework has not changed. The RLNA Planning Policy Framework remains up-to-date and relevant.

National Trends and Legislative Change

Published in September 2021, the RLNA was commissioned in response to the Covid-19 pandemic and sweeping changes to planning legislation in respect of the Use Classes Order and permitted development rights. These substantial shifts in circumstance had far reaching consequences for our town centres, leading to legislative change and a direct impact on emerging Local Plan policies. The RLNA was prepared within this background context and legislative framework, and the evidence base has taken full account of the consequent impacts of accelerated and ongoing challenges for the high street.

In particular, the RLNA concluded that the role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall, but emphasised that current thinking and research stressed the need to look beyond the role of retail in order to reinvent the high street. The RLNA highlighted that the town centre of the future must add an extra dimension to the retail experience. The RLNA was prepared within this framework of change and evolution, a trend that remains relevant today including the need for dynamic and multi-purpose town centres.

In 2024, the House of Lords Built Environment Committee conducted an inquiry into how high streets could be regenerated and become more resilient and attractive. In November 2024, the committee published its report, 'High Streets: Life beyond retail?'[1], concluding that the dominance of retail on high streets was likely in the past. The report added that whilst shopping would remain a key feature of high street activity, there was now greater demand and opportunities for restaurants and leisure activities, as well as for more public services, such as health centres and libraries, to play a bigger role in town centres. In the committee's view, the evidence presented in the report suggested "that there could be an optimistic and flourishing future for high streets".

Conclusions and recommendations presented in the RLNA respond to the wider national policy approach to drive flexibility in town centres and to deliver diversity and vibrancy. Specific policy recommendations responded to the new Use Class E, permitted development and the potential use of Article 4 Directions. Town centres and commercial markets will continue to evolve, but the RLNA was prepared within an analysis of commercial and consumer markets and planning legislation that remains relevant today. The RLNA conclusions and recommendations remain relevant within the wider national context in respect of retail and leisure floorspace.

[1] https://lordslibrary.parliament.uk/high-streets-life-beyond-retail-house-of-lords-built-environment-committee/

Economic Growth Projections

The RLNA forecasts the need for additional retail floorspace to the period 2032, based on the most up-to-date global and national economic trends and forecasts, as published in the Experian Retail Planner Briefing Note October 2020.

The RLNA concludes that the outputs from the previous 2020 evidence base Study had been impacted directly by Covid-19 as a consequence of accelerated trends in the growth of on-line shopping, and strong fluctuations in the efficiency of existing floorspace and its ability to absorb a growing proportion of expenditure. The RLNA concludes that there is no need to plan for additional comparison goods floorspace across the borough over the Local Plan period.

Consistent with the previous 2020 evidence base Study, the RLNA concludes that the extent and quality of centrally located foodstores in the borough is driving high levels of inflow via car-borne trips and substantial turnover and performance levels. This in turn is driving a higher 'need' figure for additional convenience goods floorspace within the borough. Scenario testing considered the needs of just borough residents alongside more sustainable shopping and travel patterns, leading to a much reduced need for additional floorspace (2,200 sq m net by 2027).

The RLNA concluded that this expenditure could – in part – be absorbed by the Sainsbury's at Kiln Lane, rather than being met in newly delivered floorspace. A new Lidl foodstore on the edge of the Primary Shopping Area opened on 12th August 2021, and whilst it was factored in as a commitment in the RLNA, this store will also likely absorb a growing proportion of expenditure as it settles into a more established trading pattern. The RLNA concluded there was no need to plan for additional foodstores/convenience goods floorspace over the plan period.

We have reviewed these findings having regard to the recently approved Aldi foodstore and most up-to-date published economic data.

Experian has subsequently published a revised Retail Planner Briefing Note No.22 (March 2025), responding to the most recent global and national economic trends, and presenting the most likely forecasts in respect of retail growth, sales densities and non-store/on-line shopping. An analysis of the March 2025 publication confirms that the RLNA remains a robust and sound evidence base with which to inform the new Local Plan.

In particular, the newly published data presents only minimal shifts in the rates of on-line shopping, consumer expenditure growth and sales density, all of which have the impact of reducing the RLNA published retail need forecasts:

- The rate of on-line shopping was forecast to reach 6.9% by 2032 for convenience goods, and 27.4% for comparison goods (RLNA 2021); this has fallen marginally to 6.9% and 26.2% respectively (Experian March 2025).
- Forecasts of per capita expenditure for convenience and comparison goods remain constrained and subdued, contributing to falling levels of retail need from that published in the RLNA. For convenience goods, the rates are declining year on year over the plan period through to 2032, whilst for comparison goods the rates are either declining or showing a marginal increase which only gathers pace towards the end of the plan period. The impact is a reduced growth in available expenditure.
- The March 2025 Experian analysis forecasts that sales densities for convenience floorspace will marginally decrease from 0.3% in the RLNA to around 0.1%. For comparison floorspace the sales density is also forecast to decrease, but again only marginally from 2.6%/2.9% to 2.5%. Existing floorspace will therefore absorb a lower proportion of available expenditure.

> Whilst this means there will be a greater level of residual expenditure this is not sufficient to outpace the fall in consumer expenditure growth.

On balance, the most up-to-date economic analysis published by Experian has a direct impact on reducing the forecast floorspace need for both convenience and comparison goods. Consistent with the RLNA, there is no need to plan for additional convenience and comparison goods floorspace. The constrained per capita expenditure growth rates are the key drivers reinforcing these conclusions.

For convenience goods, these findings are reinforced further by the recently approved Aldi foodstore (allowed at appeal in April 2025 / Ref: APP/P3610/W/24/3352418). Located outside Epsom Town Centre, in an out-of-centre location, planning permission (ref. 23/00402/FUL) allows the redevelopment of the site to provide a foodstore of 1,552 sq m over two floors of which 1,054 sq m is net sales area, with 66-space customer car park.

Local Plan Period

I understand that since the 2021 study was undertaken, the plan period has changed to 2022-2040. In the wider context of the study, we conclude that it is not necessary to extend the RLNA floorspace need forecasts beyond 2032 at the current time.

The NPPF confirms that 'the preparation and review of all policies should be underpinned by relevant and up-to-date evidence'. Paragraph 34 goes on to emphasise that:

> *"Policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years, and should then be updated as necessary. Reviews should be completed no later than five years from the adoption date of a plan, and should take into account changing circumstances affecting the area, or any relevant changes in national policy."*

At present there is nothing to suggest a substantial shift in planning policy, national trends, or commercial markets in the short to medium term, with high streets continuing to experience a series of challenges and opportunities arising from the evolution to more mixed-use destinations. Floorspace need forecasts will remain constrained for the foreseeable future, and the RLNA 10 year forecasts to the period 2032 are sufficiently robust and appropriate when preparing current local plan policies.

The NPPF recommends revisiting local plans and strategies every 5 years to assess whether they need updating, and that should be the case for the Epsom & Ewell Local Plan – particularly in the current challenging economic times and tentative spending patterns. Conclusions and recommendations set out in the RLNA are underpinned by this wider national context and remain relevant to the preparation of the new Local Plan.

Summary

The consideration of 'change' following the publication of the RLNA in September 2021 confirms that the evidence base remains robust and relevant in the preparation of the new Local Plan. Policy guidelines have not changed, the study takes into account wider national trends, the new Use Classes Order and up-to-date Planning Legislation, and report outputs respond fully to recent events – notably, continued economic uncertainty and rising prices in the period following the Covid-19 global health pandemic. We conclude that the RLNA 2021 evidence base remains robust and relevant in the preparation of the new Local Plan.

Yours sincerely

Caroline Marginson
Director

Appendix 1

Convenience Goods Floorspace Need Economic Update August 2025

Epsom & Ewell Retail & Commercial Leisure Study Update 2021 | Convenience Floorspace Need Including Economic Update August 2025

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2019	62,698	63,779	80,649	19,582	16,081	17,681	18,723	25,329	32,301	33,500	33,854	104,296	**508,473**
2022	65,073	66,003	83,570	20,149	16,611	18,246	19,268	25,798	32,778	34,513	34,616	107,740	**524,365**
2027	68,846	69,322	87,711	21,079	17,453	19,181	20,076	26,588	33,590	36,140	35,785	112,941	**548,712**
2032	72,101	72,253	91,311	21,974	18,235	19,869	20,823	27,335	34,457	37,514	36,831	117,436	**570,139**
Change 2019-32	***9,403***	***8,474***	***10,662***	***2,392***	***2,154***	***2,188***	***2,100***	***2,006***	***2,156***	***4,014***	***2,977***	***13,140***	***61,666***

Source: *Experian Micromarketer (2017-based population forecasts)*

Table 1a - Survey area postcode sectors

Zone	Postal Sectors
Zone 1	KT17 1/3/4 - KT18 5/7 - KT19 7/8/9
Zone 2	KT4 7/8 - KT17 2 - KT19 0 - SM2 7 - SM3 8
Zone 3	SM1 1/2/3/4 - SM2 5/6 - SM3 9
Zone 4	SM7 1/2/3
Zone 5	CR5 3 - KT20 6
Zone 6	KT20 7 - RH2 0/9
Zone 7	KT18 6 - KT20 5 - KT22 8
Zone 8	KT21 1/2 - KT22 0/7
Zone 9	KT11 2/3 - KT22 9 - KT23 3/4
Zone 10	KT9 1/2 - KT10 0
Zone 11	KT7 0 - KT8 0/2 - KT10 8/9
Zone 12	KT3 5/6 - KT5 8/9 - KT6 4/5/6/7 - SM4 4 - SW20 9

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Table 2 - Survey area per capita expenditure forecasts, convenience goods (locally-derived SFT)

	Expenditure per capita (£)	SFT (%) (Experian)	SFT (£)	Expenditure per capita less SFT
2019	2,485	11.6%	288	2,197
2022	2,489	12.8%	319	2,170
2027	2,318	13.9%	322	1,996
2032	2,286	14.3%	327	1,959

Expenditure growth rates: 2020: 6.8%; 2021: -1.3%; 2022: -5.0%; 2023: -3.5%; 2024: -1.8%; 2025: -0.8%; 2026: -0.6%; 2027-31: -0.3%; 2032: -0.2%.

Source: Experian E-Marketer. Expenditure growth rates are sourced from Experian Retail Planner 18 (October 2020) and Experian Retail Planner 22 (March 2025).

Source: SFT / Internet Sales are sourced from locally calculated rates as identified in the Household Telephone Survey (August 2019)

Table 3 - Survey area retail expenditure, convenience goods

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
2019	137.73	140.11	177.16	43.02	35.33	38.84	41.13	55.64	70.96	73.59	74.37	229.11	**1,116.98**
2022	141.21	143.22	181.34	43.72	36.05	39.59	41.81	55.98	71.13	74.89	75.12	233.79	**1,137.86**
2027	137.42	138.37	175.08	42.07	34.84	38.29	40.07	53.07	67.05	72.14	71.43	225.44	**1,095.26**
2032	141.25	141.55	178.89	43.05	35.72	38.93	40.79	53.55	67.51	73.49	72.16	230.07	**1,116.97**
Change 2019-32	***3.52***	***1.45***	***1.72***	***0.03***	***0.40***	***0.09***	***-0.33***	***-2.09***	***-3.45***	***-0.10***	***-2.21***	***0.96***	***-0.01***

Source: Tables 1 & 2

Table 4 - Convenience goods market share (%) - 2019

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Convenience goods floorspace in Epsom & Ewell (main stores)												
Epsom town centre												
Waitrose, Ashley Centre	6.6%	0.2%	0.2%	1.7%	0.2%	0.7%	1.1%	1.3%	0.2%	0.0%	0.1%	0.0%
Marks & Spencer, Ashley Centre	2.3%	0.0%	0.0%	0.0%	0.4%	0.9%	2.3%	0.6%	0.2%	0.8%	0.3%	0.2%
Tesco Express, Epsom Station	0.6%	0.4%	1.9%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Upper High Street	0.4%	1.1%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Station Approach	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Sub-total, Epsom town centre stores	*10.3%*	*1.6%*	*2.1%*	*1.7%*	*1.9%*	*1.7%*	*3.4%*	*1.9%*	*0.4%*	*0.8%*	*0.4%*	*0.6%*
Ewell district centre												
Sainsbury's Local, Cheam Road	0.9%	1.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Co-Op, High Street	1.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Ewell district centre stores	*1.8%*	*1.5%*	*0.0%*	*0.5%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.2%*
Stoneleigh district centre												
Sainsbury's Local, Broadway	0.0%	6.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Co-Op, Broadway	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Stoneleigh district centre stores	*0.0%*	*10.1%*	*0.0%*	*0.8%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.3%*
Kingston Road local centre												
Aldi, Kingston Road	6.8%	7.8%	0.5%	1.6%	0.0%	0.1%	2.4%	0.4%	0.0%	1.4%	0.7%	5.7%
Co-op, Kingston Road	0.7%	1.3%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Sub-total, Kingston Road local centre stores	*7.5%*	*9.0%*	*0.5%*	*1.9%*	*0.0%*	*0.1%*	*2.4%*	*0.4%*	*0.0%*	*1.4%*	*1.1%*	*5.7%*
Chessington Road (Green Lanes) local centre												
Co-Op, Chessington Road	2.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%
Ruxley Lane (Gatley Avenue) local centre												
Tesco Express, Ruxley Lane	1.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
Other stores (not within a defined centre)												
Sainsbury's, Kiln Lane, Epsom	35.3%	10.6%	0.0%	10.4%	2.6%	1.7%	5.9%	4.1%	0.4%	6.3%	1.7%	0.3%
Co-Op, Ruxley Lane, West Ewell	3.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Esso PFS, Reigate Road, Epsom	1.9%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Tesco Express, Horton Retail Centre, Epsom	2.4%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*42.8%*	*12.0%*	*0.2%*	*10.4%*	*2.6%*	*1.7%*	*5.9%*	*4.1%*	*0.4%*	*6.4%*	*1.7%*	*0.5%*
Total for Epsom & Ewell Borough (A)	**66.9%**	**35.1%**	**2.8%**	**15.2%**	**4.5%**	**3.5%**	**11.7%**	**6.3%**	**0.8%**	**9.5%**	**3.2%**	**7.8%**

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Table 4 - Convenience goods market share (%) - 2019 - continued

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Convenience goods floorspace outside Epsom & Ewell Borough												
Other main stores in survey area												
Waitrose, Worcester Park (zone 2)	0.4%	6.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Sainsbury's Local, Worcester Park (zone 2)	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Asda, St Nicholas Way, Sutton (zone 3)	0.4%	1.8%	7.3%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Morrisons, High Street, Sutton (zone 3)	0.0%	0.9%	10.6%	1.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, High Street, Sutton (zone 3)	0.1%	1.5%	15.4%	1.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, London Road, North Cheam (zone 3)	1.1%	21.5%	11.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.5%	4.5%	15.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
Waitrose, Banstead (zone 4)	2.7%	2.3%	1.0%	28.3%	13.2%	4.3%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Burgh Heath (zone 7)	7.8%	0.0%	1.8%	30.3%	24.3%	6.0%	35.2%	1.3%	1.3%	2.1%	0.5%	0.0%
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0%	0.0%	0.0%	0.0%	0.5%	0.3%	11.6%	11.5%	13.7%	0.4%	0.0%	0.0%
Lidl, North Street, Leatherhead (zone 8)	1.9%	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%	10.9%	8.9%	0.0%	0.0%	0.0%
Tesco, Oxshott Road, Leatherhead (zone 8)	1.3%	0.0%	0.0%	0.0%	0.0%	1.1%	6.6%	34.8%	18.5%	5.6%	0.6%	0.0%
M&S Foodhall, Ashtead (zone 8)	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	9.2%	0.6%	0.0%	0.0%	0.0%
Tesco Express, Ashtead (zone 8)	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	11.2%	0.0%	0.0%	0.3%	0.0%
Waitrose, Esher (zone 11)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	12.9%	0.0%
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	1.8%	9.9%
Waitrose, Surbiton (zone 12)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	9.6%	7.3%
Other main stores in survey area (outside E&E Borough)	4.5%	12.7%	19.9%	13.1%	13.0%	16.3%	16.9%	5.6%	26.9%	26.7%	20.2%	17.3%
Sub-total, other stores in survey area (B)	*22.2%*	*56.8%*	*82.2%*	*78.2%*	*52.7%*	*28.4%*	*78.0%*	*84.6%*	*70.5%*	*54.2%*	*45.9%*	*41.5%*
Stores outside survey area*												
**stores with a market share >10% from any individual zone*												
Morrisons, Reigate	0.0%	0.2%	0.0%	0.2%	0.9%	39.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
Sainsbury's, Bridge Way, Cobham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	10.4%	2.3%	8.4%	0.7%
Sainsbury's, London Road, Redhill	0.0%	0.0%	0.0%	0.0%	1.4%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Beverley Way, New Malden	2.1%	2.5%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	9.2%	3.7%	13.9%
Tesco, Hurst Road, West Molesey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	13.8%	0.3%
Other main stores outside survey area	7.7%	3.8%	12.9%	4.3%	39.5%	13.8%	7.0%	6.0%	13.7%	23.3%	20.8%	34.2%
Sub-total, stores outside survey area (C)	*9.7%*	*6.5%*	*13.0%*	*4.5%*	*41.7%*	*65.9%*	*7.2%*	*6.5%*	*25.1%*	*35.0%*	*46.7%*	*49.1%*
Total for stores outside Borough & survey area (B+C)	**31.9%**	**63.2%**	**95.2%**	**82.7%**	**94.4%**	**94.3%**	**85.2%**	**91.1%**	**95.6%**	**89.1%**	**92.6%**	**90.6%**
Local convenience goods												
Local shops & other, Epsom town centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops & other, elsewhere in Epsom & Ewell Borough	1.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, elsewhere in survey area (outside E&E Borough)	0.0%	1.3%	1.9%	2.1%	1.1%	2.2%	2.4%	2.6%	3.6%	1.3%	4.1%	1.6%
Total for local shops (D)	**1.2%**	**1.7%**	**2.0%**	**2.1%**	**1.1%**	**2.2%**	**3.1%**	**2.6%**	**3.6%**	**1.3%**	**4.1%**	**1.6%**
Total (A+B+C+D)	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey, August 2019

Table 5 - Convenience goods spend (£m) 2019

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2019	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.1	0.2	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.2**	**1.1%**
Marks & Spencer, Ashley Centre	3.2	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	**6.4**	**0.6%**
Tesco Express, Epsom Station	0.8	0.5	3.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.4%**
Co-Op, Upper High Street	0.6	1.5	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.4**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.3*	*2.3*	*3.8*	*0.7*	*0.7*	*0.7*	*1.4*	*1.0*	*0.3*	*0.6*	*0.3*	*1.4*	***27.4***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.3**	**0.3%**
Co-Op, High Street	1.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.9**	**0.2%**
Sub-total, Ewell district centre stores	*2.5*	*2.1*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.3***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**9.8**	**0.9%**
Co-Op, Broadway	0.0	5.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.6**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.2*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***15.3***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.3	10.9	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.1	**37.7**	**3.4%**
Co-op, Kingston Road	1.0	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.2**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.3*	*12.7*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*13.1*	***40.8***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.6	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**5.6**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.1**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	48.7	14.9	0.0	4.5	0.9	0.7	2.4	2.3	0.3	4.6	1.3	0.8	**81.3**	**7.3%**
Co-Op, Ruxley Lane, West Ewell	4.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	**0.4%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.0**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.1**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*59.0*	*16.8*	*0.3*	*4.5*	*0.9*	*0.7*	*2.4*	*2.3*	*0.3*	*4.7*	*1.3*	*1.2*	***94.3***	***8.4%***
Total for Epsom & Ewell Borough (A)	**92.2**	**49.1**	**4.9**	**6.5**	**1.6**	**1.4**	**4.8**	**3.5**	**0.6**	**7.0**	**2.4**	**18.0**	**191.9**	**17.2%**

Table 5 - Convenience goods spend (£m) 2019 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2019	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**11.8**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	6.9	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**7.3**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.5	12.9	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**17.1**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.2	18.8	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**20.8**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.3	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.5**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.5	30.1	19.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	**61.2**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.3	26.5	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	**38.6**	**3.5%**
Waitrose, Banstead (zone 4)	3.7	3.2	1.9	12.2	4.7	1.7	2.5	0.0	0.0	0.0	0.0	0.0	**29.8**	**2.7%**
Asda, Burgh Heath (zone 7)	10.7	0.0	3.1	13.0	8.6	2.3	14.5	0.7	0.9	1.5	0.4	0.0	**55.8**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.8	6.4	9.7	0.3	0.0	0.0	**21.5**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	6.1	6.3	0.0	0.0	0.0	**15.6**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	19.4	13.1	4.1	0.5	0.0	**42.0**	**3.8%**
M&S Foodhall, Ashtead (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	5.1	0.5	0.0	0.0	0.0	**7.2**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.2	0.0	0.0	0.2	0.0	**6.9**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	9.6	0.0	**15.2**	**1.4%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	1.3	22.7	**27.0**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	7.2	16.8	**29.7**	**2.7%**
Other main stores in survey area (outside E&E Borough)	6.2	17.7	35.3	5.6	4.6	6.3	6.9	3.1	19.1	19.6	15.0	39.6	**179.2**	**16.0%**
Sub-total, other stores in survey area (B)	*30.5*	*79.5*	*145.6*	*33.7*	*18.6*	*11.0*	*32.1*	*47.1*	*50.1*	*39.9*	*34.1*	*95.1*	***617.2***	***55.3%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.4	0.0	0.0	0.7	0.0	0.0	0.0	**16.7**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.4	1.7	6.3	1.5	**17.2**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.8	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.5%**
Tesco Extra, Beverley Way, New Malden	2.8	3.5	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.7	2.7	31.9	**48.0**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	10.2	0.8	**11.2**	**1.0%**
Other main stores outside survey area	10.5	5.4	22.8	1.8	13.9	5.4	2.9	3.3	9.7	17.1	15.5	78.3	**186.8**	**16.7%**
Sub-total, stores outside survey area (C)	*13.4*	*9.1*	*23.1*	*1.9*	*14.7*	*25.6*	*3.0*	*3.6*	*17.8*	*25.7*	*34.8*	*112.4*	***285.2***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**43.9**	**88.6**	**168.7**	**35.6**	**33.3**	**36.6**	**35.0**	**50.7**	**67.8**	**65.6**	**68.9**	**207.5**	**902.3**	***80.8%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.3	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.4	0.9	0.4	0.8	1.0	1.4	2.6	1.0	3.1	3.7	**20.1**	**1.8%**
Total for local shops (D)	**1.7**	**2.4**	**3.5**	**0.9**	**0.4**	**0.8**	**1.3**	**1.4**	**2.6**	**1.0**	**3.1**	**3.7**	**22.7**	**2.0%**
Total (A+B+C+D)	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0%**

Source: Table 3, Table 4

Table 6 - Convenience goods spend (£m) 2022

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2022	**141.2**	**143.2**	**181.3**	**43.7**	**36.0**	**39.6**	**41.8**	**56.0**	**71.1**	**74.9**	**75.1**	**233.8**	**1,137.9**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.3	0.3	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.5**	**1.1%**
Marks & Spencer, Ashley Centre	3.3	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	**6.5**	**0.6%**
Tesco Express, Epsom Station	0.8	0.5	3.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.4%**
Co-Op, Upper High Street	0.6	1.6	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.6*	*2.4*	*3.9*	*0.7*	*0.7*	*0.7*	*1.4*	*1.0*	*0.3*	*0.6*	*0.3*	*1.5*	***28.0***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.4**	**0.3%**
Co-Op, High Street	1.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.0**	**0.2%**
Sub-total, Ewell district centre stores	*2.6*	*2.1*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.4***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.8	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**10.0**	**0.9%**
Co-Op, Broadway	0.0	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.5*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***15.7***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.6	11.1	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.4	**38.5**	**3.4%**
Co-op, Kingston Road	1.0	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.2**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.6*	*12.9*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*13.4*	***41.7***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**5.7**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.2**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	49.9	15.2	0.0	4.5	0.9	0.7	2.5	2.3	0.3	4.7	1.3	0.8	**83.1**	**7.3%**
Co-Op, Ruxley Lane, West Ewell	4.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.1**	**0.4%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.1**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.4	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.2**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*60.5*	*17.2*	*0.3*	*4.5*	*0.9*	*0.7*	*2.5*	*2.3*	*0.3*	*4.8*	*1.3*	*1.2*	***96.5***	***8.5%***
Total for Epsom & Ewell Borough (A)	**94.5**	**50.2**	**5.1**	**6.6**	**1.6**	**1.4**	**4.9**	**3.5**	**0.6**	**7.1**	**2.4**	**18.3**	**196.2**	**17.2%**

Table 6 - Convenience goods spend (£m) 2022 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2022	**141.2**	**143.2**	**181.3**	**43.7**	**36.0**	**39.6**	**41.8**	**56.0**	**71.1**	**74.9**	**75.1**	**233.8**	**1,137.9**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**12.0**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**7.5**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.6	13.2	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**17.5**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	19.2	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**21.2**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.9	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.2**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.6	30.7	20.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	**62.6**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.4	27.2	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	**39.5**	**3.5%**
Waitrose, Banstead (zone 4)	3.8	3.3	1.9	12.4	4.8	1.7	2.5	0.0	0.0	0.0	0.0	0.0	**30.4**	**2.7%**
Asda, Burgh Heath (zone 7)	11.0	0.0	3.2	13.2	8.8	2.4	14.7	0.7	0.9	1.6	0.4	0.0	**56.9**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.8	6.4	9.8	0.3	0.0	0.0	**21.7**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	6.1	6.3	0.0	0.0	0.0	**15.7**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.8	19.5	13.1	4.2	0.5	0.0	**42.4**	**3.7%**
M&S Foodhall, Ashtead (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	5.1	0.5	0.0	0.0	0.0	**7.2**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.3	0.0	0.0	0.2	0.0	**7.0**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	9.7	0.0	**15.4**	**1.4%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	1.3	23.2	**27.5**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	7.2	17.1	**30.2**	**2.7%**
Other main stores in survey area (outside E&E Borough)	6.4	18.1	36.1	5.7	4.7	6.5	7.1	3.2	19.1	20.0	15.2	40.4	**182.4**	**16.0%**
Sub-total, other stores in survey area (B)	*31.3*	*81.3*	*149.0*	*34.2*	*19.0*	*11.2*	*32.6*	*47.4*	*50.2*	*40.6*	*34.5*	*97.0*	***628.2***	***55.2%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.7	0.0	0.0	0.7	0.0	0.0	0.0	**17.0**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.4	1.7	6.3	1.5	**17.3**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.9	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	**0.5%**
Tesco Extra, Beverley Way, New Malden	2.9	3.6	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.9	2.8	32.5	**49.0**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	10.3	0.8	**11.3**	**1.0%**
Other main stores outside survey area	10.8	5.5	23.4	1.9	14.2	5.5	2.9	3.3	9.8	17.4	15.7	79.9	**190.3**	**16.7%**
Sub-total, stores outside survey area (C)	*13.7*	*9.3*	*23.7*	*2.0*	*15.0*	*26.1*	*3.0*	*3.6*	*17.8*	*26.2*	*35.1*	*114.7*	***290.3***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**45.0**	**90.6**	**172.7**	**36.2**	**34.0**	**37.4**	**35.6**	**51.0**	**68.0**	**66.8**	**69.6**	**211.7**	**918.5**	***80.7%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.4	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.5	0.9	0.4	0.9	1.0	1.4	2.6	1.0	3.1	3.7	**20.4**	**1.8%**
Total for local shops (D)	**1.7**	**2.4**	**3.6**	**0.9**	**0.4**	**0.9**	**1.3**	**1.4**	**2.6**	**1.0**	**3.1**	**3.7**	**23.1**	**2.0%**
Total (A+B+C+D)	**141.2**	**143.2**	**181.3**	**43.7**	**36.0**	**39.6**	**41.8**	**56.0**	**71.1**	**74.9**	**75.1**	**233.8**	**1,137.9**	**100.0%**

Source: Table 3, Table 4

Table 7 - Convenience goods spend (£m) 2027

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2027	**137.4**	**138.4**	**175.1**	**42.1**	**34.8**	**38.3**	**40.1**	**53.1**	**67.0**	**72.1**	**71.4**	**225.4**	**1,095.3**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.1	0.2	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.1**	**1.1%**
Marks & Spencer, Ashley Centre	3.2	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	**6.3**	**0.6%**
Tesco Express, Epsom Station	0.8	0.5	3.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.4%**
Co-Op, Upper High Street	0.6	1.5	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.4**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.2*	*2.3*	*3.7*	*0.7*	*0.7*	*0.6*	*1.4*	*1.0*	*0.3*	*0.6*	*0.3*	*1.4*	***27.1***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.4	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.3**	**0.3%**
Co-Op, High Street	1.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.9**	**0.2%**
Sub-total, Ewell district centre stores	*2.5*	*2.1*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.2***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.5	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**9.6**	**0.9%**
Co-Op, Broadway	0.0	5.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.0*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***15.1***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.3	10.8	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	12.9	**37.2**	**3.4%**
Co-op, Kingston Road	1.0	1.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.1**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.3*	*12.5*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*12.9*	***40.3***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.6	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.9	**5.6**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.1**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	48.6	14.7	0.0	4.4	0.9	0.7	2.4	2.2	0.3	4.6	1.2	0.8	**80.5**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	4.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	**0.5%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.0**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.0**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*58.9*	*16.6*	*0.3*	*4.4*	*0.9*	*0.7*	*2.4*	*2.2*	*0.3*	*4.6*	*1.2*	*1.2*	***93.5***	***8.5%***
Total for Epsom & Ewell Borough (A)	**91.9**	**48.5**	**4.9**	**6.4**	**1.6**	**1.3**	**4.7**	**3.4**	**0.5**	**6.9**	**2.3**	**17.7**	**190.0**	**17.3%**

Table 7 - Convenience goods spend (£m) 2027 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2027	**137.4**	**138.4**	**175.1**	**42.1**	**34.8**	**38.3**	**40.1**	**53.1**	**67.0**	**72.1**	**71.4**	**225.4**	**1,095.3**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**11.6**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**7.2**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.5	12.8	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**16.9**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.2	18.5	0.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**20.5**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.0	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.1**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.5	29.7	19.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.7	**60.5**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.2	26.2	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	**38.1**	**3.5%**
Waitrose, Banstead (zone 4)	3.7	3.2	1.8	11.9	4.6	1.6	2.4	0.0	0.0	0.0	0.0	0.0	**29.3**	**2.7%**
Asda, Burgh Heath (zone 7)	10.7	0.0	3.1	12.7	8.5	2.3	14.1	0.7	0.9	1.5	0.4	0.0	**54.8**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.6	6.1	9.2	0.3	0.0	0.0	**20.5**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	5.8	6.0	0.0	0.0	0.0	**14.9**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	18.5	12.4	4.1	0.4	0.0	**40.2**	**3.7%**
M&S Foodhall, Ashtead (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	4.9	0.4	0.0	0.0	0.0	**6.9**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.0	0.0	0.0	0.2	0.0	**6.6**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	9.2	0.0	**14.7**	**1.3%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	1.3	22.4	**26.5**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	6.9	16.5	**29.0**	**2.6%**
Other main stores in survey area (outside E&E Borough)	6.2	17.5	34.9	5.5	4.5	6.3	6.8	3.0	18.0	19.3	14.4	39.0	**175.3**	**16.0%**
Sub-total, other stores in survey area (B)	*30.4*	*78.5*	*143.9*	*32.9*	*18.4*	*10.9*	*31.2*	*44.9*	*47.3*	*39.1*	*32.8*	*93.5*	***603.8***	***55.1%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.2	0.0	0.0	0.6	0.0	0.0	0.0	**16.5**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.0	1.7	6.0	1.5	**16.4**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.7	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	**0.5%**
Tesco Extra, Beverley Way, New Malden	2.8	3.4	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.6	2.6	31.4	**47.2**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	9.8	0.8	**10.8**	**1.0%**
Other main stores outside survey area	10.5	5.3	22.6	1.8	13.8	5.3	2.8	3.2	9.2	16.8	14.9	77.0	**183.1**	**16.7%**
Sub-total, stores outside survey area (C)	*13.3*	*9.0*	*22.8*	*1.9*	*14.5*	*25.2*	*2.9*	*3.5*	*16.8*	*25.2*	*33.4*	*110.6*	***279.2***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**43.8**	**87.5**	**166.7**	**34.8**	**32.9**	**36.1**	**34.1**	**48.3**	**64.1**	**64.3**	**66.2**	**204.2**	**883.1**	***80.6%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.3	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.3	0.9	0.4	0.8	1.0	1.4	2.4	1.0	3.0	3.6	**19.5**	**1.8%**
Total for local shops (D)	**1.7**	**2.3**	**3.5**	**0.9**	**0.4**	**0.8**	**1.3**	**1.4**	**2.4**	**1.0**	**3.0**	**3.6**	**22.2**	**2.0%**
Total (A+B+C+D)	**137.4**	**138.4**	**175.1**	**42.1**	**34.8**	**38.3**	**40.1**	**53.1**	**67.0**	**72.1**	**71.4**	**225.4**	**1,095.3**	**100.0%**

Source: Table 3, Table 4

Table 8 - Convenience goods spend (£m) 2032

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2032	**141.3**	**141.6**	**178.9**	**43.0**	**35.7**	**38.9**	**40.8**	**53.6**	**67.5**	**73.5**	**72.2**	**230.1**	**1,117.0**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.3	0.2	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.4**	**1.1%**
Marks & Spencer, Ashley Centre	3.3	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	**6.4**	**0.6%**
Tesco Express, Epsom Station	0.8	0.5	3.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.4%**
Co-Op, Upper High Street	0.6	1.5	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.6*	*2.3*	*3.8*	*0.7*	*0.7*	*0.7*	*1.4*	*1.0*	*0.3*	*0.6*	*0.3*	*1.4*	***27.8***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.4**	**0.3%**
Co-Op, High Street	1.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.0**	**0.2%**
Sub-total, Ewell district centre stores	*2.6*	*2.1*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.4***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**9.9**	**0.9%**
Co-Op, Broadway	0.0	5.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.6**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.4*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***15.5***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.6	11.0	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.2	**38.0**	**3.4%**
Co-op, Kingston Road	1.0	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.2**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.6*	*12.8*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*13.2*	***41.2***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**5.7**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.2**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	49.9	15.0	0.0	4.5	0.9	0.7	2.4	2.2	0.3	4.6	1.3	0.8	**82.5**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	4.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.1**	**0.5%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.1**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.4	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.2**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*60.5*	*17.0*	*0.3*	*4.5*	*0.9*	*0.7*	*2.4*	*2.2*	*0.3*	*4.7*	*1.3*	*1.2*	***95.9***	***8.6%***
Total for Epsom & Ewell Borough (A)	**94.5**	**49.6**	**5.0**	**6.5**	**1.6**	**1.4**	**4.8**	**3.4**	**0.5**	**7.0**	**2.3**	**18.0**	**194.7**	**17.4%**

Table 8 - Convenience goods spend (£m) 2032 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2032	**141.3**	**141.6**	**178.9**	**43.0**	**35.7**	**38.9**	**40.8**	**53.6**	**67.5**	**73.5**	**72.2**	**230.1**	**1,117.0**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**11.9**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**7.4**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.6	13.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**17.2**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	18.9	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**21.0**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.6	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.8**	**2.8%**
Sainsbury's, London Road, North Cheam (zone 3)	1.6	30.4	19.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	**61.8**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.4	26.8	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	**39.0**	**3.5%**
Waitrose, Banstead (zone 4)	3.8	3.3	1.9	12.2	4.7	1.7	2.5	0.0	0.0	0.0	0.0	0.0	**30.0**	**2.7%**
Asda, Burgh Heath (zone 7)	11.0	0.0	3.1	13.0	8.7	2.3	14.4	0.7	0.9	1.5	0.4	0.0	**56.0**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.7	6.2	9.3	0.3	0.0	0.0	**20.7**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	5.8	6.0	0.0	0.0	0.0	**15.1**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	18.7	12.5	4.1	0.5	0.0	**40.7**	**3.6%**
M&S Foodhall, Ashtead (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	4.9	0.4	0.0	0.0	0.0	**7.0**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.0	0.0	0.0	0.2	0.0	**6.7**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	9.3	0.0	**14.9**	**1.3%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	1.3	22.8	**27.0**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	6.9	16.9	**29.5**	**2.6%**
Other main stores in survey area (outside E&E Borough)	6.4	17.9	35.6	5.6	4.7	6.4	6.9	3.0	18.1	19.6	14.6	39.8	**178.6**	**16.0%**
Sub-total, other stores in survey area (B)	*31.3*	*80.3*	*147.0*	*33.7*	*18.8*	*11.1*	*31.8*	*45.3*	*47.6*	*39.8*	*33.1*	*95.5*	***615.3***	***55.1%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.5	0.0	0.0	0.6	0.0	0.0	0.0	**16.7**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.0	1.7	6.1	1.5	**16.6**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.8	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.5%**
Tesco Extra, Beverley Way, New Malden	2.9	3.5	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.7	2.7	32.0	**48.2**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	9.9	0.8	**10.9**	**1.0%**
Other main stores outside survey area	10.8	5.4	23.0	1.8	14.1	5.4	2.9	3.2	9.3	17.1	15.0	78.6	**186.7**	**16.7%**
Sub-total, stores outside survey area (C)	*13.7*	*9.2*	*23.3*	*1.9*	*14.9*	*25.7*	*2.9*	*3.5*	*16.9*	*25.7*	*33.7*	*112.9*	***284.4***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**45.0**	**89.5**	**170.3**	**35.6**	**33.7**	**36.7**	**34.7**	**48.8**	**64.5**	**65.5**	**66.9**	**208.4**	**899.7**	***80.6%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.4	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.4	0.9	0.4	0.8	1.0	1.4	2.4	1.0	3.0	3.7	**19.9**	**1.8%**
Total for local shops (D)	**1.7**	**2.4**	**3.6**	**0.9**	**0.4**	**0.8**	**1.3**	**1.4**	**2.4**	**1.0**	**3.0**	**3.7**	**22.6**	**2.0%**
Total (A+B+C+D)	**141.3**	**141.6**	**178.9**	**43.0**	**35.7**	**38.9**	**40.8**	**53.6**	**67.5**	**73.5**	**72.2**	**230.1**	**1,117.0**	**100.0%**

Source: Table 3, Table 4

Table 9 - Trading performance of existing convenience floorspace in Epsom & Ewell Borough (main stores)

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2019 (£m)	Est. Actual Turnover 2019 (£m) (Table 5a)	Difference from Avg Turnover 2019 (£m)
Epsom town centre							
Waitrose, Ashley Centre	1,318	90%	1,186	13,431	15.9	12.2	-3.7
Marks & Spencer, Ashley Centre	954	94%	897	10,965	9.8	6.4	-3.5
Tesco Express, Epsom Station	300	95%	285	12,911	3.7	4.8	1.1
Co-Op, Upper High Street	179	95%	170	8,269	1.4	2.4	1.0
Co-Op, Station Approach	159	95%	151	8,269	1.2	1.6	0.3
Sub-total, Epsom town centre stores	2,910	-	2,689	-	32.1	27.4	-4.7
Ewell district centre							
Sainsbury's Local, Cheam Road	*250*	95%	238	12,191	2.9	3.3	0.5
Co-Op, High Street	235	95%	223	8,269	1.8	1.9	0.1
Sub-total, Ewell district centre stores	485	-	461	-	4.7	5.3	0.5
Stoneleigh district centre							
Sainsbury's Local, Broadway	250	95%	238	12,191	2.9	9.8	6.9
Co-Op, Broadway	276	95%	262	8,269	2.2	5.6	3.4
Sub-total, Stoneleigh district centre stores	526	-	500	-	5.1	15.3	10.3
Kingston Road local centre							
Aldi, Kingston Road	1,050	80%	840	9,930	8.3	37.7	29.3
Co-op, Kingston Road	*300*	87%	262	8,269	2.2	3.2	1.0
Sub-total, Kingston Road local centre stores	1,350	-	1,102	-	10.5	40.8	30.3
Chessington Road (Green Lanes) local centre							
Co-Op, Chessington Road	*250*	95%	238	8,269	2.0	5.6	3.6
Ruxley Lane (Gatley Avenue) local centre							
Tesco Express, Ruxley Lane	*300*	95%	285	12,911	3.7	3.1	-0.6
Other stores (not within a defined centre)							
Sainsbury's, Kiln Lane, Epsom	5,107	70%	3,575	12,191	43.6	81.3	37.7
Co-Op, Ruxley Lane, West Ewell	*300*	95%	285	8,269	2.4	5.0	2.6
Tesco Express, Esso PFS, Reigate Road, Epsom	134	95%	127	12,911	1.6	3.0	1.4
Tesco Express, Horton Retail Centre, Epsom	200	95%	190	12,911	2.5	5.1	2.6
Sub-total, other stores in Epsom & Ewell (excluding local shops)	5,741	-	4,177	-	50.0	94.3	44.3
Total for Borough	**11,562**		**9,451**	**11,437**	**108.1**	**191.9**	**83.8**

Table 10 - Commitments for new convenience goods retail floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated convenience A1 floorspace (%)	Estimated convenience A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2019	Estimated turnover 2022	Estimated turnover 2027	Estimated turnover 2032
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	80%	1,142	12,000	13.7	13.8	13.2	13.3

Based on assumed company average sales floorspace split of 80% convenience / 20% comparison

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)

Lidl Sales Density based on performance of a main food convenience/supermarket operator, and reflective of performance of discount operators within this catchment

Table 11 - Borough-wide convenience goods floorspace capacity - Scenario 1

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	191.9	196.2	190.0	194.7
Existing convenience shop floorspace within Epsom & Ewell Borough (sq.m net)	9,451	9,451	9,451	9,451
Sales per sq.m net £	20,307	11,556	11,052	11,108
Sales from existing floorspace (£m)	191.9	109.2	104.5	105.0
Sales from committed floorspace (£m)	0.0	13.8	13.2	13.3
Residual spending to support new convenience goods floorspace (£m)	0.0	73.2	72.3	76.4
Sales per sq.m net in new shops (£)	12,000	12,125	11,597	11,655
Capacity for new floorspace (sq.m net)	**0**	**6,036**	**6,237**	**6,553**
Capacity for new floorspace (sq.m net, rounded)	**0**	**6,000**	**6,200**	**6,600**

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)

Table 12 - Borough-wide convenience goods floorspace capacity Scenario 2

[Based on borough spend only supporting new borough floorspace]

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	141.3	144.7	140.5	144.1
Existing convenience shop floorspace within Epsom & Ewell Borough (sq.m net)	9,451	9,451	9,451	9,451
Sales per sq.m net £	14,948	11,556	11,052	11,108
Sales from existing floorspace (£m)	141.3	109.2	104.5	105.0
Sales from committed floorspace (£m)	0.0	13.8	13.2	13.3
Residual spending to support new convenience goods floorspace (£m)	0.0	21.6	22.8	25.9
Sales per sq.m net in new shops (£)	12,000	12,125	11,597	11,655
Capacity for new floorspace (sq.m net)	**0**	**1,784**	**1,963**	**2,219**
Capacity for new floorspace (sq.m net, rounded)	**0**	**1,800**	**2,000**	**2,200**

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)

Appendix 2

Comparison Goods Floorspace Need Economic Update August 2025

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	*60,784*	*61,958*	*78,034*	*19,056*	*15,653*	*17,212*	*18,189*	*24,738*	*31,570*	*32,419*	*32,893*	*100,776*	***493,282***
2019	62,698	63,779	80,649	19,582	16,081	17,681	18,723	25,329	32,301	33,500	33,854	104,296	**508,473**
2022	65,073	66,003	83,570	20,149	16,611	18,246	19,268	25,798	32,778	34,513	34,616	107,740	**524,365**
2027	68,846	69,322	87,711	21,079	17,453	19,181	20,076	26,588	33,590	36,140	35,785	112,941	**548,712**
2032	72,101	72,253	91,311	21,974	18,235	19,869	20,823	27,335	34,457	37,514	36,831	117,436	**570,139**
Change 2019-32	***9,403***	***8,474***	***10,662***	***2,392***	***2,154***	***2,188***	***2,100***	***2,006***	***2,156***	***4,014***	***2,977***	***13,140***	***61,666***

Source: *Experian Micromarketer (2017-based population forecasts)*

Table 1a - Survey area postcode sectors

Zone	Postal Sectors
Zone 1	KT17 1/3/4 - KT18 5/7 - KT19 7/8/9
Zone 2	KT4 7/8 - KT17 2 - KT19 0 - SM2 7 - SM3 8
Zone 3	SM1 1/2/3/4 - SM2 5/6 - SM3 9
Zone 4	SM7 1/2/3
Zone 5	CR5 3 - KT20 6
Zone 6	KT20 7 - RH2 0/9
Zone 7	KT18 6 - KT20 5 - KT22 8
Zone 8	KT21 1/2 - KT22 0/7
Zone 9	KT11 2/3 - KT22 9 - KT23 3/4
Zone 10	KT9 1/2 - KT10 0
Zone 11	KT7 0 - KT8 0/2 - KT10 8/9
Zone 12	KT3 5/6 - KT5 8/9 - KT6 4/5/6/7 - SM4 4 - SW20 9

Table 2 - Survey area per capita expenditure forecasts, comparison goods

	Expenditure per capita (£)	SFT (%) (Experian)	SFT (£)	Expenditure per capita less SFT
2019	4,927	32.8%	1,616	3,311
2022	4,989	37.8%	1,886	3,103
2027	4,970	41.1%	2,043	2,927
2032	5,628	42.7%	2,403	3,225

Expenditure growth rates: 2020: -8.3%; 2021: 6.8%; 2022: 3.4%; 2023: -3.2%; 2024: -1.0%; 2025: 0.1%; 2026: 1.3%; 2027-2031: 2.5%; 2031-2032: 2.6% (Experian Retail Planner Briefing Note 22, March 2025)

Source: SFT / Internet Sales are sourced from locally calculated rates as identified in the Household Telephone Survey (August 2019)

Table 3 - Survey area retail expenditure, comparison goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2019	207.59	211.17	267.02	64.83	53.24	58.54	61.99	83.86	106.95	110.92	112.09	345.32	**1,683.53**
2022	201.95	204.83	259.35	62.53	51.55	56.62	59.80	80.06	101.72	107.11	107.43	334.36	**1,627.30**
2027	201.52	202.91	256.74	61.70	51.09	56.14	58.76	77.83	98.32	105.79	104.75	330.59	**1,606.13**
2032	232.52	233.01	294.47	70.86	58.81	64.08	67.15	88.15	111.12	120.98	118.78	378.72	**1,838.65**
Change 2019-32	*24.93*	*21.84*	*27.45*	*6.03*	*5.56*	*5.54*	*5.16*	*4.29*	*4.17*	*10.06*	*6.69*	*33.40*	***155.13***

Source: Tables 1 & 2

Table 4 - Comparison goods % market share allocation (2019)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Comparison goods floorspace in Epsom & Ewell Borough												
Town centres												
Epsom town centre (zone 1)	37.29%	14.06%	1.04%	13.89%	5.62%	7.05%	27.68%	21.36%	4.91%	4.61%	2.00%	1.12%
District centres												
Ewell Village (zone 1)	0.86%	1.40%	0.03%	0.00%	0.00%	0.00%	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%
Stoneleigh (Broadway) (zone 2)	0.22%	2.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total	*1.08%*	*3.53%*	*0.03%*	*0.00%*	*0.00%*	*0.00%*	*0.32%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*
Local centres												
All local centres in Epsom & Ewell Borough (zones 1/2)	1.00%	0.84%	0.00%	0.13%	1.40%	0.00%	0.23%	0.00%	0.05%	0.00%	0.00%	0.00%
Out-of-centre												
Kiln Lane retail warehousing, Epsom	2.50%	1.07%	0.00%	0.66%	0.47%	0.96%	0.75%	0.53%	0.32%	0.04%	0.00%	0.00%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	8.52%	1.68%	0.00%	0.87%	0.00%	0.20%	0.71%	0.52%	0.00%	2.12%	0.00%	0.28%
Homebase, Reigate Road, Ewell	2.87%	1.90%	0.04%	0.82%	2.73%	0.15%	1.26%	0.05%	0.06%	0.37%	0.06%	0.00%
Sub-total	*13.89%*	*4.64%*	*0.04%*	*2.36%*	*3.20%*	*1.31%*	*2.72%*	*1.10%*	*0.38%*	*2.54%*	*0.06%*	*0.28%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**53.26%**	**23.06%**	**1.11%**	**16.38%**	**10.22%**	**8.36%**	**30.95%**	**22.47%**	**5.34%**	**7.15%**	**2.06%**	**1.40%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)												
Town centres												
Worcester Park district centre (zone 2)	0.00%	3.97%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.27%
Cheam district centre (zone 2)	0.16%	2.75%	1.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sutton town centre (zone 3)	1.95%	17.61%	45.16%	17.74%	11.27%	0.53%	1.87%	3.93%	0.98%	0.78%	0.00%	6.94%
Banstead town centre (zone 4)	0.49%	0.40%	0.00%	17.82%	6.80%	0.59%	2.09%	0.12%	0.00%	0.00%	0.00%	0.11%
Reigate town centre (zone 5)	0.22%	0.06%	0.14%	1.41%	2.06%	29.16%	1.77%	0.17%	1.52%	0.00%	0.00%	0.11%
Leatherhead town centre (zone 7)	0.34%	0.00%	0.00%	0.59%	0.00%	0.13%	10.81%	12.82%	11.13%	0.00%	0.00%	0.00%
Ashtead village centre (zone 8)	0.20%	0.00%	0.00%	0.09%	0.00%	0.00%	1.22%	12.90%	1.15%	0.00%	0.00%	0.00%
Bookham district centre (zone 9)	0.00%	0.00%	0.30%	0.00%	0.33%	0.00%	0.00%	0.00%	5.58%	0.00%	0.00%	0.00%
Cobham town centre (zone 9)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%	1.62%	5.89%	0.00%	1.45%	0.49%
Esher town centre (zone 11)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	2.02%	3.68%	0.00%
Surbiton town centre (zone 12)	0.00%	0.00%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	4.00%	4.60%	6.19%
Other town centres within survey area (outside Epsom & Ewell Borough)	1.31%	0.80%	0.00%	0.64%	1.96%	2.29%	2.57%	1.87%	2.40%	4.85%	5.25%	0.82%
Out-of-centre / retail warehousing												
B&Q, Sutton Court Road, Sutton (zone 3)	0.45%	1.52%	3.35%	3.33%	1.56%	0.19%	1.06%	0.05%	0.00%	0.00%	0.00%	0.31%
Sainsbury's, London Road, North Cheam (zone 3)	0.00%	2.86%	1.18%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.98%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.00%	1.13%	2.66%	0.00%	0.11%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Reigate Road, Burgh Heath (zone 7)	1.49%	0.00%	0.17%	2.76%	6.23%	0.87%	5.88%	0.34%	0.56%	0.32%	0.00%	0.00%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	0.61%	0.00%	0.95%	0.08%	0.38%	3.04%	1.77%	5.83%	5.50%	2.09%	0.30%	0.04%
Sub-total, other comparison goods floorspace in survey area (B)	**7.22%**	**31.10%**	**55.20%**	**44.62%**	**30.71%**	**36.80%**	**29.73%**	**39.76%**	**34.79%**	**14.07%**	**15.27%**	**16.27%**
Comparison goods floorspace outside survey area												
Town centres												
Kingston-upon-Thames town centre	20.36%	24.07%	9.53%	10.93%	7.10%	3.80%	13.43%	16.63%	13.60%	51.98%	54.66%	40.48%
Guildford town centre	1.05%	0.17%	0.00%	1.89%	0.32%	3.34%	5.40%	5.24%	28.32%	1.09%	1.14%	0.55%
Central London / City of London	1.82%	1.21%	0.38%	1.95%	3.21%	1.46%	3.41%	2.06%	0.09%	1.10%	4.26%	1.21%
Croydon town centre	0.35%	0.65%	0.90%	4.11%	7.53%	0.77%	1.08%	0.62%	0.00%	0.00%	0.00%	0.36%
Redhill town centre	0.24%	0.00%	0.00%	0.59%	2.56%	19.07%	0.94%	0.00%	0.16%	0.00%	0.00%	0.00%
Crawley town centre	0.06%	0.00%	0.00%	0.00%	0.75%	5.22%	1.30%	0.00%	0.20%	0.00%	0.65%	0.00%
Out-of-centre / retail warehousing												
Purley Way retail warehousing, Croydon	4.91%	4.61%	16.20%	12.45%	17.74%	4.65%	6.79%	2.79%	3.03%	1.33%	1.22%	4.08%
New Malden retail warehousing	7.38%	8.03%	4.19%	1.75%	0.85%	0.21%	1.04%	2.82%	0.87%	17.71%	7.75%	18.25%
Other	2.91%	5.90%	12.28%	4.86%	17.55%	15.42%	5.88%	7.61%	13.36%	4.45%	12.89%	17.19%
Sub-total, comparison goods floorspace outside survey area (C)	**39.07%**	**44.65%**	**43.49%**	**38.52%**	**57.61%**	**53.94%**	**39.28%**	**37.77%**	**59.64%**	**77.66%**	**82.58%**	**82.12%**
Local / other shops in survey area (D)	**0.45%**	**1.20%**	**0.20%**	**0.48%**	**1.46%**	**0.90%**	**0.04%**	**0.00%**	**0.24%**	**1.12%**	**0.08%**	**0.21%**
Overall total (A+B+C+D)	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research Telephone Survey, August 2019

Table 5a - Comparison goods spend (£m) 2019

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2019	**207.6**	**211.2**	**267.0**	**64.8**	**53.2**	**58.5**	**62.0**	**83.9**	**106.9**	**110.9**	**112.1**	**345.3**	**1,683.5**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	77.4	29.7	2.8	9.0	3.0	4.1	17.2	17.9	5.3	5.1	2.2	3.9	177.5	10.5%
District centres														
Ewell Village (zone 1)	1.8	3.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	5.0	0.3%
Stoneleigh (Broadway) (zone 2)	0.5	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
Sub-total	*2.2*	*7.4*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*10.0*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.1	1.8	0.0	0.1	0.7	0.0	0.1	0.0	0.1	0.0	0.0	0.0	4.9	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.2	2.3	0.0	0.4	0.3	0.6	0.5	0.4	0.3	0.0	0.0	0.0	10.0	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.7	3.5	0.0	0.6	0.0	0.1	0.4	0.4	0.0	2.4	0.0	1.0	26.1	1.5%
Homebase, Reigate Road, Ewell	6.0	4.0	0.1	0.5	1.5	0.1	0.8	0.0	0.1	0.4	0.1	0.0	13.5	0.8%
Sub-total	*28.8*	*9.8*	*0.1*	*1.5*	*1.7*	*0.8*	*1.7*	*0.9*	*0.4*	*2.8*	*0.1*	*1.0*	*49.6*	*2.9%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**110.6**	**48.7**	**3.0**	**10.6**	**5.4**	**4.9**	**19.2**	**18.8**	**5.7**	**7.9**	**2.3**	**4.8**	**242.0**	**14.4%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.3	0.6%
Cheam district centre (zone 2)	0.3	5.8	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.5%
Sutton town centre (zone 3)	4.1	37.2	120.6	11.5	6.0	0.3	1.2	3.3	1.0	0.9	0.0	23.9	210.0	12.5%
Banstead town centre (zone 4)	1.0	0.9	0.0	11.6	3.6	0.3	1.3	0.1	0.0	0.0	0.0	0.4	19.2	1.1%
Reigate town centre (zone 5)	0.5	0.1	0.4	0.9	1.1	17.1	1.1	0.1	1.6	0.0	0.0	0.4	23.3	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.7	10.7	11.9	0.0	0.0	0.0	30.5	1.8%
Ashtead village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.8	10.8	1.2	0.0	0.0	0.0	13.3	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	6.0	0.0	0.0	0.0	7.0	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.4	6.3	0.0	1.6	1.7	11.4	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.2	4.1	0.0	6.5	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.4	5.2	21.4	31.5	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.7	1.7	0.0	0.4	1.0	1.3	1.6	1.6	2.6	5.4	5.9	2.8	27.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.2	8.9	2.2	0.8	0.1	0.7	0.0	0.0	0.0	0.0	1.1	18.0	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	6.0	3.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	12.7	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.4	7.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.6	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.1	0.0	0.4	1.8	3.3	0.5	3.6	0.3	0.6	0.4	0.0	0.0	14.0	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.3	0.0	2.5	0.1	0.2	1.8	1.1	4.9	5.9	2.3	0.3	0.2	20.5	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**15.0**	**65.7**	**147.4**	**28.9**	**16.3**	**21.5**	**18.4**	**33.3**	**37.2**	**15.6**	**17.1**	**56.2**	**472.8**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	42.3	50.8	25.4	7.1	3.8	2.2	8.3	13.9	14.5	57.7	61.3	139.8	427.2	25.4%
Guildford town centre	2.2	0.4	0.0	1.2	0.2	2.0	3.3	4.4	30.3	1.2	1.3	1.9	48.3	2.9%
Central London / City of London	3.8	2.6	1.0	1.3	1.7	0.9	2.1	1.7	0.1	1.2	4.8	4.2	25.3	1.5%
Croydon town centre	0.7	1.4	2.4	2.7	4.0	0.4	0.7	0.5	0.0	0.0	0.0	1.2	14.1	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.4	11.2	0.6	0.0	0.2	0.0	0.0	0.0	14.2	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.1	0.8	0.0	0.2	0.0	0.7	0.0	5.3	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	10.2	9.7	43.3	8.1	9.4	2.7	4.2	2.3	3.2	1.5	1.4	14.1	110.1	6.5%
New Malden retail warehousing	15.3	16.9	11.2	1.1	0.5	0.1	0.6	2.4	0.9	19.6	8.7	63.0	140.5	8.3%
Other	6.0	12.5	32.8	3.2	9.3	9.0	3.6	6.4	14.3	4.9	14.5	59.4	175.9	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**81.1**	**94.3**	**116.1**	**25.0**	**30.7**	**31.6**	**24.3**	**31.7**	**63.8**	**86.1**	**92.6**	**283.6**	**960.8**	**57.1%**
Local / other shops in survey area (D)	0.9	2.5	0.5	0.3	0.8	0.5	0.0	0.0	0.3	1.2	0.1	0.7	8.0	0.5%
Overall total (A+B+C+D)	**207.6**	**211.2**	**267.0**	**64.8**	**53.2**	**58.5**	**62.0**	**83.9**	**106.9**	**110.9**	**112.1**	**345.3**	**1,683.5**	**100.0%**

Source: Table 3, Table 4

Table 5b - Comparison goods spend (£m) 2022

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2022	**201.9**	**204.8**	**259.3**	**62.5**	**51.6**	**56.6**	**59.8**	**80.1**	**101.7**	**107.1**	**107.4**	**334.4**	**1,627.3**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	75.3	28.8	2.7	8.7	2.9	4.0	16.6	17.1	5.0	4.9	2.1	3.8	171.8	10.6%
District centres														
Ewell Village (zone 1)	1.7	2.9	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
Stoneleigh (Broadway) (zone 2)	0.4	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.3%
Sub-total	*2.2*	*7.2*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*9.7*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.0	1.7	0.0	0.1	0.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	4.7	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.0	2.2	0.0	0.4	0.2	0.5	0.5	0.4	0.3	0.0	0.0	0.0	9.7	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.2	3.4	0.0	0.5	0.0	0.1	0.4	0.4	0.0	2.3	0.0	0.9	25.3	1.6%
Homebase, Reigate Road, Ewell	5.8	3.9	0.1	0.5	1.4	0.1	0.8	0.0	0.1	0.4	0.1	0.0	13.1	0.8%
Sub-total	*28.0*	*9.5*	*0.1*	*1.5*	*1.7*	*0.7*	*1.6*	*0.9*	*0.4*	*2.7*	*0.1*	*0.9*	*48.1*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**107.5**	**47.2**	**2.9**	**10.2**	**5.3**	**4.7**	**18.5**	**18.0**	**5.4**	**7.7**	**2.2**	**4.7**	**234.4**	**14.4%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.0	0.6%
Cheam district centre (zone 2)	0.3	5.6	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.9	0.5%
Sutton town centre (zone 3)	3.9	36.1	117.1	11.1	5.8	0.3	1.1	3.1	1.0	0.8	0.0	23.2	203.6	12.5%
Banstead town centre (zone 4)	1.0	0.8	0.0	11.1	3.5	0.3	1.2	0.1	0.0	0.0	0.0	0.4	18.5	1.1%
Reigate town centre (zone 5)	0.4	0.1	0.4	0.9	1.1	16.5	1.1	0.1	1.5	0.0	0.0	0.4	22.5	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.5	10.3	11.3	0.0	0.0	0.0	29.2	1.8%
Ashtead village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.7	10.3	1.2	0.0	0.0	0.0	12.7	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	5.7	0.0	0.0	0.0	6.6	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.3	6.0	0.0	1.6	1.6	10.9	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.2	3.9	0.0	6.2	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.3	4.9	20.7	30.4	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.6	1.6	0.0	0.4	1.0	1.3	1.5	1.5	2.4	5.2	5.6	2.7	26.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.1	8.7	2.1	0.8	0.1	0.6	0.0	0.0	0.0	0.0	1.0	17.4	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	5.9	3.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	12.3	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.3	6.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.0	0.0	0.4	1.7	3.2	0.5	3.5	0.3	0.6	0.3	0.0	0.0	13.6	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.2	0.0	2.5	0.0	0.2	1.7	1.1	4.7	5.6	2.2	0.3	0.1	19.7	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**14.6**	**63.7**	**143.2**	**27.9**	**15.8**	**20.8**	**17.8**	**31.8**	**35.4**	**15.1**	**16.4**	**54.4**	**456.9**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	41.1	49.3	24.7	6.8	3.7	2.2	8.0	13.3	13.8	55.7	58.7	135.3	412.7	25.4%
Guildford town centre	2.1	0.4	0.0	1.2	0.2	1.9	3.2	4.2	28.8	1.2	1.2	1.9	46.2	2.8%
Central London / City of London	3.7	2.5	1.0	1.2	1.7	0.8	2.0	1.6	0.1	1.2	4.6	4.0	24.4	1.5%
Croydon town centre	0.7	1.3	2.3	2.6	3.9	0.4	0.6	0.5	0.0	0.0	0.0	1.2	13.6	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.3	10.8	0.6	0.0	0.2	0.0	0.0	0.0	13.7	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.0	0.8	0.0	0.2	0.0	0.7	0.0	5.1	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	9.9	9.4	42.0	7.8	9.1	2.6	4.1	2.2	3.1	1.4	1.3	13.6	106.7	6.6%
New Malden retail warehousing	14.9	16.4	10.9	1.1	0.4	0.1	0.6	2.3	0.9	19.0	8.3	61.0	136.0	8.4%
Other	5.9	12.1	31.8	3.0	9.0	8.7	3.5	6.1	13.6	4.8	13.9	57.5	169.9	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**78.9**	**91.5**	**112.8**	**24.1**	**29.7**	**30.5**	**23.5**	**30.2**	**60.7**	**83.2**	**88.7**	**274.6**	**928.3**	**57.0%**
Local / other shops in survey area (D)	0.9	2.5	0.5	0.3	0.8	0.5	0.0	0.0	0.2	1.2	0.1	0.7	7.7	0.5%
Overall total (A+B+C+D)	**201.9**	**204.8**	**259.3**	**62.5**	**51.6**	**56.6**	**59.8**	**80.1**	**101.7**	**107.1**	**107.4**	**334.4**	**1,627.3**	**100.0%**

Source: Table 3, Table 4

Table 5c - Comparison goods spend (£m) 2027

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2027	**201.5**	**202.9**	**256.7**	**61.7**	**51.1**	**56.1**	**58.8**	**77.8**	**98.3**	**105.8**	**104.7**	**330.6**	**1,606.1**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	75.1	28.5	2.7	8.6	2.9	4.0	16.3	16.6	4.8	4.9	2.1	3.7	170.1	10.6%
District centres														
Ewell Village (zone 1)	1.7	2.8	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
Stoneleigh (Broadway) (zone 2)	0.4	4.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.3%
Sub-total	*2.2*	*7.2*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*9.6*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.0	1.7	0.0	0.1	0.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	4.7	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.0	2.2	0.0	0.4	0.2	0.5	0.4	0.4	0.3	0.0	0.0	0.0	9.6	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.2	3.4	0.0	0.5	0.0	0.1	0.4	0.4	0.0	2.2	0.0	0.9	25.2	1.6%
Homebase, Reigate Road, Ewell	5.8	3.8	0.1	0.5	1.4	0.1	0.7	0.0	0.1	0.4	0.1	0.0	13.0	0.8%
Sub-total	*28.0*	*9.4*	*0.1*	*1.5*	*1.6*	*0.7*	*1.6*	*0.9*	*0.4*	*2.7*	*0.1*	*0.9*	*47.8*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**107.3**	**46.8**	**2.9**	**10.1**	**5.2**	**4.7**	**18.2**	**17.5**	**5.2**	**7.6**	**2.2**	**4.6**	**232.3**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.0	0.6%
Cheam district centre (zone 2)	0.3	5.6	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.8	0.5%
Sutton town centre (zone 3)	3.9	35.7	115.9	10.9	5.8	0.3	1.1	3.1	1.0	0.8	0.0	22.9	201.5	12.5%
Banstead town centre (zone 4)	1.0	0.8	0.0	11.0	3.5	0.3	1.2	0.1	0.0	0.0	0.0	0.4	18.3	1.1%
Reigate town centre (zone 5)	0.4	0.1	0.3	0.9	1.1	16.4	1.0	0.1	1.5	0.0	0.0	0.4	22.2	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.4	10.0	10.9	0.0	0.0	0.0	28.4	1.8%
Ashtead village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.7	10.0	1.1	0.0	0.0	0.0	12.3	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	5.5	0.0	0.0	0.0	6.4	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.3	5.8	0.0	1.5	1.6	10.6	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.1	3.9	0.0	6.1	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.2	4.8	20.5	30.0	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.6	1.6	0.0	0.4	1.0	1.3	1.5	1.5	2.4	5.1	5.5	2.7	25.6	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.1	8.6	2.1	0.8	0.1	0.6	0.0	0.0	0.0	0.0	1.0	17.3	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	5.8	3.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	12.2	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.3	6.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.0	0.0	0.4	1.7	3.2	0.5	3.5	0.3	0.6	0.3	0.0	0.0	13.4	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.2	0.0	2.4	0.0	0.2	1.7	1.0	4.5	5.4	2.2	0.3	0.1	19.3	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**14.6**	**63.1**	**141.7**	**27.5**	**15.7**	**20.7**	**17.5**	**30.9**	**34.2**	**14.9**	**16.0**	**53.8**	**450.5**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	41.0	48.8	24.5	6.7	3.6	2.1	7.9	12.9	13.4	55.0	57.3	133.8	407.1	25.3%
Guildford town centre	2.1	0.4	0.0	1.2	0.2	1.9	3.2	4.1	27.8	1.2	1.2	1.8	45.0	2.8%
Central London / City of London	3.7	2.5	1.0	1.2	1.6	0.8	2.0	1.6	0.1	1.2	4.5	4.0	24.1	1.5%
Croydon town centre	0.7	1.3	2.3	2.5	3.8	0.4	0.6	0.5	0.0	0.0	0.0	1.2	13.5	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.3	10.7	0.6	0.0	0.2	0.0	0.0	0.0	13.6	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	2.9	0.8	0.0	0.2	0.0	0.7	0.0	5.1	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	9.9	9.4	41.6	7.7	9.1	2.6	4.0	2.2	3.0	1.4	1.3	13.5	105.5	6.6%
New Malden retail warehousing	14.9	16.3	10.8	1.1	0.4	0.1	0.6	2.2	0.9	18.7	8.1	60.3	134.4	8.4%
Other	5.9	12.0	31.5	3.0	9.0	8.7	3.5	5.9	13.1	4.7	13.5	56.8	167.5	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**78.7**	**90.6**	**111.7**	**23.8**	**29.4**	**30.3**	**23.1**	**29.4**	**58.6**	**82.2**	**86.5**	**271.5**	**915.7**	**57.0%**
Local / other shops in survey area (D)	0.9	2.4	0.5	0.3	0.7	0.5	0.0	0.0	0.2	1.2	0.1	0.7	7.6	0.5%
Overall total (A+B+C+D)	**201.5**	**202.9**	**256.7**	**61.7**	**51.1**	**56.1**	**58.8**	**77.8**	**98.3**	**105.8**	**104.7**	**330.6**	**1,606.1**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Table 5d - Comparison goods spend (£m) 2032

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2032	**232.5**	**233.0**	**294.5**	**70.9**	**58.8**	**64.1**	**67.2**	**88.2**	**111.1**	**121.0**	**118.8**	**378.7**	**1,838.7**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	86.7	32.8	3.1	9.8	3.3	4.5	18.6	18.8	5.5	5.6	2.4	4.3	195.3	10.6%
District centres														
Ewell Village (zone 1)	2.0	3.3	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	5.6	0.3%
Stoneleigh (Broadway) (zone 2)	0.5	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	0.3%
Sub-total	*2.5*	*8.2*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*11.0*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.3	1.9	0.0	0.1	0.8	0.0	0.2	0.0	0.1	0.0	0.0	0.0	5.4	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.8	2.5	0.0	0.5	0.3	0.6	0.5	0.5	0.4	0.1	0.0	0.0	11.0	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	19.8	3.9	0.0	0.6	0.0	0.1	0.5	0.5	0.0	2.6	0.0	1.0	29.0	1.6%
Homebase, Reigate Road, Ewell	6.7	4.4	0.1	0.6	1.6	0.1	0.8	0.0	0.1	0.4	0.1	0.0	15.0	0.8%
Sub-total	*32.3*	*10.8*	*0.1*	*1.7*	*1.9*	*0.8*	*1.8*	*1.0*	*0.4*	*3.1*	*0.1*	*1.0*	*55.0*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**123.8**	**53.7**	**3.3**	**11.6**	**6.0**	**5.4**	**20.8**	**19.8**	**5.9**	**8.6**	**2.5**	**5.3**	**266.7**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	10.3	0.6%
Cheam district centre (zone 2)	0.4	6.4	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	0.6%
Sutton town centre (zone 3)	4.5	41.0	133.0	12.6	6.6	0.3	1.3	3.5	1.1	0.9	0.0	26.3	231.1	12.6%
Banstead town centre (zone 4)	1.1	0.9	0.0	12.6	4.0	0.4	1.4	0.1	0.0	0.0	0.0	0.4	21.0	1.1%
Reigate town centre (zone 5)	0.5	0.1	0.4	1.0	1.2	18.7	1.2	0.2	1.7	0.0	0.0	0.4	25.4	1.4%
Leatherhead town centre (zone 7)	0.8	0.0	0.0	0.4	0.0	0.1	7.3	11.3	12.4	0.0	0.0	0.0	32.2	1.8%
Ashtead village centre (zone 8)	0.5	0.0	0.0	0.1	0.0	0.0	0.8	11.4	1.3	0.0	0.0	0.0	14.0	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.9	0.0	0.2	0.0	0.0	0.0	6.2	0.0	0.0	0.0	7.3	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.4	6.5	0.0	1.7	1.9	12.0	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.4	4.4	0.0	6.9	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.1	4.8	5.5	23.5	34.3	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.0	1.9	0.0	0.5	1.2	1.5	1.7	1.6	2.7	5.9	6.2	3.1	29.2	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.1	3.5	9.9	2.4	0.9	0.1	0.7	0.0	0.0	0.0	0.0	1.2	19.8	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	6.7	3.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	13.9	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.6	7.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.5	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.5	0.0	0.5	2.0	3.7	0.6	3.9	0.3	0.6	0.4	0.0	0.0	15.4	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.4	0.0	2.8	0.1	0.2	1.9	1.2	5.1	6.1	2.5	0.4	0.2	21.9	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**16.8**	**72.5**	**162.6**	**31.6**	**18.1**	**23.6**	**20.0**	**35.1**	**38.7**	**17.0**	**18.1**	**61.6**	**515.5**	**28.0%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	47.3	56.1	28.1	7.7	4.2	2.4	9.0	14.7	15.1	62.9	64.9	153.3	465.7	25.3%
Guildford town centre	2.5	0.4	0.0	1.3	0.2	2.1	3.6	4.6	31.5	1.3	1.4	2.1	51.0	2.8%
Central London / City of London	4.2	2.8	1.1	1.4	1.9	0.9	2.3	1.8	0.1	1.3	5.1	4.6	27.6	1.5%
Croydon town centre	0.8	1.5	2.7	2.9	4.4	0.5	0.7	0.5	0.0	0.0	0.0	1.4	15.4	0.8%
Redhill town centre	0.6	0.0	0.0	0.4	1.5	12.2	0.6	0.0	0.2	0.0	0.0	0.0	15.5	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.3	0.9	0.0	0.2	0.0	0.8	0.0	5.8	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	11.4	10.7	47.7	8.8	10.4	3.0	4.6	2.5	3.4	1.6	1.4	15.4	121.0	6.6%
New Malden retail warehousing	17.2	18.7	12.4	1.2	0.5	0.1	0.7	2.5	1.0	21.4	9.2	69.1	154.0	8.4%
Other	6.8	13.8	36.2	3.4	10.3	9.9	3.9	6.7	14.8	5.4	15.3	65.1	191.6	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**90.9**	**104.0**	**128.1**	**27.3**	**33.9**	**34.6**	**26.4**	**33.3**	**66.3**	**94.0**	**98.1**	**311.0**	**1,047.7**	**57.0%**
Local / other shops in survey area (D)	1.0	2.8	0.6	0.3	0.9	0.6	0.0	0.0	0.3	1.4	0.1	0.8	8.7	0.5%
Overall total (A+B+C+D)	**232.5**	**233.0**	**294.5**	**70.9**	**58.8**	**64.1**	**67.2**	**88.2**	**111.1**	**121.0**	**118.8**	**378.7**	**1,838.7**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021
Comparison Floorspace Need
Including Economic Update August 2025

Table 6 - Schedule of comparison goods floorspace

In-centre floorspace	Comparison goods floorspace (sq.m net)
Epsom town centre	
Comparison goods retail units	20,896
Comparison goods floorspace at upper floors	5,737
Non-food floorspace in supermarkets	221
Sub-total for Epsom town centre	*26,854*
Ewell district centre	
Comparison goods retail units	1,530
Non-food floorspace in supermarkets	24
Sub-total for Ewell district centre	*1,554*
Stoneleigh district centre	
Comparison goods retail units	1,710
Non-food floorspace in supermarkets	26
Sub-total for Stoneleigh district centre	*1,736*
Local centres	
Non-food floorspace in supermarkets	276
Total in-centre floorspace	**30,420**
Edge/Out-of-centre floorspace	**Comparison goods floorspace (sq.m net)**
Majestic Wine, East Street, Epsom	223
Wickes, Kiln Lane, Epsom	2,519
Halfords, Kiln Lane, Epsom	743
Sainsbury's, Kiln Lane, Epsom (non-food floorspace, inc. Argos and Habitat concessions)	1,532
Other	32
Total edge/out-of-centre floorspace	**5,049**
Overall total	**35,469**

Source: Experian Goad Category Reports / Goad Plans / Previous Evidence Base

Table 7 - Commitments for new comparison goods floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated comparison A1 floorspace (%)	Estimated comparison A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2019	Estimated turnover 2022	Estimated turnover 2027	Estimated turnover 2032
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	20%	285	2,500	0.7	0.7	0.7	0.8
Total	-	-	-	-	-	-	**0.7**	**0.7**	**0.7**	**0.8**

Notes to turnover assumptions

1 - Based on assumed company average sales floorspace split of 80% convenience / 20% comparison

Table 8a - Epsom town centre floorspace need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	11	11	11	11
Comparison goods spending in Epsom town centre (£m)	177.5	171.8	170.1	195.3
Total comparison goods spending (£m)	**177.5**	**171.8**	**170.1**	**195.3**
Existing Retail Floorspace (sq.m net)	26,854	26,854	26,854	26,854
Sales per sqm net (£)	6,611	6,377	6,641	7,514
Sales from Existing Floorspace (£m)	177.5	171.3	178.3	201.8
Sales from Committed Floorspace (£m)	0.0	0.7	0.7	0.8
Residual Spending to support new floorspace (£000)	0.0	-0.1	-9.0	-7.4
Sales per sq m net in new shops (£)*	8,000	7,717	7,526	8,515
Capacity for new floorspace (sqm net)	0	-16	-1,190	-865
Capacity for new floorspace (sq.m net, rounded)	**0**	**0**	**-1,200**	**-900**

Table 8b - Ewell Village district centre floorspace need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	0.3	0.3	0.3	0.3
Comparison goods spending in Ewell Village district centre (£m)	5.0	4.7	4.9	5.6
Total comparison goods spending (£m)	**5.0**	**4.7**	**4.9**	**5.6**
Existing Retail Floorspace (sq.m net)	1,554	1,554	1,554	1,554
Sales per sqm net (£)	3,240	3,486	3,963	4,440
Sales from Existing Floorspace (£m)	5.0	5.4	6.2	6.9
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	-0.7	-1.3	-1.3
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-260	-427	-385
Capacity for new floorspace (sq.m net, rounded)	**0**	**-300**	**-400**	**-400**

Table 8c - Stoneleigh district centre floorspace capacity

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	0.3	0.3	0.3	0.3
Comparison goods spending in Stoneleigh district centre (£m)	4.9	4.8	4.8	5.5
Total comparison goods spending (£m)	**4.9**	**4.8**	**4.8**	**5.5**
Existing Retail Floorspace (sq.m net)	1,736	1,736	1,736	1,736
Sales per sqm net (£)	2,849	3,065	3,485	3,904
Sales from Existing Floorspace (£m)	4.9	5.3	6.0	6.8
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	-0.5	-1.3	-1.3
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-194	-423	-383
Capacity for new floorspace (sq.m net, rounded)	**0**	**-200**	**-400**	**-400**

Grant Mills Wood
chartered surveyors

SITE INTENSIFICATION FEASIBILITY REPORT

PREPARED BY GRANT MILLS WOOD

IN RESPECT OF

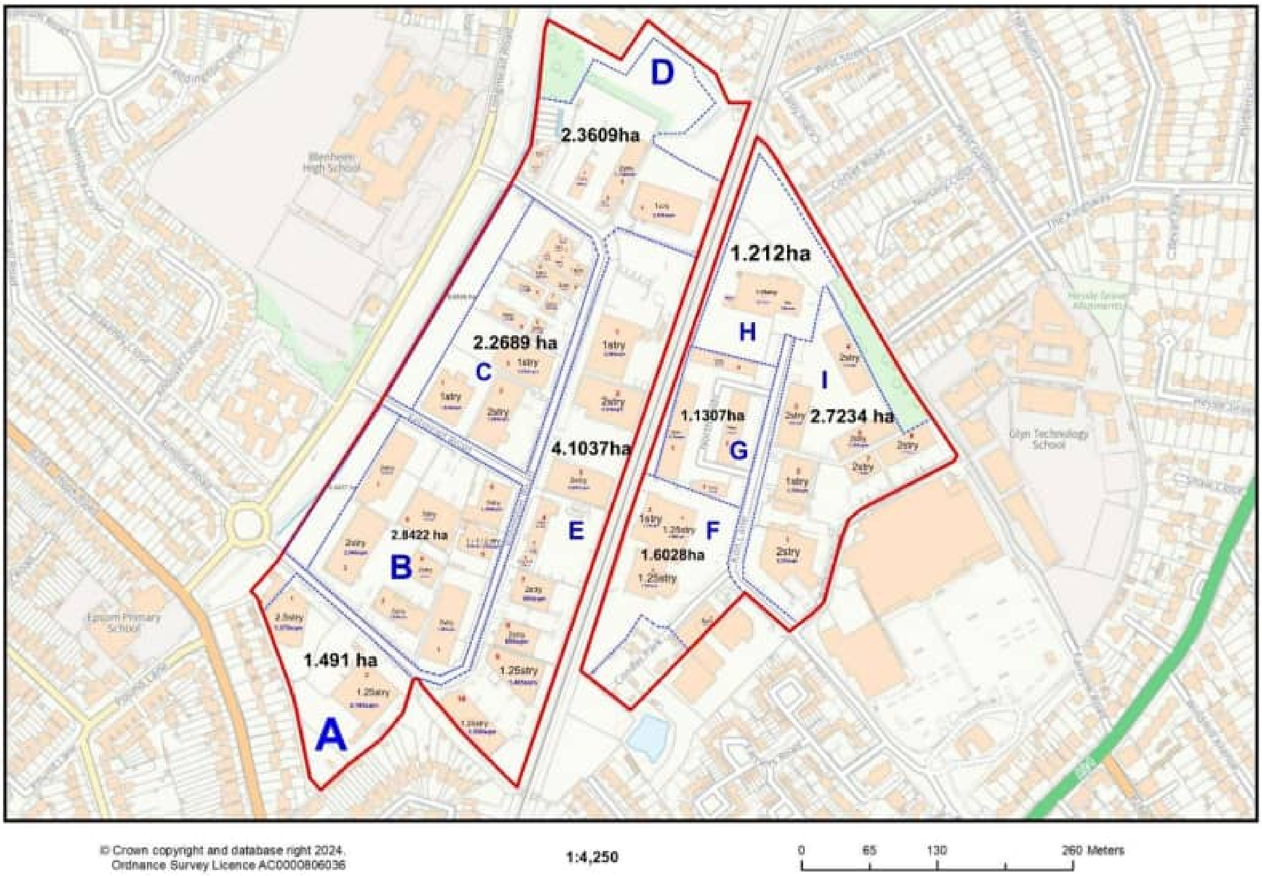
Kiln Lane & Longmead
Industrial Estates
Epsom and Ewell Borough Council

ON BEHALF OF

Epsom and Ewell Borough Council

SEPTEMBER 2025

Site Outline



- Approximate Site Boundary

CONTENTS

APPENDICES

1.0 INTRODUCTION AND SCOPE OF REPORT

1.1. Grant Mills Wood

1.1.1. Grant Mills Wood (GMW) is a long-established firm of Chartered Surveyors. We specialise in the business space property sector with a particular emphasis upon the industrial and warehouse sectors within Greater London and the Home Counties. The firm has extensive agency departments dealing with the acquisition, sale, and letting of 'B' and 'E' Class property. We are regularly instructed to advise on employment land supply and demand issues, both for the private and public sectors. This includes the preparation of reports and giving expert evidence upon Employment Land issues at Public Inquiries.

1.1.2. The firm is not closely linked with any particular developer, and, in view of its independence, we are regularly instructed to produce Employment Land Studies. Grant Mills Wood is a winner of multiple industrial property awards.

1.2. Scope of Instructions and Background Context

1.2.1. We are instructed by Epsom and Ewell Borough Council to prepare a Site Intensification Feasibility Report to demonstrate the scale of intensification that could be reasonably delivered upon parcels A, D, G, and H.

1.2.2. The plan at **Appendix 1** identifies parcels A, D, G, and H. A location plan is found at **Appendix 2**.

1.2.3. We set out below the scope of our instructions for this Statement:-

a) We will provide a high-level summary of the Epsom and Ewell industrial and warehousing market, including commentary on its strategic importance, the principal market drivers, its relationship to wider sub-regional markets, and prevailing demand and supply dynamics.

b) Undertake a focused assessment and summary of the existing provision of industrial accommodation within the designated parcels of Kiln Lane and Longmead Industrial Estates, including associated demand and supply considerations.

c) Undertake an assessment of new and recently consented industrial and warehousing schemes within the surrounding Boroughs, including analysis of site density and site coverage, together with consideration of associated supply and demand dynamics.

d) Following analysis of the existing provision of industrial and warehouse accommodation both on site and on competing schemes, provide commentary on the scale of intensification that could reasonably be achieved across each identified parcel, with reference to site density, potential floorspace delivery, and the type of units capable of being accommodated.

1.2.4. We address these points under appropriate side headings below before reaching our Conclusions in Section 6.0.

1.2.5. In September 2020, the Use Classes order was amended to reflect the need for some buildings to be repurposed, given changes in occupier requirements. Use Classes A, B1 (a, b, c), and D have been revoked and replaced with Class E. This means that B1c (light industrial process which can be carried out in a residential area) is now found under the more flexible E Class. B2 and B8 uses have remained unchanged. In regard to offices these are now found under Class E(g). Within this report, there may be references to B1 space, given that some industry reports we have researched have historically used this designation.

2.0 SUMMARY OF EPSOM INDUSTRIAL AND WAREHOUSING MARKET

Epsom and Ewell is a Borough in Surrey to the South of Central London, within the M25 orbital motorway. The Borough is well served by road access with the A24 and Junction 9 of the M25 motorway in close proximity. The Borough is also well served by public transport, with Epsom and Ewell West railway stations providing frequent services to London Waterloo, London Victoria, and London Bridge.

The majority of Epsom and Ewell industrial accommodation is provided within Kiln Lane and Longmead Industrial Estates, located to the north of Epsom Town Centre and within close proximity to the A24. Access for Heavy Goods Vehicles is gained via the A3 and M25 via Malden Rushett junction. The Kiln Lane and Longmead Industrial Estates are separated by a railway line, with no immediate vehicular access directly between the two areas. The surrounding area is largely low-density residential, however, it also includes educational and care home uses.

The Kiln Lane Industrial Site encompasses approximately 15 hectares (to the east of the railway line), and Longmead Industrial Estate approximately 20 hectares (west of the railway line). Longmead Industrial Estate comprises a range of industrial and warehouse units of differing sizes. Kiln Lane is more varied, with a number of small business park clusters of industrial units, car dealership units, and larger retail units, including those of Sainsbury's and Wickes. Ownership across the two sites is varied, consisting of; freeholds owned by EEBC, Long Leaseholds sold by EEBC, privately owned, and sites owned by Surrey County Council. The majority of occupiers across the estates comprise a mix of national and local trade operators, motor trade businesses, and local/regional businesses.

The Valuation Office Agency reported a total of 263,854.85 sq m (2,840,110 sq ft) of Non-domestic floor area in the Borough as of August 2025. Of this total, 72,205.08 sq m (777,209 sq ft) comprises industrial accommodation, 124,122.27 sq m (1,336,041 sq ft) of retail accommodation, and 67,527.50 sq m (726,860 sq ft) of office accommodation.

Further analysis of the VOA non-domestic floor areas using EG Radius Analytics highlights a total of 70,821.66 sq m (762,318 sq ft) within the Longmead and Kiln Lane Industrial Estates, of which 52,673.05 sq m (566,968 sq ft) comprises industrial accommodation, 17,409.75 sq m (187,397 sq ft) of retail accommodation, and 738.86 sq m (7,953 sq ft) of office accommodation.

The Longmead and Kiln Lane Industrial Estates Economic Value Report 2022 found that 126 companies were located on the Longmead and Kiln Lane industrial Estates, of which 92 were head offices and 34 were trading addresses within the geographical area. The report also highlighted that the most prevalent sectors on the estates comprised of Wholesale and trail trade/repair of motor vehicles and motorcycles (25.4% of the total), Manufacturing (17.5% of the total), Information and Communication (10.3% of the total), and Construction (8.7% of the total).

Analysis of total take-up on Longmead and Kiln Lane Industrial Estates highlights that over the past five years, industrial take-up equated to 120,345 sq ft, almost entirely through lettings (c.117,359 sq ft across 18 transactions or an average of 6,685 sq ft per letting) with only one small occupational sale recorded. Transaction volumes have reduced significantly in recent years following disproportionate growth off the back of the COVID-19 e-commerce boom, with take-up over the last three years (35,351 sq ft across five lettings) down 81% compared with the preceding three-year period.

The annual trend illustrates this contraction, peaking at 38,143 sq ft in 2021 before falling to 9,742 sq ft in 2023. However, the past two years have seen a stabilisation in volumes, averaging close to 17,000 sq ft per annum, with 2024 registering a marked rebound (24,500 sq ft across a single large deal, albeit to an alternative use occupier in the form of Padel Hub Group Ltd), up 152% on the previous year. Overall, while activity remains well below the levels seen earlier in the five-year period, the latest data points to a modest recovery in demand.

Although the previous take-up figures sound moderate, this is largely attributed to the limited supply within the Borough and specifically on the Longmead and Kiln Lane Industrial Estates. This is evidenced by the number of units actively being marketed at the present time. A search of LoopNet (Costar Group) highlighted 3 available units within the Borough, ranging in size from 1,997 to 9,713 sq ft. A similar search of EG Property Link highlighted 5 available units within the Borough, ranging in size from 1,498 to 1,669 sq ft. There is currently 32,573 sq ft of industrial accommodation available on a letting basis, equating to a vacancy rate of 5.75%.

Within the wider geographical area, there are arguably more desirable warehouse / industrial locations than Longmead and Kiln Lane Industrial Estates, especially for larger logistic operators/occupiers. These locations are usually centred around larger business clusters, often benefitting from better transport links (to both central London and the wider South East) and good access to the labour pool.

Examples include the area to the south of Gatwick Airport known as the Manor Royal Business District, which provides almost 10 million square feet of commercial floor space across an area of 240 hectares and is home to more than 600 businesses featuring large global companies and those involved in the aviation and supply chain sectors. Similarly, Croydon is viewed as a significant and strategic industrial and logistics hub for London and the Southeast, particularly for last-mile delivery services. The area benefits from excellent access to major arterial roads and the M25/M23 motorway.

3.0 FOCUSED ASSESSMENT OF PARCELS A, D, G, AND H

3.1. Parcel A

3.1.1. Parcel A has two large buildings on-site, one being the Ford Transit Centre, which comprises a motor trade dealership with a large forecourt/parking area, and the other being Blenheim House, a multi-tenanted light industrial property. The site is triangular in shape and split into two sections, accommodating the two buildings. Each portion of the site has two access points off Blenheim Road. From our research of the site and the current VOA floor areas, we understand the site to have the following;

- Site Area = 1.506 ha (15,060 sqm)
- Total Floor area = 5,573.5 sq m (GF = 3,941.22 sq m & FF = 1,632.28 sq m)
- Site Density = 37%
- Site Coverage = 26.2%

3.2. **Parcel D**

3.2.1. Parcel D contains five built structures on the site, comprising seven separate units. The majority of the site is occupied by Travis Perkins and Benchmarx (both part of the Travis Perkins Group) however, on-site uses also include a utilities company (SGN), a boxing club, and a martial arts club. The site is irregular in shape, with the buildings positioned to the south, facing Roy Richmond Way. There is a dropped Kerb along much of the Travis Perkins frontage with further vehicular access points. The site coverage and density are both very low, largely as a result of the building merchant yard and the north portion of the site comprising green space. From our research of the site and the current VOA floor areas, we understand the site to have the following;

- Site Area = 2.179 ha (21,790 sq m)
- Total Floor area = 4,340.33 sq m (GF = 3,791.43 sq m & FF = 548.9 sq m)
- Site Density = 19.9%
- Site Coverage = 17.4%

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3.3. **Parcel G**

3.3.1. Parcel G is rectangular in shape and comprises four terraces of single-storey trade counter / light industrial / warehouse units. There are 25 steel portal frame constructed units on-site, ranging from 1,100 to 4,400 sq ft. Each unit has a large forecourt and demised parking spaces. There are currently two points of access, with the estate road running through the centre of the estate and a one-way system in operation. Occupiers on the estate are largely trade-related, with tenants including Toolstation, Topps Tiles, and Electric Centre. The site is accessed off Kiln Lane and has a c.14m strip of landscaping between the rear of the building and Kiln Lane. The site coverage and density are both low as a result of the large proportion of underutilised land and large forecourts. From our research of the site and the current VOA floor areas, we understand the site to have the following;

Figures as built with no first-floor accommodation;

- Site Area = 1.131 ha (11,310 sq m) (EEBC measurement 11,307 sq m)
- Total Floor area = 3,794.91 sq m
- Site Density = 33.6%
- Site Coverage = 33.6%

Figures including tenant-installed first-floor accommodation;

- Site Area = 1.131 ha (11,310 sqm)
- Total Floor area = 4,245.18 sq m (GF = 3,794.91 sq m & FF = 450.27 sq m)
- Site Density = 37.5%
- Site Coverage = 33.6%

3.4. **Parcel H**

3.4.1. Parcel H comprises a broadly triangular site, occupied by Wilsons (motor trade business), with a significant proportion of the site being utilised for used vehicle sales, storage, and associated operations. The building on-site comprises a brick-clad industrial property under a pitched roof. To the front of the warehouse is a two-storey office/showroom block. There is one vehicular access point to the site from Kiln Lane. Site coverage is low, with the majority of the land given over to open car storage and circulation space. From our research of the site and the current VOA floor areas, we understand the site to have the following;

- Site Area = 1.212 ha (12,120 sq m)
- Total Floor area = 5,079.2 sq m (GF = 3,862.84 sq m & FF = 1,216.36 sq m)
- Site Density = 41.9%
- Site Coverage = 31.9%

4.0 ASSESSMENT OF COMPETING SCHEMES IN THE LOCAL MARKET

4.1. The subject sites on Kiln Lane and Longmead Industrial Estates, which form the basis of this report, are located in the Borough of Epsom and Ewell in Surrey. Epsom and Ewell is bordered by the Royal London Borough of Kingston upon Thames, London Borough of Sutton, Mole Valley and Reigate and Banstead. Beyond these authorities to the North East are the London Boroughs of Merton and Croydon.

4.2. We have reviewed below a range of recently constructed or consented schemes with a preference for developments located within surrounding Boroughs/Councils, choosing sites with similar characteristics (to the subject sites) where possible. This review highlights both the site coverage and site densities, which modern warehouse / industrial developers deem both acceptable and viable in the current market.

4.3. Base, Chessington, KT9 1SG (8,650 – 24,600 Sq Ft)

4.3.1. Location

Base Chessington is located within the Royal London Borough of Kingston Upon Thames to the south of the A3, which provides a direct route to central London to the north and south to the M25 Motorway. The western part of the site is triangular, whilst the eastern section is irregular in shape.

4.3.2. **Description**

New speculative development comprising of 7 light industrial / warehouse / last mile logistic units varying in size from 8,650 to 24,600 sq ft (GEA). Marketing particulars are attached at **Appendix 3.**

4.3.3. **Summary**

Outlined below is a summary of the main characteristics of Base, Chessington, which we have concluded from our research of the site;

- Developer – Arax Properties
- Site Area = Approximately 1.342 ha (13,422.33 sq m)
- Total Floor area = 9,675 sq m (GF = 7,273 sq m & FF = 2,402 sq m)
- Site Density = 72.1%
- Site Coverage = 54.2%
- Planning Status – Granted
- Unit Sizes – 8,650 to 24,600 sq ft
- First Floor (Office & Mezzanine) as a % of total floor area - 23% to 26%
- 8m clear internal height and 37.5kn/m² floor loading

4.4. __**Victory Park, Leatherhead, KT22 7NH (2,971 – 29,678 Sq Ft)**__

4.4.1. **Location**

Victory Park, Leatherhead, is located within the Mole Valley District to the south of Epsom & Ewell. The site is strategically located in Leatherhead, close to Junction 9 of the M25. The site is irregular in shape.

4.4.2. **Description**

New speculative development of 13 industrial and warehouse units ranging in size from 2,971 to 29,678 sq ft (GEA). Marketing particulars are attached at **Appendix 4.**

4.4.3. **Summary**

Outlined below is a summary of the main characteristics of Victory Park, Leatherhead, which we have concluded from our research of the site;

- Developer – Chancerygate
- Site Area = 1.86 ha (18,616 sq m)
- Total Floor area = 8,545.43 sq m (GF = 6,915.09 sq m & FF = 1,629.88 sq m)
- Site Density = 45.9%
- Site Coverage = 37.2%
- Planning Status – Granted (Available Q4 2026)
- Unit Sizes – 2,971 to 29,678 sq ft
- First Floor as a % of total floor area – 15% to 26%
- 7.4 – 8.5m clear internal height and 37.5kn/m² floor loading

4.5. **Saltwhistle Business Park, Redhill, RH1 (5,340 – 7,317 Sq Ft)**

4.5.1. **Location**

Saltwhistle Business Park, Redhill, is located within the boundaries of Reigate & Banstead Borough Council. The estate is located to the east of the A23 connecting north to London and south to Brighton. Junction 8 of the M25 is located to the northwest.

4.5.2. **Description**

Newly built development of 5 industrial and warehouse units ranging in size from 5,340 sq ft to 7,317 sq ft (GEA). Marketing particulars are attached at **Appendix 5.**

4.5.3. **Summary**

Outlined below is a summary of the main characteristics of Saltwhistle Business Park, which we have concluded from our research of the site;

- Developer – Vamos Invest

- Site Area = 0.3737 ha (3,737.56 sq m)
- Total Floor area = 2,955.79 sq m (GF = 2,393.54 sq m & FF = 562.25 sq m)
- Site Density = 79.1%
- Site Coverage = 64.0%
- Unit Sizes - 496.08 sq m to 679.74 sq m (GEA)
- First floor as a % of total floor area – 18.14% to 19.64
- 7.6m eaves height and 32.5kn/m² floor loading

4.6. **CR1 & CR2, Croydon, CR0 4BD (52,605 – 55,165 Sq Ft)**

4.6.1. **Location**

CR1 & CR2 are located within the boundaries of the London Borough of Croydon. The estate is located to the west of the A23 (Purley Way), connecting north to London and south to Brighton.

4.6.2. **Description**

Two newly built ultra-sustainable warehouse / industrial units ranging in size from 53,403 sq ft to 55,165 sq ft (GEA). Marketing particulars are attached at **Appendix 6.**

4.6.3. **Summary**

Outlined below is a summary of the main characteristics of CR1 & CR2, which we have concluded from our research of the site;

- Developer – GLI
- Site Area = 1.392 ha (13,920 sq m)
- Total Floor area = 10,011 sq m (GF = 8,132 sq m & FF = 1669 sq m)
- Site Density = 71.9%
- Site Coverage = 58.4%
- Unit Sizes - 4,887.123 sq m to 5,124.95 sq m (GEA)
- First floor as a % of total floor area – 15.3% to 18.1%
- 12m clear height and 50kn/m^2 floor loading

5.0 POTENTIAL DEVELOPMENT SCENARIOS & OPTIONS

5.1. As evidenced by the above competing schemes, there isn't a single site coverage or site density figure for 'best in class' warehouse / industrial developments. Site density in the four competing schemes ranged between 45.9 to 79.1% whilst site coverage ranged between 37.2% and 64.0%. It is clear from the competing schemes that both site density and coverage depend on the site-specific context, including (but not limited to) location, infrastructure, surrounding land uses, type of use, local planning authority policies, operational requirements, potential demand, etc.

5.2. Victory Park in Leatherhead, situated outside the M25, stands out as an outlier compared to the three other developments analysed. The layout of the scheme appears to have been designed with the estate road running through the centre of the estate, with relatively generous provision of green space. The surrounding land uses also appear to be different from both the subject parcels and three other competing schemes.

5.3. With Victory Park, Leatherhead deemed an outlier, we have taken the lowest site coverage (54.2%) and site density (71.9%) figures from the remaining three schemes and projected these figures to Parcels A, D, G, and H under 'Option A'.

5.4. We have undertaken a similar exercise for the highest site coverage (64%) and site density (79.1%) figures, forward projecting those under 'Option B' below.

5.5. **Parcel A (Site Area = 1.506 ha or 15,060 sq m)**

5.5.1. **Option A**

Site Coverage – 54.2% (8,163 sq m)
Site Density – 71.9% (10,828 sq m)

5.5.2. **Option B**

Site Coverage – 64% (9,638 sq m)
Site Density - 79.1% (11,912 sq m)

5.5.3. Considering the above, should Parcel A become available for comprehensive development, it could feasibly deliver between 10,828 and 11,912 sq m of warehouse

/ industrial accommodation over ground and first floors. Whilst unlikely, if a developer delivered a ground floor only units, the site could feasibly deliver between 8,163 and 9,638 sq m.

5.5.4. When compared against the current buildings on Parcel A (5,574 sq m), this creates an increase of 5,254 sq m at the lower end and 6,338 sq m at the upper end.

5.6. **Parcel D (Site Area = 2.179 ha or 21,790 sq m)**

5.6.1. **Option A**

Site Coverage – 54.2% (11,810 sq m)
Site Density – 71.9% (15,667 sq m)

5.6.2. **Option B**

Site Coverage – 64% (13,946 sq m)
Site Density - 79.1% (17,236 sq m)

5.6.3. Considering the above, should Parcel D become available for comprehensive development, it could feasibly deliver between 15,667 and 17,236 sq m of warehouse / industrial accommodation over ground and first floors. Whilst unlikely, if a developer delivered a ground floor only units, the site could feasibly deliver between 11,810 and 13,946 sq m.

5.6.4. When compared against the current buildings on Parcel D (4,340 sq m), this creates an increase of 11,327 sq m at the lower end and 12,896 sq m at the upper end.

5.7. **Parcel G (Site Area = 1.131 ha or 11,310 sq m)**

5.7.1. **Option A**

Site Coverage – 54.2% (6,130 sq m)
Site Density – 71.9% (8,132 sq m)

5.7.2. **Option B**

Site Coverage – 64% (7,238 sq m)

Site Density - 79.1% (8,946 sq m)

5.7.3. Considering the above, should Parcel G become available for comprehensive development, it could feasibly deliver between 8,132 and 8,946 sq m of warehouse / industrial accommodation over ground and first floors. Whilst unlikely, if a developer delivered ground floor only units, the site could deliver between 6,130 and 7,238 sq m.

5.7.4. When compared against the current buildings on Parcel G (3,795 sq m), this creates an increase of 4,337 sq m at the lower end and 5,151 sq m at the upper end.

5.8. **Parcel H (Site Area = 1.212 ha or 12,120 sq m)**

5.8.1. **Option A**

Site Coverage – 54.2% (6,569 sq m)
Site Density – 71.9% (8,714 sq m)

5.8.2. **Option B**

Site Coverage – 64% (7,757 sq m)
Site Density - 79.1% (9,587 sq m)

5.8.3. Considering the above, should Parcel H become available for comprehensive development, it could feasibly deliver between 8,714 and 9,587 sq m of warehouse / industrial accommodation over ground and first floors. Whilst unlikely, if a developer delivered ground-floor only units, the site could deliver between 6,569 and 7,757 sq m.

5.8.4. When compared against the current buildings on Parcel H (5,079 sq m), this creates an increase of 3,635 sq m at the lower end and 4,508 sq m at the upper end.

6.0 CONCLUSIONS

6.1. It is evident after analysing the subject parcels (A, D, G, and H) and competing schemes that should parcels A, D, G, or H become available for comprehensive redevelopment, then they could support intensification. As evidenced, it is not unusual for warehouse / industrial developers within the M25 or larger urban centre to construct new developments with a site coverage exceeding 60% with site densities in the range of 70 to 80%.

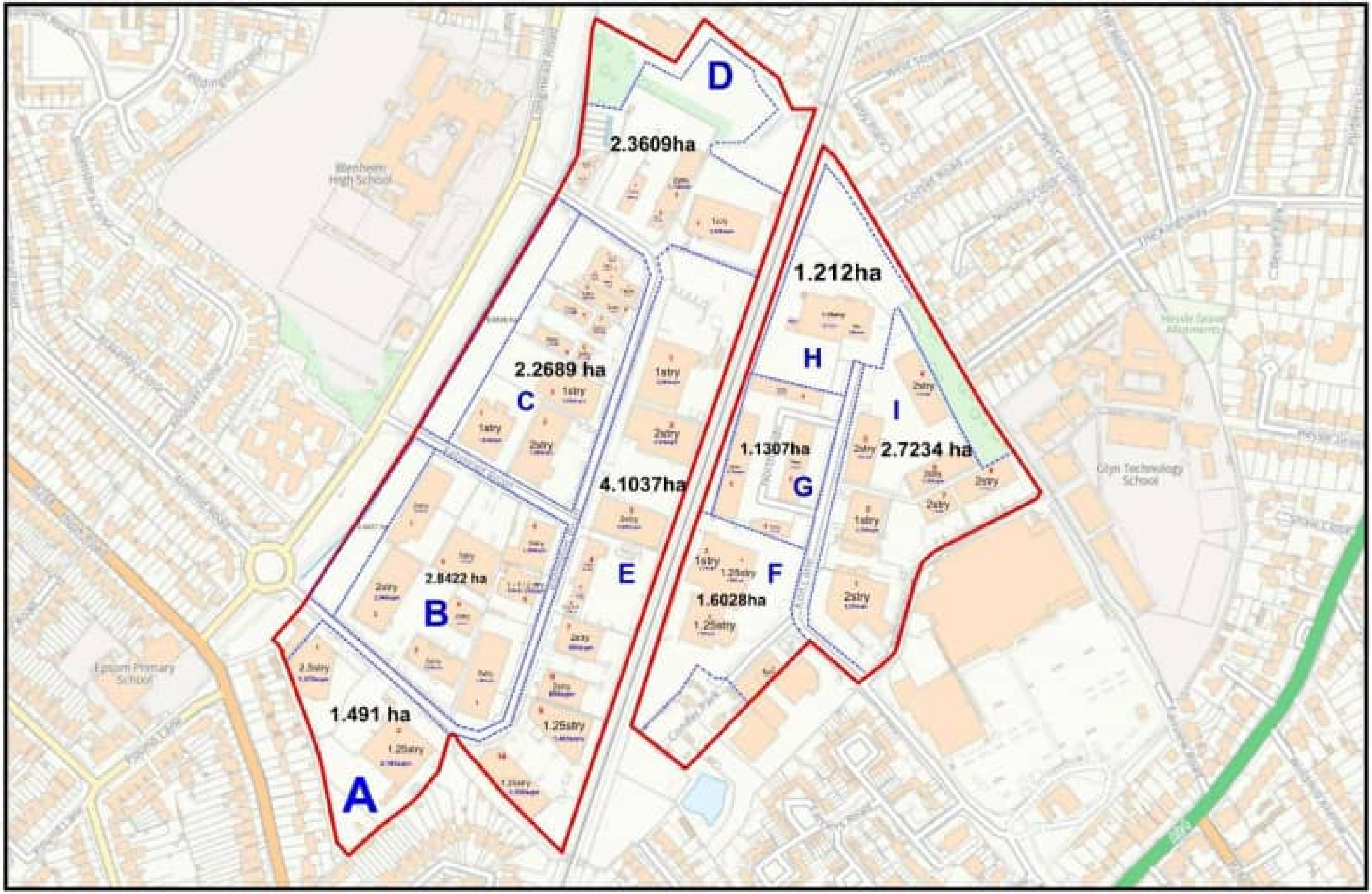
6.2. Taking the lower figures highlighted above and assuming a site density of c.72% parcels A, D, G, and H could potentially support an increase of 24,553 sq m (Parcel A - 5,254 sq m, Parcel D - 11,327 sq m, Parcel G - 4,337 sq m and Parcel H - 3,635 sq m) should they become available for comprehensive redevelopment.

Grant Mills Wood Chartered Surveyors & Development Consultants

September 2025

APPENDIX 1

Site Plan



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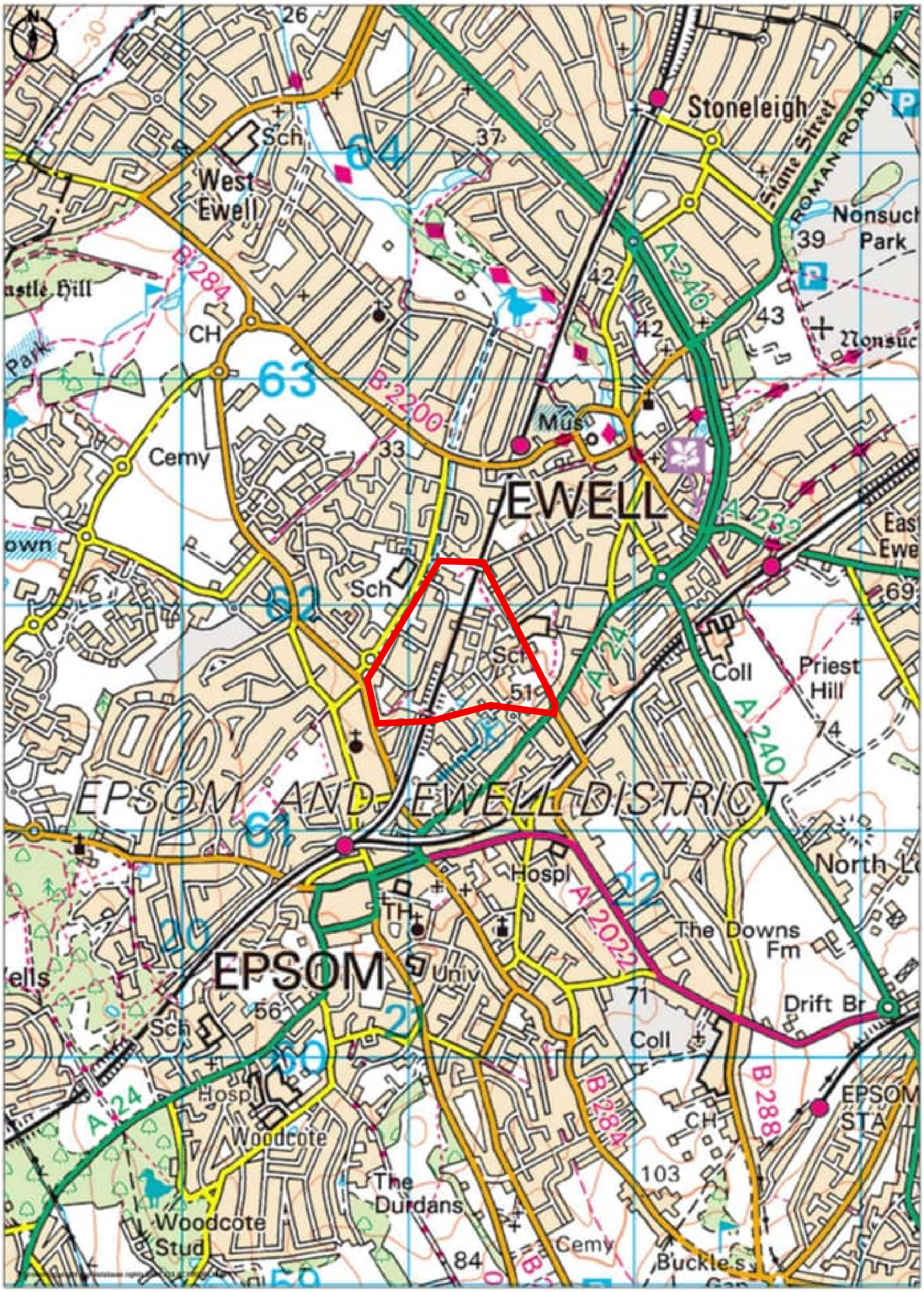
APPENDIX 2

Location Plan



Promap
LANDMARK INFORMATION

Plotted Scale - 1:30000. Paper Size – A4

APPENDIX 3

Base, Chessington, KT9 1SG, Brochure

New Warehouse / Industrial Development

Seven Industrial Units
Planning Granted

8,650 Sq Ft - 24,600 Sq Ft
basechessington.com

Computer Generated Image

BASE

CHESSINGTON

Surrey
KT9 1SG

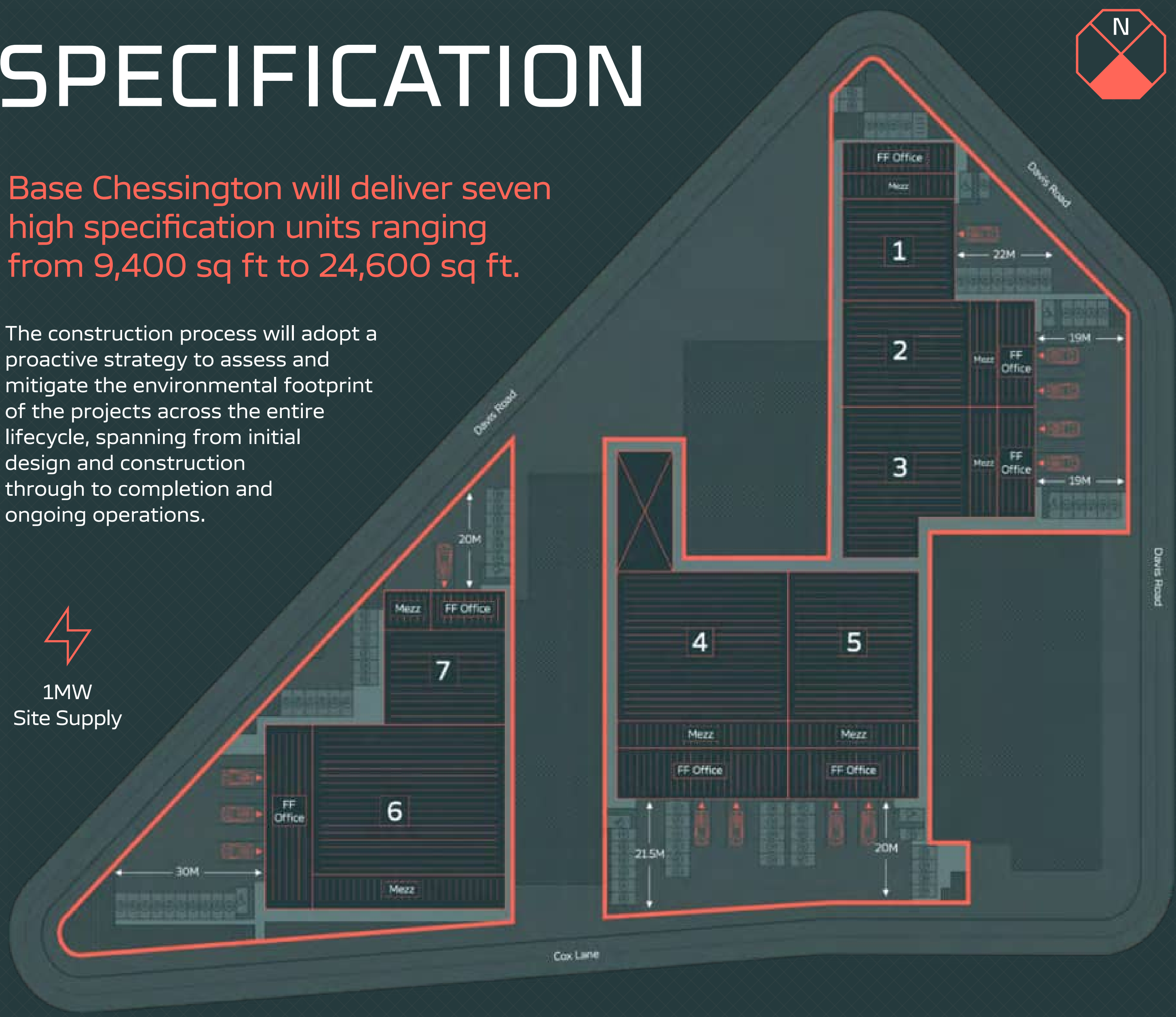
BRING ON THE BASE

Base Chessington is a brand new speculative development comprising seven light industrial / warehouse / last mile logistics units.

Within 3 minutes of the A3 arterial road in one of South West London's premier last mile locations.

In a popular and established commercial district with occupiers including **Alliance**, **UniChem**, **New England Seafood**, **British Telecom**, **Specialized Bikes**, **Oliver Bonas** and **Selco**. Nearby trade occupiers include **Howdens**, **Screwfix**, **Buildbase** and **Brandon Hire**.

SPECIFICATION



Base Chessington will deliver seven high specification units ranging from 9,400 sq ft to 24,600 sq ft.

The construction process will adopt a proactive strategy to assess and mitigate the environmental footprint of the projects across the entire lifecycle, spanning from initial design and construction through to completion and ongoing operations.

1MW
Site Supply

Photovoltaic Panels

Target BREEAM 'Excellent'

Minimum EPC 'A' Rating

EV Charging Spaces

Minimum 10 Cycle Spaces Per Unit

Net Zero Carbon Ready

8M Clear Height

37.5KN/M² Floor Loading

19m - 28.5m Yard Depths

Unit 1	Sq Ft*	Sq M*
Ground Floor	7,000	650
First Floor Mezzanine	1,000	93
First Floor Office	1,400	130
Total Area	9,400	873
Yard Depth		22M
Level Access Doors		1
Power		90 KVA
Parking Spaces		10

Unit 2	Sq Ft*	Sq M*
Ground Floor	8,500	790
First Floor Mezzanine	1,150	107
First Floor Office	1,700	158
Total Area	11,350	1,055
Yard Depth		19M
Level Access Doors		2
Power		110 KVA
Parking Spaces		8

Unit 3	Sq Ft*	Sq M*
Ground Floor	9,700	901
First Floor Mezzanine	1,150	107
First Floor Office	1,700	158
Total Area	12,550	1,166
Yard Depth		19M
Level Access Doors		2
Power		110 KVA
Parking Spaces		9

Unit 4	Sq Ft*	Sq M*
Ground Floor	15,900	1,477
First Floor Mezzanine	2,100	195
First Floor Office	3,150	293
Total Area	21,150	1,965
Yard Depth		21.5M
Level Access Doors		2
Power		200 KVA
Parking Spaces		17

Unit 5	Sq Ft*	Sq M*
Ground Floor	12,000	1,115
First Floor Mezzanine	1,600	149
First Floor Office	2,400	223
Total Area	16,000	1,487
Yard Depth		20M
Level Access Doors		2
Power		140 KVA
Parking Spaces		12

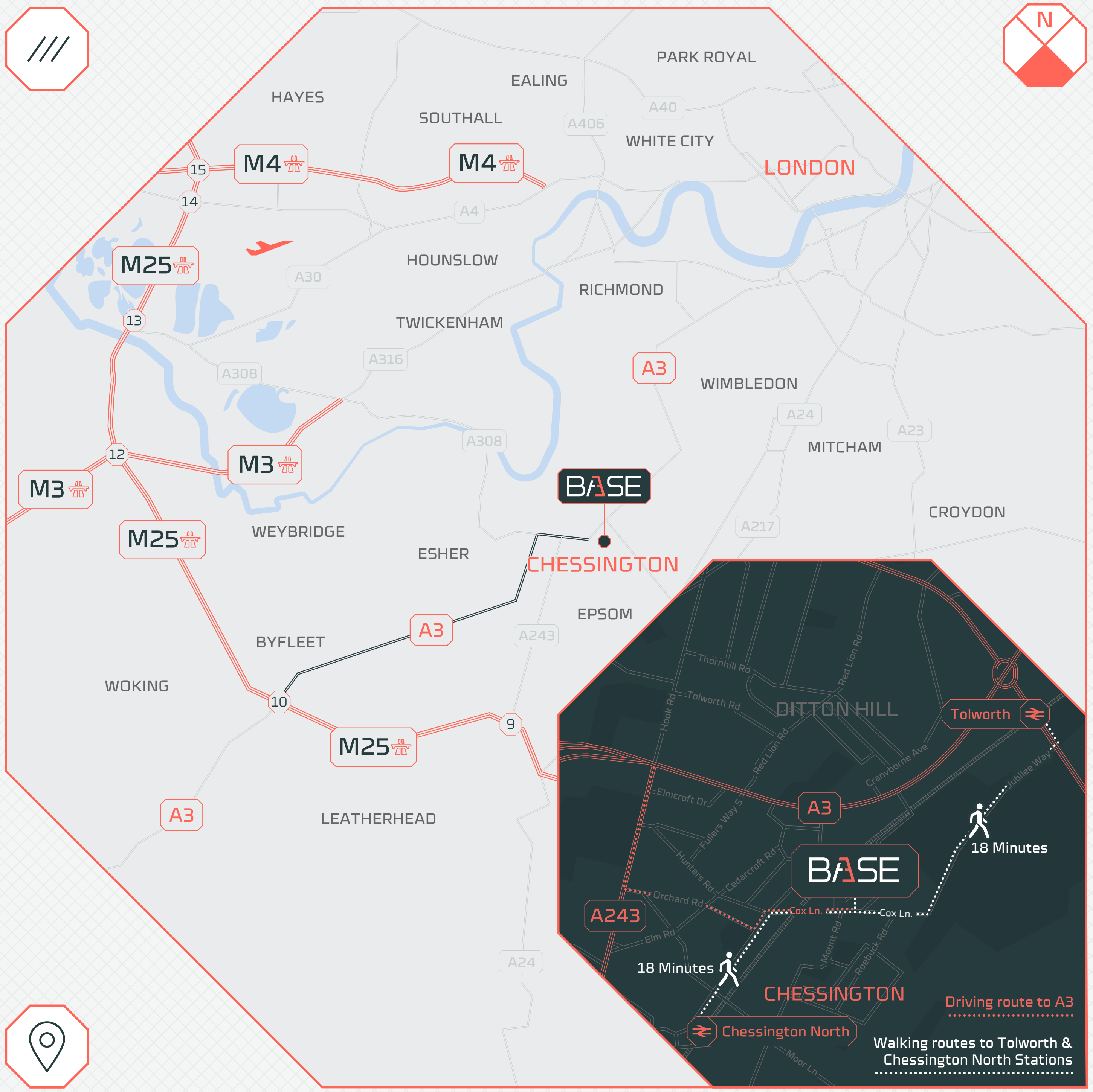
Unit 6	Sq Ft*	Sq M*
Ground Floor	18,350	1,705
First Floor Mezzanine	2,500	232
First Floor Office	3,750	348
Total Area	24,600	2,285
Yard Depth		25M
Level Access Doors		3
Power		140 KVA
Parking Spaces		23

Unit 7	Sq Ft*	Sq M*
Ground Floor	6,400	595
First Floor Mezzanine	900	84
First Floor Office	1,350	125
Total Area	8,650	804
Yard Depth		28.5M
Level Access Doors		1
Power		120 KVA
Parking Spaces		7

**Approximate gross internal floor areas*

LOCATION

Base Chessington is located on Cox Lane, near the junction with Davis Road and benefits from excellent transport communications being adjacent to the A3 arterial road, (0.8 miles / 3 minutes) which offers direct access into both Central London 14.7 miles to the north and Junction 9 of the M25 4.6 miles to the south.



DEMOGRAPHICS

930,000+
Population within a 20 Minutes drive.

82.9%
Economically active population, 3.7% higher than the London average.

330,000+
Workforce within a 20 Minutes drive.

16.9%
Of local population employed in skilled trades, 5.5% higher than the London average.

TRAVEL TIMES

A3	M25 (J9)	M25 (J10)	M25 (J12) / M3 (J2)
1 Mile	4.6 Miles	10.2 Miles	17.1 Miles
3 Minutes (OP)	12 Minutes (OP)	14 Minutes (OP)	17 Minutes (OP)
6 Minutes (P)	22 Minutes (P)	22 Minutes (P)	35 Minutes (P)

Off-Peak (OP) | Peak (P)

Wimbledon	Kingston	Wandsworth	Waterloo
15 Minutes from Tolworth Station	18 Minutes from Tolworth Station	22 Minutes from Tolworth Station	31 Minutes from Tolworth Station

Chessington	Kingston	Wimbledon	Central London
0.6 Miles	4.2 Miles	6.7 Miles	14.7 Miles
2 Minutes (OP)	12 Minutes (OP)	16 Minutes (OP)	50 Minutes (OP)
3 Minutes (P)	16 Minutes (P)	35 Minutes (P)	110 Minutes (P)

71 Bus	K2 Bus	418 Bus	406 Bus
3 Minutes walk (Moor Lane)	3 Minutes walk (Roebuck Road)	18 Minutes walk (Tolworth station)	18 Minutes walk (Tolworth station)

Sources: Google Maps, City Mapper, ONS Survey & Nomis


Computer Generated Image

BASE

Available - To Let - Q1 2025

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Max Dowley
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SHW

Alex Gale
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Mark Skelton
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07885 743 202

A Development By:
ARAX PROPERTIES

basechessington.com

APPENDIX 4

Victory Park, Leatherhead, KT22 7NH, Brochure

VICTORY PARK
Leatherhead, KT22 7NH

To let
13 new warehouse/industrial units
2,971 - 29,678 sq ft

Available Q4 2026

what3words
grapes.wounds.bumpy

Chancerygate
Investment Property Limited

Strategic locations.
Sustainable buildings.

Strategically located in Leatherhead near Junction 9 of the M25, Victory Park offers excellent links to London, Heathrow, and Gatwick and, sits outside the ULEZ, saving international lorry drivers £40–£100 per day.

Accommodation

All areas are approximate on a GEA (Gross External Area) sq ft basis.

Unit	Ground floor	First floor	Total	Clear internal eaves height
1	9,279	1,916	**11,195**	8.5m
2	10,926	1,916	**12,842**	8.5m
3	4,553	1,087	**5,641**	6.5m
4	3,380	1,066	**4,446**	7.4m
5	2,476	990	**3,466**	7.65m
6	2,185	786	**2,971**	7.9m
7	12,314	2,530	**14,844**	8.5m
8	6,114	1,216	**7,331**	8.5m
9	6,243	1,259	**7,503**	8.5m
10	4,456	1,259	**5,716**	8.5m
11	4,026	1,130	**5,156**	8.5m
12	4,026	1,130	**5,156**	8.5m
13	4,456	1,259	**5,716**	8.5m
		Total	**91,982**	

Largest combined area: 29,678 sq ft (units 7, 8 and 9)

Industrial & warehouse
2,971 - 29,678 sq ft

Victory Park is a scheme of 13 high quality, flexible units with fully fitted first floor offices. The ground floor space features a fitted reception and warehouse space with electric loading doors and generous natural light. On the first floor, the fitted offices include comfort heating/cooling.

Available Q4 2026

- 37.5 sq m floor loading
- 6.5-8.5m minimum clear internal height
- Electric loading doors
- 12-18m yard depths
- Fully fitted first floor offices
- Lift units 1, 2 & 7
- Air source heat pumps
- Solar PV panels on all units
- Raised office floors units 1, 2, 7, 8 & 9
- Amenity areas
- EV charging (50% of spaces)
- Comfort cooling/heating

CGI of units 3-6


Previous Chancerygate development

CGI of units 2-1


Previous Chancerygate development

Sustainable approach.
Positive impact.

Previous Chancerygate development

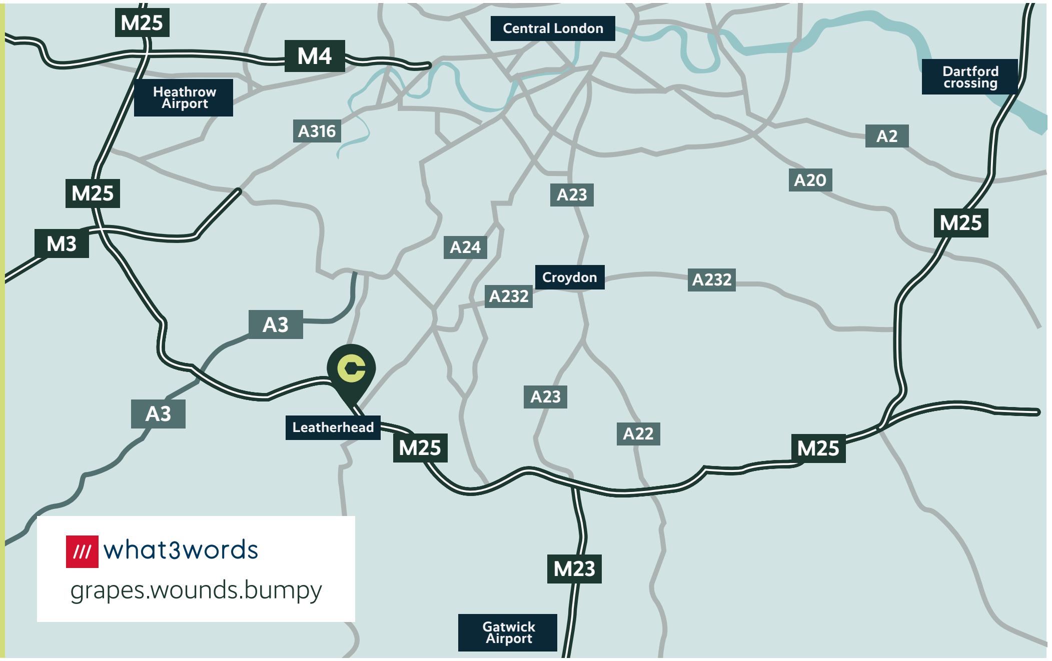
We take a forward-thinking approach to minimise our impact on the environment, from design and construction through to operation. Working with leading sustainability consultants, Chancerygate embraces the latest technologies and methods to achieve future-proof solutions.

Green initiatives at Victory include:

- Solar PV panels on all units
- High performance insulated cladding and roof materials
- Highly efficient LED lighting
- Low air permeability design
- Electric vehicle parking (50% of spaces)
- Air source heat pumps
- 15% warehouse roof lights increasing natural day light
- Landscaped amenity areas enhancing biodiversity
- Exterior cycle storage to encourage cycling to work

Right spaces.
Right places.

Cleeve Road, Leatherhead, Surrey KT22 7NH



Road	**Distance (miles)**
M25 (J9)	1
A3 (Hook Junction)	1
M23 (J11)	10
M3 (J2)	14
M4 (J4B)	19

Town/City	
Croydon	14.8
Crawley	23
Guildford	25
Central London	43

Airport	**Distance (miles)**
Gatwick	21
Heathrow	23

Rail	
Leatherhead Train Station	0.8

victory-park.co.uk

Contact agents to find out more

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aalibhai@lsh.co.uk

Chancerygate Investment Property Limited

APPENDIX 5

Saltwhistle Business Park, Redhill, RH1, Brochure

LAST 3
UNITS AVAILABLE

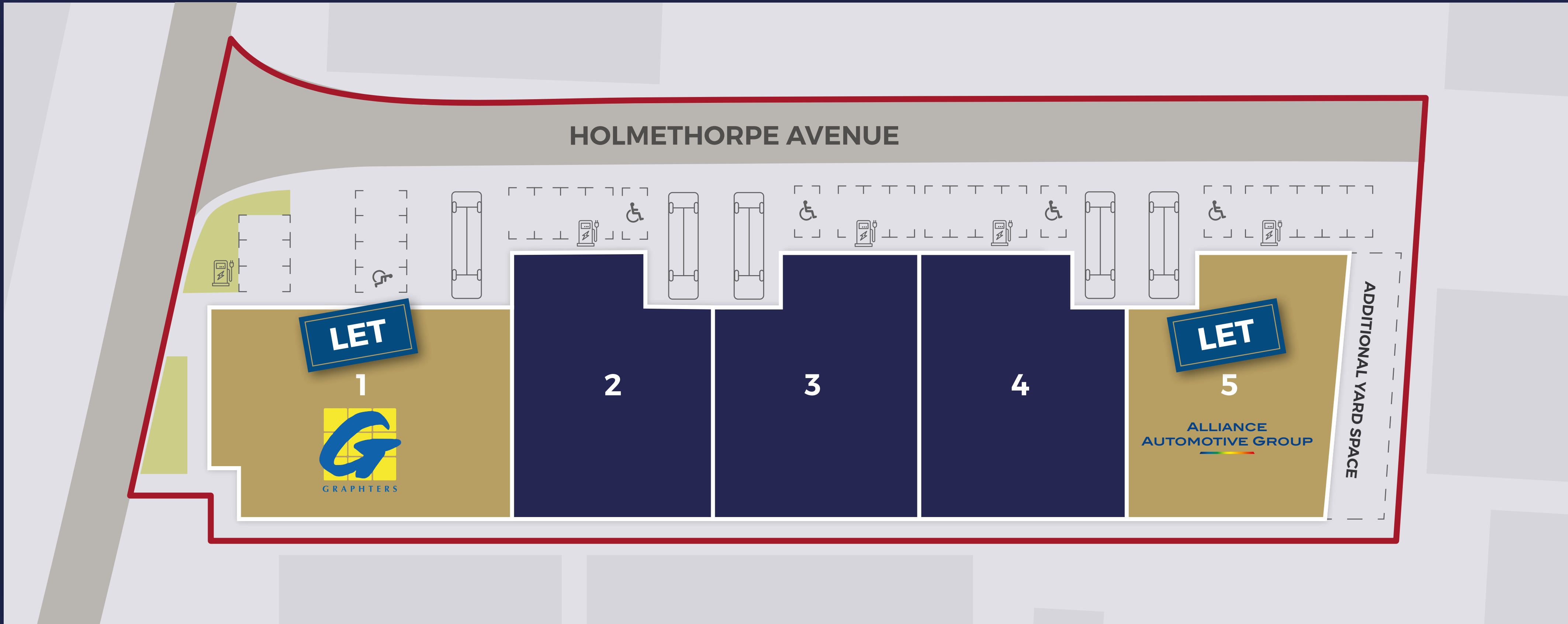
RENTS
FROM **£15** PER SQ FT

saltwhistle
BUSINESS PARK

42 - 44 HOLMETHORPE AVENUE
REDHILL | RH1 2NL

BRAND NEW INDUSTRIAL/WAREHOUSE UNITS TO LET

5,340 - 17,585 SQ FT



LET

UNIT 1	ft²	m²	Parking
Ground Floor	5,989	[illegible]	
First Floor	[illegible]	[illegible]	
TOTAL	7,317	679.74	7 Spaces

UNIT 2	ft²	m²	Parking
Ground Floor	5,093	473.19	
First Floor	1,245	115.68	
TOTAL	6,338	588.87	5 Spaces

UNIT 3	ft²	m²	Parking
Ground Floor	4,334	402.61	
First Floor	1,006	93.47	
TOTAL	5,340	496.08	4 Spaces

UNIT 4	ft²	m²	Parking
Ground Floor	4,782	444.27	
First Floor	1,122	104.26	
TOTAL	5,904	548.53	5 Spaces

LET

UNIT 5	ft²	m²	Parking
Ground Floor	5,566	[illegible]	
First Floor	[illegible]	[illegible]	
TOTAL	6,917	642.57	7 Spaces

TOTAL	17,582	1,633.48

Approximate Gross External Areas.


3


saltwhistle
BUSINESS PARK
TO LET
TO LET
TO LET
TO LET
TO LET
42 HOLMETHORPE AVENUE
ALL ENQUIRIES
shw.co.uk
020 8662 2700
SHW

DESCRIPTION

A new development of 5 high quality industrial / warehouse units in the heart of the main Redhill, Holmethorpe Industrial Estate. Units have been constructed with the latest environmental requirements in mind and aim to be best in class.

Nearby occupiers include:

SCREWFIX TOOLSTATION halfords HOWDENS

LOCATION

A23
0.9 Miles | 4 Mins

Redhill Station
1.0 Miles | 4 Mins

M23/M25 J7
3.0 Miles | 8 Mins

Gatwick Airport
7.7 Miles | 21 Mins

SPECIFICATION

7.6m
Eaves Height

1 Double Electric
Vehicle Charger
Per Unit

BREEAM
Rating 'Very
Good' Targeted

Electric Roller
Shutter Doors

EPC Rating
A

VRF Heat Pumps
to Offices

32.5 kN/m^2
Floor Loading

13%
Roof Lights

The high quality units also benefit from:

- Fully fitted offices
- Tea points
- Shower and disabled facilities
- Fibre ready buildings
- Perimeter trunking to offices

Hurst Warne

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SHW

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Laura Miles
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07947 373 275

APPENDIX 6

CR1 & CR2, Croydon, CR0 4BD, Brochure

A SIZEABLE CHANGE

- 50% More Volume
- 37,000 sq ft Mezzanine Expansion
- 100% Van Fleet Charging Points
- 850KVA Power
- PV Cost Savings of £60,000 pa
- 37m Yard Depth

A future-proofed logistics warehouse designed to save energy and operational costs. CR1 will optimise your supply chain and delivers 50% more volume than the standard 8m Croydon unit. It includes the option of a 37,000 sq ft mezzanine expansion that increases floor space to 90,043 sq ft. Maximum rooftop solar PV delivers a £60,000 energy cost savings p.a.*

53,043 SQ FT
OPPORTUNITY TO EXPAND INTO CR2

Combined CR1+CR2 total of 108,208 SQ FT

*Details available on request

CROYDON IS CONNECTED

Croydon is a dynamic and well-established industrial and logistics hub. CR1 is ideally located off the Purley Way, easily accessible for a large skilled workforce, well connected by road and rail to London's transport network.

South London's best-connected industrial hub – 15 minutes to Central London or Gatwick.

Croydon has direct connections to London Bridge, London Victoria, and international intersections like St Pancras International.

Highly skilled workforce and 1m economically active individuals within 30 minutes commute.

15 MINUTES TO CENTRAL LONDON

by rail

PURLEY WAY

5 minutes drive

M25

15 minutes drive

1M HOUSEHOLDS

within 40 min drive

1M PEOPLE

within a 30 minute drive

Data from Develop Croydon

12M
CLEAR HEIGHT

THREE DOCK LEVEL
LOADING DOORS

FOUR LEVEL ACCESS
LOADING DOORS

32 CAR PARKING (100% EV)
9 VAN PARKING (100% EV)

850KVA
TOTAL POWER

50 KN/M²
FLOOR LOADING

N

NOT TO SCALE
Indicative only

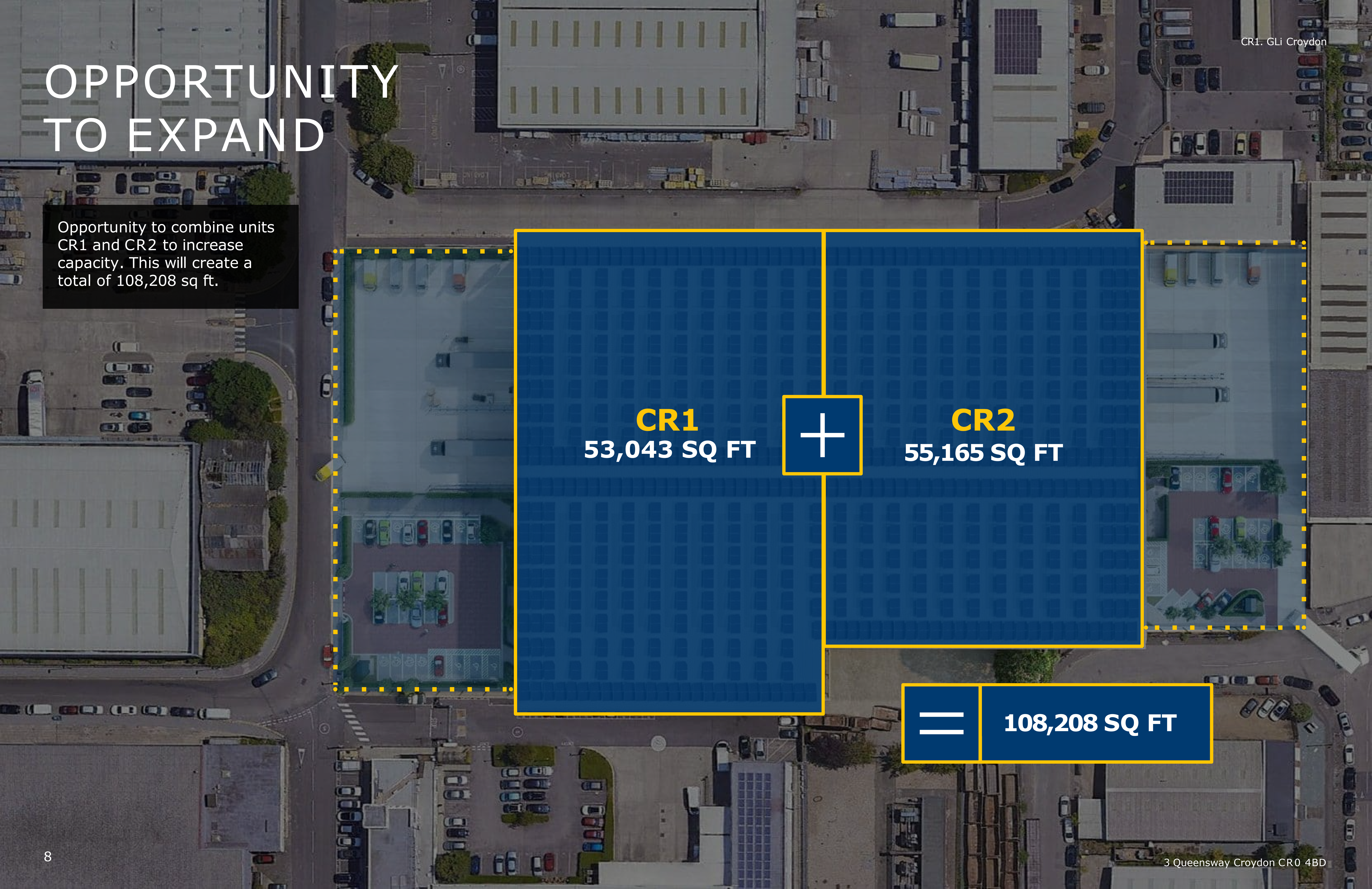
	SQ FT	SQ M
WAREHOUSE	43,130	4,007
OFFICE FIRST FLOOR	6,892	640
CORE	3,021	281
TOTAL AREA	**53,043**	**4,928**

All areas are approximate and calculated on a gross external basis (GEA).

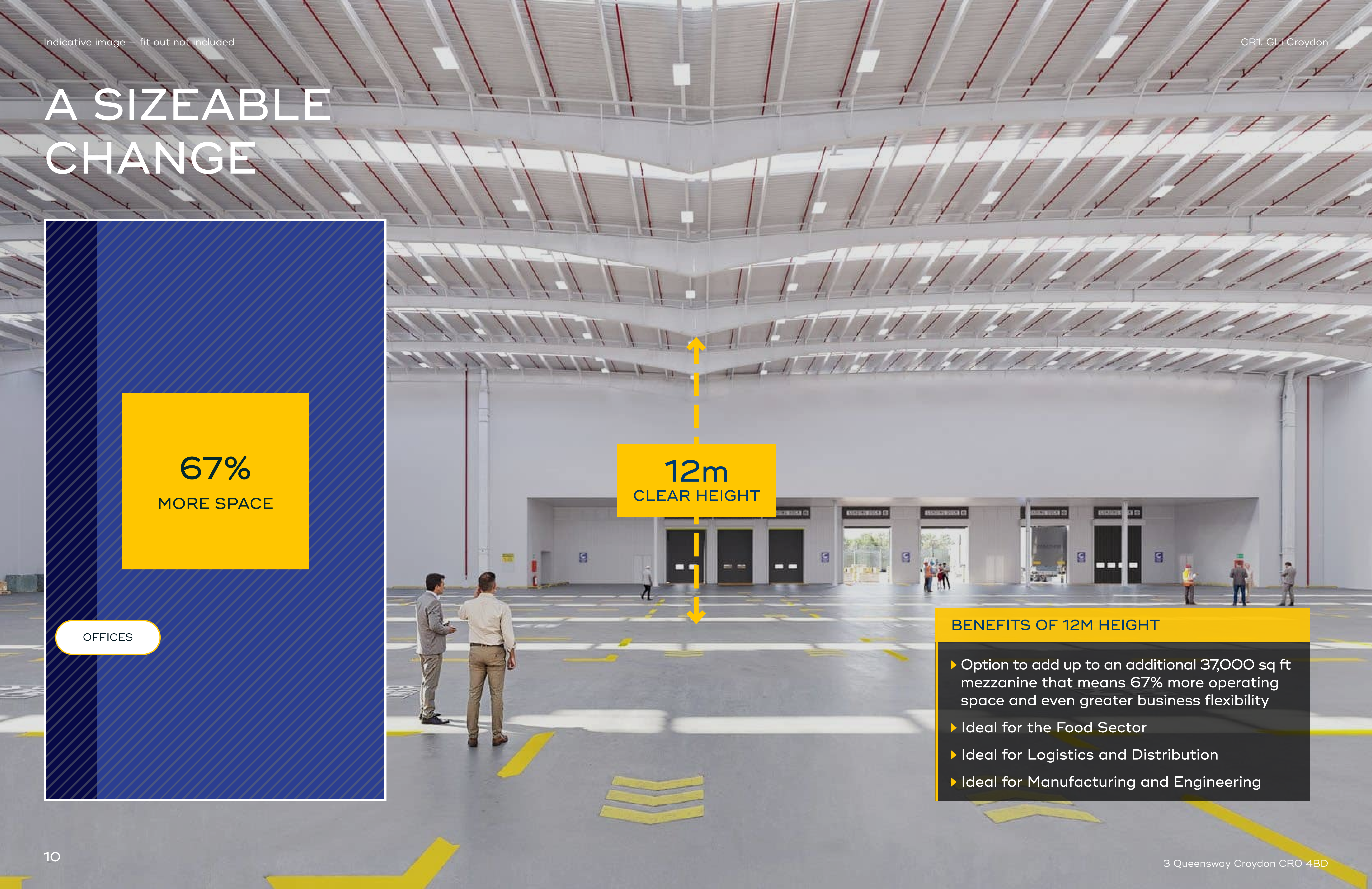
OPPORTUNITY TO COMBINE WITH CR2 FOR TOTAL 108,208 SQ FT
Available Q4 2025

OPPORTUNITY TO EXPAND

Opportunity to combine units CR1 and CR2 to increase capacity. This will create a total of 108,208 sq ft.



A SIZEABLE CHANGE



BENEFITS OF 12M HEIGHT

- Option to add up to an additional 37,000 sq ft mezzanine that means 67% more operating space and even greater business flexibility
- Ideal for the Food Sector
- Ideal for Logistics and Distribution
- Ideal for Manufacturing and Engineering

REVOLUTION IN FLEXIBILITY

BENEFITS OF 12M HEIGHT

- 50% more pallets than an 8M warehouse
- Providing even more flexibility

5,664	Pallet Locations (VNA)
4,080	Pallet Locations (WA)

4M HIGHER THAN A STANDARD 8M CROYDON WAREHOUSE

12M clear height offers 50% more volume than 8M warehouses. That means one more additional tier of pallets.

DELIVERING A SUSTAINABLE REVOLUTION

CR1's future-proofed, innovative design lowers occupier energy and operational costs. EPC A+ and BREEAM Excellent targets prepare the property for the regulatory impacts of London Zero 30.

- Supporting Corporate Sustainability Goals
- Exceeding London Zero 30 Regulatory Requirements
- Saving Operational Costs with Efficient 100% EV Van Fleet Charging

MAXIMUM CAPACITY SOLAR PV

12 BICYCLES STORAGE

RAINWATER HARVESTING

GREEN LIVING WALL

LED LIGHTING
75% LESS ENERGY
25% MORE DURABILITY

SUB-METERING OF ENERGY CONSUMPTION

100% ELECTRIC

NET ZERO CARBON STATUS

BREEAM EXCELLENT
TARGETED

CARBON NEUTRAL BUILD

TARGET EPC A+

BATTERY READY

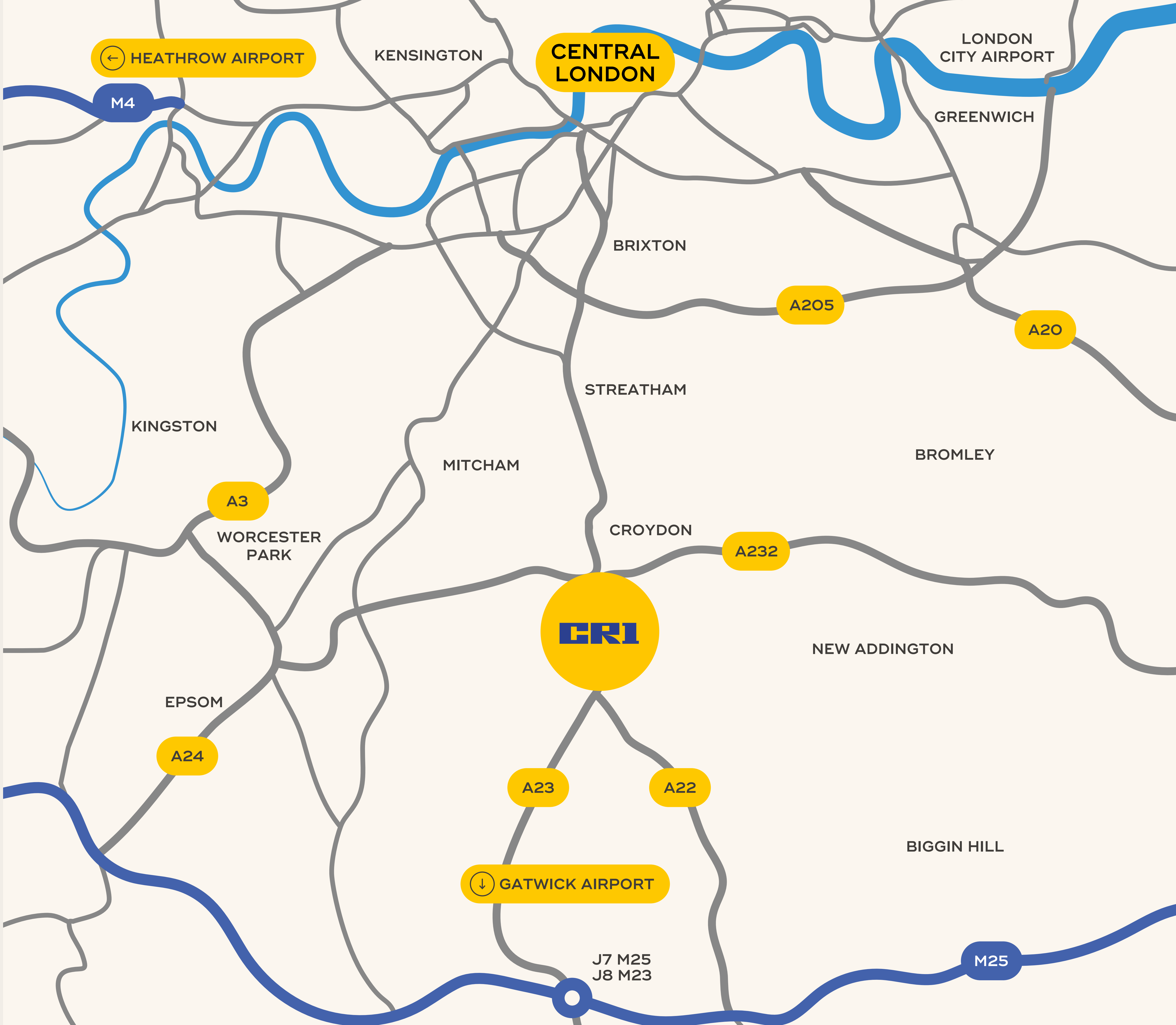
CROYDON BY ROAD

DRIVE TIMES (MINS)

M23	24
M25	18
CENTRAL LONDON	50
GATWICK	27
HEATHROW	53

GOOGLE MAPS

///CONE.RACKS.VOTERS



JOIN THE CROYDON REVOLUTION

INTERNATIONALLY CONNECTED BY AIR

NATIONALLY CONNECTED BY RAIL

NATIONALLY CONNECTED BY ROAD

The Croydon industrial area is the industrial and logistics hub for businesses of the future.

It is situated in a prime location for those serving customers in London and the southeast.

Average annual income per annum £49,000

750,000 skilled workforce on your doorstep

Global occupiers already in Croydon include, Amazon, DHL, Evri, Digital Realty, Oddbox, Peleton and Tropic Skincare

CROYDON TRANSPORT

TRAIN

1.5 MILES

EAST CROYDON — +9 — CLAPHAM JUNCTION — +8 — LONDON VICTORIA

SOUTHERN

0.6 MILES

WADDON — +4 — WEST CROYDON — +7 — NORWOOD JUNCTION — +4 — CRYSTAL PALACE — +11 — CLAPHAM JUNCTION — +8 — LONDON VICTORIA

0.6 MILES

WADDON — +4 — WEST CROYDON — +7 — NORWOOD JUNCTION — +12 — LONDON BRIGE

WINDRUSH LINE

1.6 MILES

WEST CROYDON — +23 — NEW CROSS GATE — +6 — CANADA WATER — +7 — WHITECHAPEL — +12 — HIGHBURY & ISLINGTON

TRAMLINK

WIMBLEDON — +30 — MITCHAM JUNCTION — +16 — WEST CROYDON — +10 — EAST CROYDON — +40 — BECKENHAM JUNCTION

BUSES

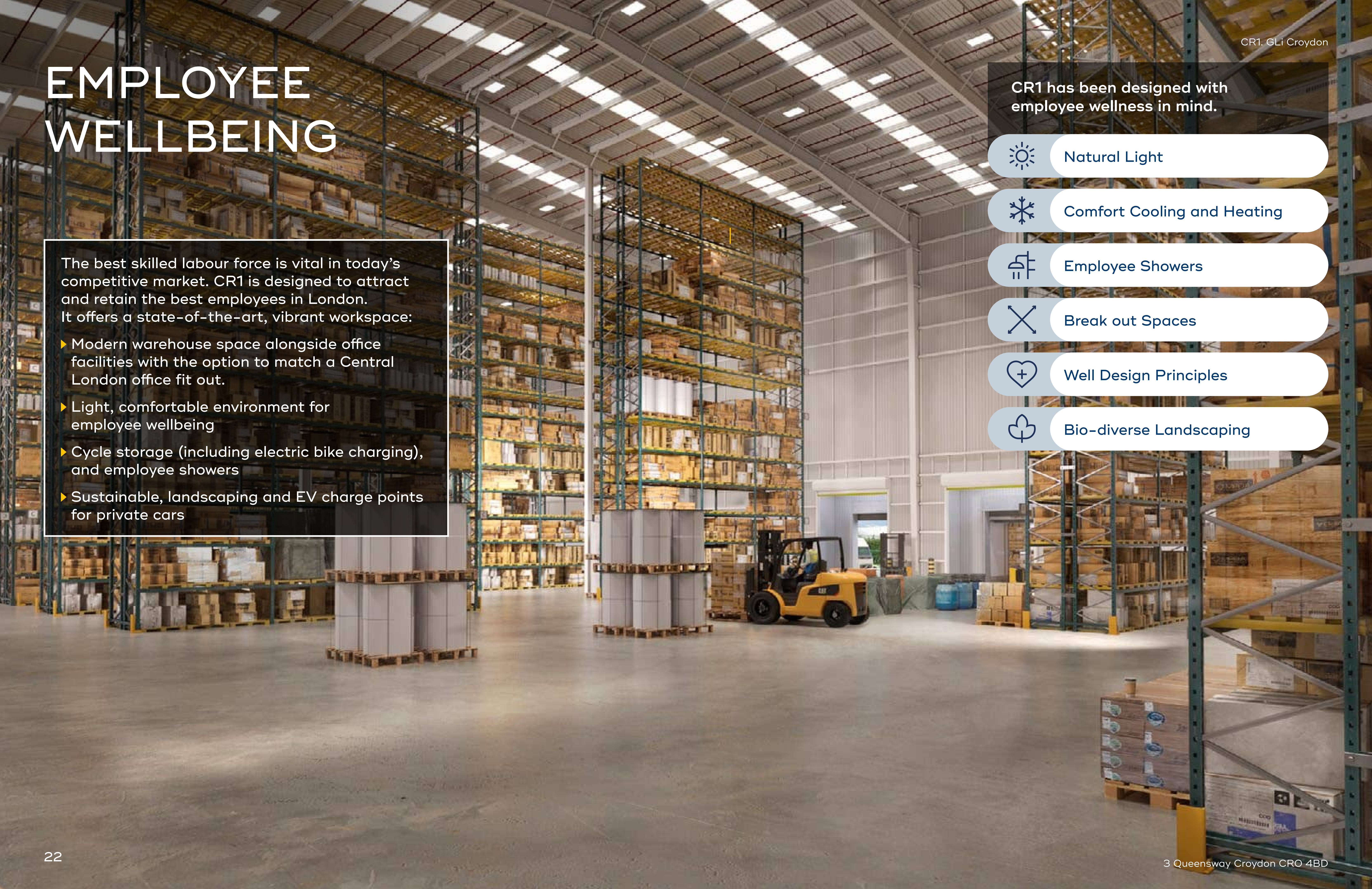
0.3 MILES — 154 STOP EL

+4 — WADDON LEISURE CENTRE/ FIVEWAYS — +2 — WADDON STATION — +12 — PARK LANE/ FAIRFIELD HALLS — +1 — WHITGIFT CENTRE — +3 — WEST CROYDON BUS STATION

0.4 MILES — 119 STOP NG

+19 — EAST CROYDON STATION — +2 — SANDILANDS TRAM STOP — +38 — BROMLEY SOUTH STATION — +7 — BROMLEY NORTH STATION

EMPLOYEE WELLBEING



The best skilled labour force is vital in today's competitive market. CR1 is designed to attract and retain the best employees in London.
It offers a state-of-the-art, vibrant workspace:

- Modern warehouse space alongside office facilities with the option to match a Central London office fit out.
- Light, comfortable environment for employee wellbeing
- Cycle storage (including electric bike charging), and employee showers
- Sustainable, landscaping and EV charge points for private cars

CR1 has been designed with employee wellness in mind.

- Natural Light
- Comfort Cooling and Heating
- Employee Showers
- Break out Spaces
- Well Design Principles
- Bio-diverse Landscaping

GLi CROYDON

CR1

LAST WORD IN LAST MILE

CR1 is part of the extensive and award-winning GLi London platform, a portfolio of next generation warehouses with multiple sites across London within the M25.

Our properties are designed to save occupier energy costs and maximise operating efficiency. Our vision is to regenerate the vital industrial areas serving the London population, creating the best buildings in the best possible locations.

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KSP

PATRIZIA

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will@ksp.london

JOIN THE INDUSTRIAL REVOLUTION CROYDON

A Prime Logistics warehouse in
South London's Most Strategic Location

CR2
GLi CROYDON

12 Imperial Way, Croydon CRO 4RR
what3words ///motel.movies.vision

55,165 SQ FT
Available Q4 2024

A SIZEABLE CHANGE

- 50% More Volume
- 100% Van Fleet Charging Points
- PV Cost Savings of £60,000 pa
- 37,000 sq ft Mezzanine Expansion
- 850KVA Power
- 37m Yard Depth

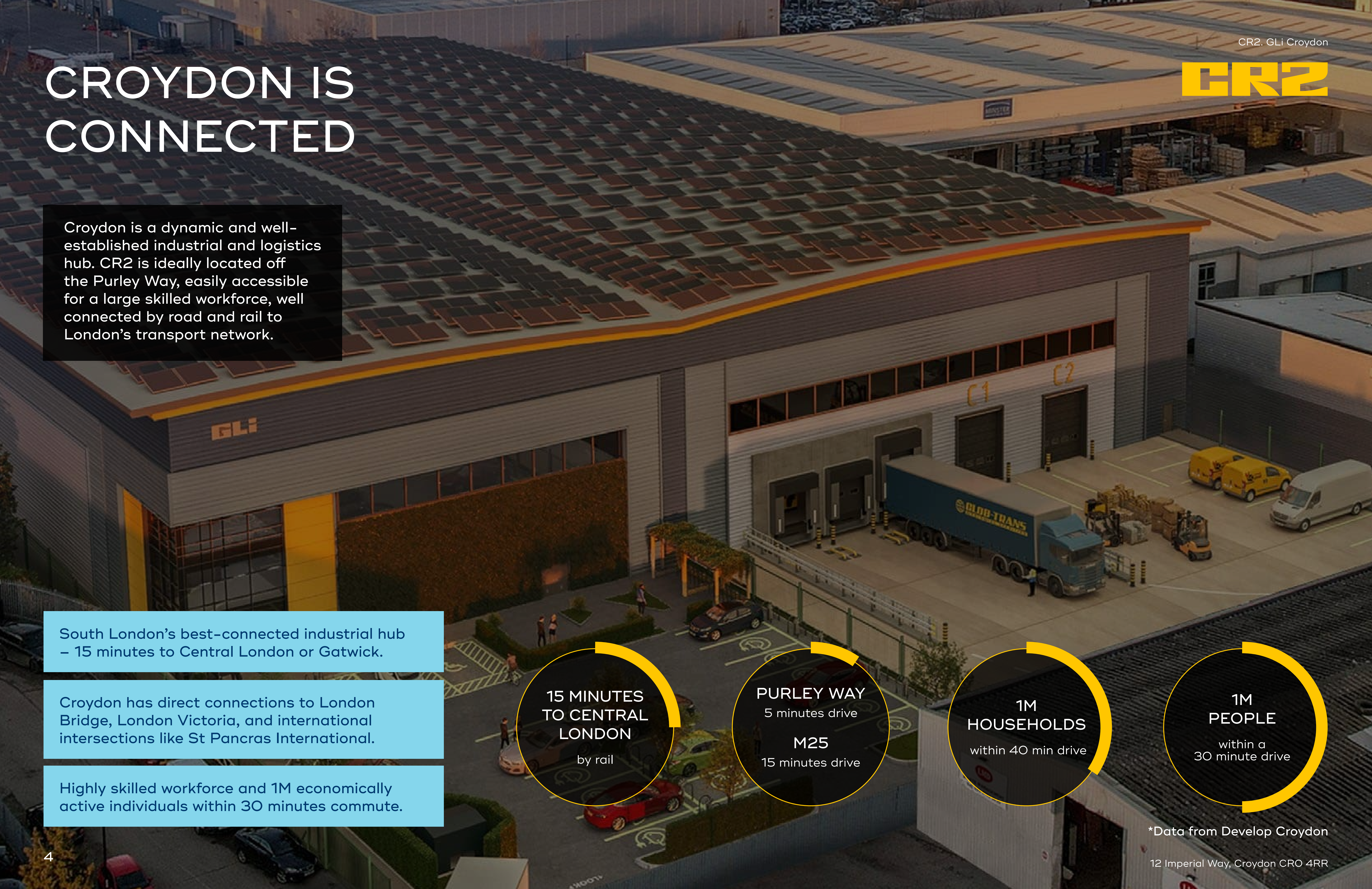
A future-proofed logistics warehouse designed to save energy and operational costs. CR2 will optimise your supply chain and delivers 50% more volume than the standard 8m Croydon unit. It includes the option of a 37,000 sq ft mezzanine expansion that increases floor space to 89,605 sq ft. Maximum rooftop solar PV delivers a £60,000 energy cost savings p.a.*

55,165 SQ FT
OPPORTUNITY TO EXPAND INTO CR2
Combined CR1+CR2 total of 107,770 SQ FT

*Details available on request

CR2

CROYDON IS CONNECTED



Croydon is a dynamic and well-established industrial and logistics hub. CR2 is ideally located off the Purley Way, easily accessible for a large skilled workforce, well connected by road and rail to London's transport network.

South London's best-connected industrial hub – 15 minutes to Central London or Gatwick.

Croydon has direct connections to London Bridge, London Victoria, and international intersections like St Pancras International.

Highly skilled workforce and 1M economically active individuals within 30 minutes commute.

15 MINUTES TO CENTRAL LONDON
by rail

PURLEY WAY
5 minutes drive

M25
15 minutes drive

1M HOUSEHOLDS
within 40 min drive

1M PEOPLE
within a 30 minute drive

*Data from Develop Croydon

12M
CLEAR HEIGHT

THREE DOCK LEVEL LOADING DOORS

TWO LEVEL ACCESS LOADING DOORS

26 CAR PARKING (100% EV)
8 VAN PARKING (100% EV)

850KVA
TOTAL POWER

50 KN/M²
FLOOR LOADING

N

NOT TO SCALE
Indicative only

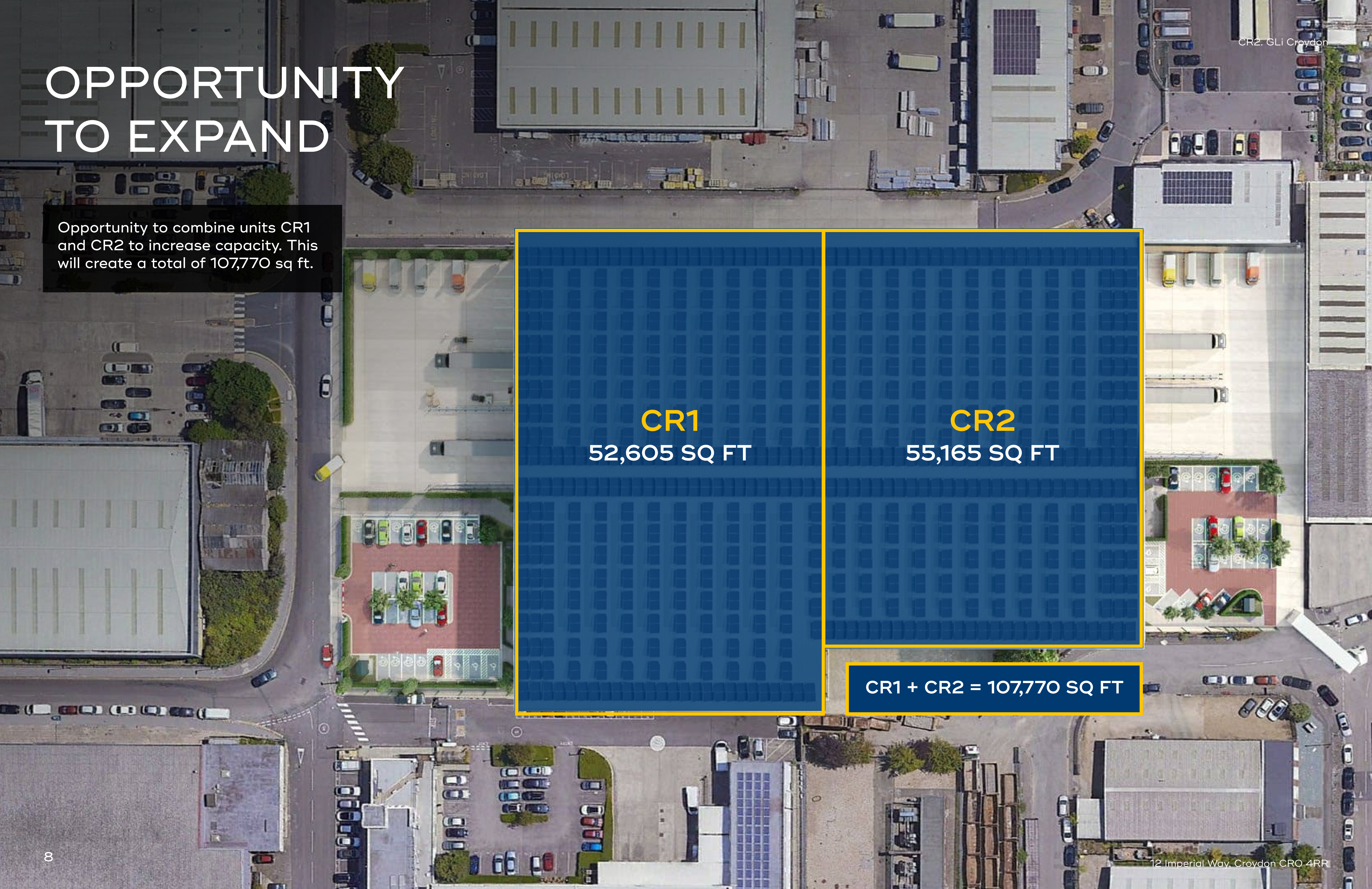
CR2	SQ FT	SQ M
WAREHOUSE	44,995	4,180
OFFICE (INCL. CORE)	10,170	885
TOTAL AREA	**55,165**	**5,124**

OPPORTUNITY TO COMBINE WITH CR1 FOR TOTAL 107,770 SQ FT
Available Q1 2025

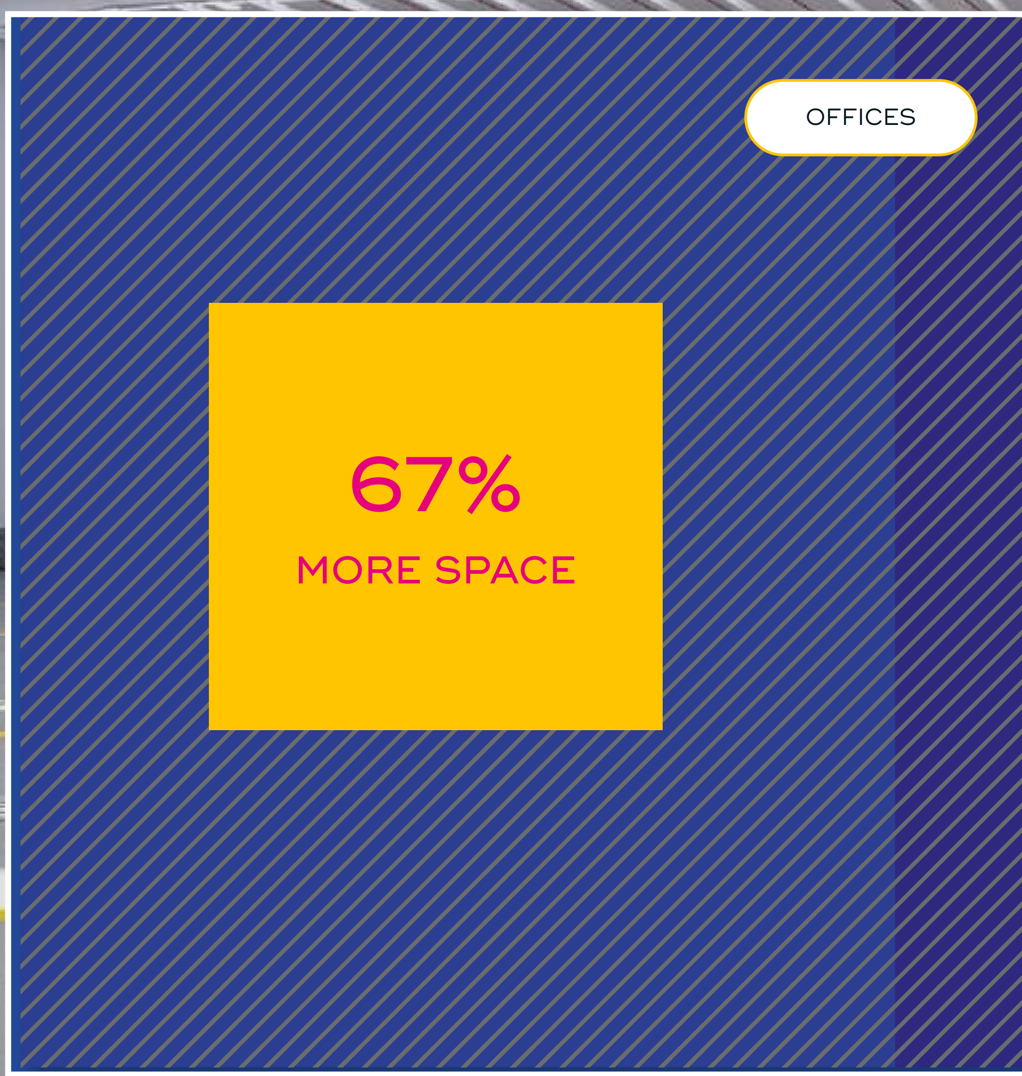
All areas are approximate and calculated on a gross external basis (GEA).

OPPORTUNITY TO EXPAND

Opportunity to combine units CR1 and CR2 to increase capacity. This will create a total of 107,770 sq ft.



A SIZEABLE CHANGE



BENEFITS OF 12M HEIGHT

- Option to add up to an additional 37,000 sq ft mezzanine that means 67% more operating space and even greater business flexibility
- Ideal for the Food Sector
- Ideal for Logistics and Distribution
- Ideal for Manufacturing and Engineering

REVOLUTION IN FLEXIBILITY

BENEFITS OF 12M HEIGHT

- 50% more pallets than an 8M warehouse
- Providing even more flexibility

6,510	Pallet Locations (VNA)
4,986	Pallet Locations (WA)

4M HIGHER THAN A STANDARD 8M CROYDON WAREHOUSE

12M clear height offers 50% more volume than 8M warehouses. That means one more additional tier of pallets.

DELIVERING A SUSTAINABLE REVOLUTION

CR2's future-proofed, innovative design lowers occupier energy and operational costs. EPC A+ and BREEAM Excellent targets prepare the property for the regulatory impacts of London Zero 30.

- Supporting Corporate Sustainability Goals
- Exceeding London Zero 30 Regulatory Requirements
- Saving Operational Costs with Efficient 100% EV Van Fleet Charging

MAXIMUM CAPACITY SOLAR PV

12 BICYCLES STORAGE

RAINWATER HARVESTING

GREEN LIVING WALL

LED LIGHTING
75% LESS ENERGY
25% MORE DURABILITY

SUB-METERING OF ENERGY CONSUMPTION

100% ELECTRIC

NET ZERO CARBON STATUS

BREEAM
EXCELLENT
TARGETED

CARBON NEUTRAL BUILD

TARGET EPC A+

BATTERY READY

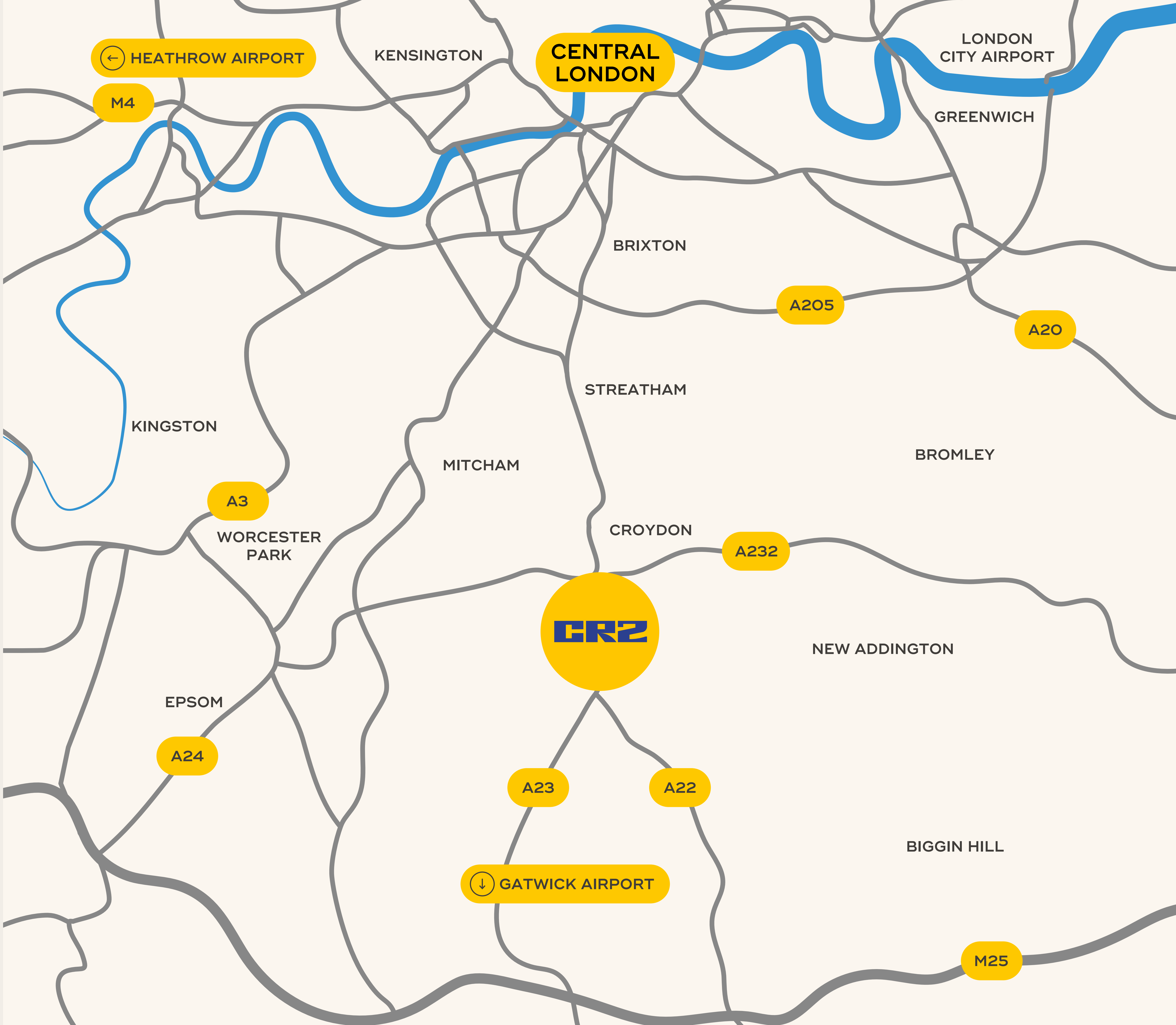
CROYDON BY ROAD

DRIVE TIMES (MINS)

M23	24
M25	18
CENTRAL LONDON	50
GATWICK	27
HEATHROW	53

GOOGLE MAPS

///MOTEL.MOVIES.VISION



JOIN THE CROYDON REVOLUTION

INTERNATIONALLY CONNECTED BY AIR

NATIONALLY CONNECTED BY RAIL

NATIONALLY CONNECTED BY ROAD

The Croydon industrial area is the industrial and logistics hub for businesses of the future.

It is situated in a prime location for those serving customers in London and the southeast.

Average annual income per annum £49,000

750,000 skilled workforce on your doorstep

Global occupiers already in Croydon include, Amazon, DHL, Evri, Digital Realty, Oddbox, Peleton and Tropic Skincare

CROYDON TRANSPORT

TRAIN

1.9 MILES

EAST CROYDON — +9 — CLAPHAM JUNCTION — +8 — LONDON VICTORIA

EAST CROYDON — +12 — LONDON BRIDGE — +5 — LONDON BLACKFRIARS

SOUTHERN

WEST CROYDON — +7 — NORWOOD JUNCTION — +4 — CRYSTAL PALACE — +11 — CLAPHAM JUNCTION — +8 — LONDON VICTORIA

WINDRUSH LINE

1.6 MILES

WEST CROYDON — +23 — NEW CROSS GATE — +6 — CANADA WATER — +7 — WHITECHAPEL — +12 — HIGHBURY & ISLINGTON

TRAMLINK

WIMBLEDON — +30 — MITCHAM JUNCTION — +16 — WEST CROYDON — +10 — EAST CROYDON — +40 — BECKENHAM JUNCTION

BUSES

0.3 MILES · 154 STOP EL

+4 — WADDON LEISURE CENTRE/ FIVEWAYS — +2 — WADDON STATION — +12 — PARK LANE/ FAIRFIELD HALLS — +1 — WHITGIFT CENTRE — +3 — WEST CROYDON BUS STATION

0.4 MILES · 119 STOP NG

+19 — EAST CROYDON STATION — +2 — SANDILANDS TRAM STOP — +38 — BROMLEY SOUTH STATION — +7 — BROMLEY NORTH STATION

EMPLOYEE WELLBEING

The best skilled labour force is vital in today's competitive market. CR1 is designed to attract and retain the best employees in London. It offers a state-of-the-art, vibrant workspace:

- Modern warehouse space alongside interior designed office facilities matching to Central London office standards.
- Light, comfortable environment for employee wellbeing
- Cycle storage (including electric bike charging), and employee showers
- Sustainable, landscaping and EV charge points for private cars

CR1 has been designed with employee wellness in mind.

- Natural Light
- Comfort Cooling and Heating
- Employee Showers
- Break out Spaces
- Well Design Principles
- Bio-diverse Landscaping

GLi CROYDON

CR2

LAST WORD IN LAST MILE

CR2 is part of the extensive and award-winning GLi London platform, a portfolio of next generation warehouses with multiple sites across London within the M25.

Our properties are designed to save occupier energy costs and maximise operating efficiency. Our vision is to regenerate the vital industrial areas serving the London population, creating the best buildings in the best possible locations.

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