



London Borough of Redbridge

Retail Site Opportunities Assessment

FINAL Report

December 2015

Address: Ropemaker Court, 12 Lower Park Row, BS1 5BN

Tel: 0117 925 4394

Email: planners.bristol@wyg.com

Web: www.wyg.com





Document Control

Project: A094355
File Origin: A094355/Retail Site Opportunities Assessment

Document Checking:

Prepared by: Simon Metcalf	Signed: 
----------------------------	---

Checked by: Tristan Hutton	Signed: 
----------------------------	---

Issue	Date	Status
1	13/11/2015	First Draft
2	24/11/2015	Revised Draft
3	11/12/2015	DRAFT





Contents Page

1.0	Introduction	1
1.1	Instruction	1
1.2	Structure of Report	1
2.0	Key Planning Policy and Objectives	2
2.1	NPPF	2
2.2	Local Policy	2
3.0	The Quantitative Retail Capacity Projections.....	4
3.1	Introduction.....	4
4.0	Locations to Accommodate Growth	6
5.0	Summary of Site Assessments.....	8
6.0	Capacity to Meet Identified Need.....	13
6.2	Convenience floorspace	14
6.3	Comparison floorspace	15
7.0	Conclusions.....	16

Appendix Contents

Appendix 1 – Plan of Town Centres in London Borough of Redbridge

Appendix 2 – Full Site Assessments





1.0 Introduction

1.1 Instruction

- 1.1.1 WYG Planning (hereafter referred to as 'WYG') was commissioned by the London Borough of Redbridge ('the Council') in September 2015 to undertake a Retail Site Opportunities Assessment for the London Borough of Redbridge.
- 1.1.2 The principle purpose of the assessment was to assess the availability and suitability of thirty sites identified by the Council to deliver retail floorspace over the emerging plan period (to 2030) to meet identified retail needs. WYG has also been appointed to undertake an assessment of the quantitative retail needs for the borough. The assessment forms a separate bound study titled 'Quantitative Retail Capacity Assessment'. WYG has not been appointed to undertake any qualitative assessment/needs for the centres in Redbridge.
- 1.1.3 This assessment outlines the relevant planning policy context, nationally and locally, clarifies the floorspace requirements to be met over the plan period (to 2030) and provides a summary of the site assessments undertaken and ability to meet the need in full

1.2 Structure of Report

- 1.2.1 Our report is structured as follows:
- Section 2 provides a summary of relevant planning policy context;
 - Section 3 sets out the quantitative retail projections based on the separate study undertaken by WYG;
 - Section 4 considers the locations identified to accommodate the required retail growth;
 - Section 5 provides a summary of the thirty site assessments undertaken;
 - Section 6 considers the capacity of the sites to meet the identified retail need; and
 - Section 7 provides our conclusions.



2.0 Key Planning Policy and Objectives

2.1 NPPF

2.1.1 The NPPF (Para 23) clarifies that in seeking to ensure the vitality of town centres a range of suitable sites should be allocated to meet the scale and type of retail development needed in town centres over the specified plan period. It advises that such needs should be met in full and should not be compromised by limited site availability. Consideration should be given as necessary to expand existing town centres to ensure a sufficient supply of suitable sites is available.

2.1.2 The NPPF (Para 24) goes on to set out a clear sequential approach to meeting retail needs and as such town centre sites should be the first choice of location to meet identified needs. Consideration must also be given to the existing retail hierarchy and the need to respect this given the context of the emerging Local Plan. Development proposed should reflect the scale of a centre in which it is located and any change in the hierarchy should be managed through the emerging Local Plan.

2.2 Local Policy

2.2.1 The development plan for the London Borough of Redbridge includes:

- The Core Strategy DPD, adopted March 2008.
- The Borough Wide Primary Policies DPD, adopted May 2008.
- The Development Sites with Housing Capacity DPD, adopted May 2008.
- The Development Opportunity Sites DPD, adopted May 2008.
- The Ilford Town Centre Area Action Plan DPD, adopted May 2008.
- The Gants Hill District Centre Area Action Plan DPD, adopted May 2009.
- The Crossrail Corridor Area Action Plan DPD, adopted September 2011.

2.2.2 Key elements of these documents of relevance to assessing the merits of sites include:

- The spatial vision set out in the Core Strategy to strengthen the role of Ilford as a Metropolitan centre, providing a focus for retail and commercial development in the Borough.



- Promotion of smaller district and local centres to meet immediate needs of the local population.
- The Core Strategy seeks to locate additional retail floorspace in Ilford Town Centre, whilst promoting additional floorspace in other centres commensurate with local needs and the retail hierarchy (Strategic Policy 4). This policy also reiterates the sequential approach to development.
- It is noted that a number of the DPD documents identify opportunity sites; it is from these sites that the Council has identified the thirty sites that this report assesses in terms of potential meeting the need for further retail floorspace.



3.0 The Quantitative Retail Capacity Projections

3.1 Introduction

- 3.1.1 WYG have examined the quantitative need for new convenience and comparison goods floorspace over the five year reporting periods to 2030 (i.e. at 2015, 2020, 2025 and 2030) in a separate assessment, 'Quantitative Retail Capacity Assessment'. As identified in that assessment, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time.
- 3.1.2 The projections are based upon the existing centres within Redbridge maintaining their existing market shares of expenditure within the study area. Clearly this assumption can vary depending upon numerous factors including development in competing centres and changes in shopping behaviour.
- 3.1.3 It should also be noted that much of the growth in expenditure is based upon an increase in per capita expenditure over the plan period. Should the level of growth be more modest than forecast, then the need to accommodate growth will be reduced. As such a degree of caution should be applied and the forecasts should be used a guide for the level of growth that should be accommodated.
- 3.1.4 The need for additional floorspace has also taken into account the potential for existing retail floorspace in the study area to increase its turnover efficiency.
- 3.1.5 Whilst not appointed to undertake a qualitative assessment of the centres in Redbridge, it was observed in those centres that were visited through our work, that there are a number of vacant units. The level of vacancy is a key indicator of the health of a centre but a degree of vacancy is to be expected in a centre to allow for a healthy churn of units. It is clear that there is currently available floorspace in vacant units which could make a contribution to accommodating future retail capacity requirements.
- 3.1.6 In order to be robust, clarification on any retail commitments were sought from the Council and were duly provided. These commitments have been taken into account in determining the level of additional retail floorspace required.



3.1.7 The projections for retail floorspace requirements have been expressed as ranges to take account of varying sales densities. Figures 3.1 and 3.2 below are a summary of the convenience and comparison floorspace capacity based upon the WYG Quantitative Retail Capacity Assessment.

Figure 3.1: Summary Convenience Floorspace Capacity

	2015	2020	2025	2030
Minimum Floorspace Capacity Requirements after Commitments (sq m net)	-	4,825	6,837	8,562
Maximum Floorspace Capacity Requirements after Commitments (sq m net)	-	9,620	13,631	17,071

Figure 3.2: Summary Comparison Floorspace Capacity

	2015	2020	2025	2030
Minimum Floorspace Capacity Requirements after Commitments (sq m net)	-	-618	11,293	23,911
Maximum Floorspace Capacity Requirements after Commitments (sq m net)	-	-1,031	18,822	39,851

3.1.8 The projections to 2030, taking account of commitments, suggest there is scope for between 23,911 – 39,851 sq m (net) of comparison retail floorspace and between 8,562 – 17,071 sq m (net) of convenience retail floorspace.

3.1.9 It is this level of growth which is sought to be accommodated to ensure Redbridge provides sufficient sites to meet the retail needs in full over the plan period.



4.0 Locations to Accommodate Growth

4.1.1 This section of the report considers the locations within the Study Area where growth could be accommodated.

4.1.2 The Council has a clear hierarchy of centres set out in the development plan:

- Metropolitan Centre – Ilford
- District Centres – Barkingside, Chadwell Heath, Gants Hill, South Woodford and Wanstead
- Local Centres – Goodmayes, Ilford Lane, Manford Way, Newbury Park, Seven Kings, Woodford Bridge and Woodford Broadway/Snakes Lane.

4.1.3 In addition to these centres there are numerous 'Key Retail Parades' identified across Redbridge.

4.1.4 In terms of consideration of sites to accommodate future growth, generally there would be both a qualitative and quantitative assessment of where best to accommodate growth. In this case the Council requested WYG undertake a quantitative assessment only and identified a total of thirty sites that should be assessed in terms of their suitability and availability to meet the identify need for additional retail floorspace in Redbridge. It is noted that qualitative assessments of the centres have previously been undertaken by the Council.

4.1.5 The thirty sites identified by the Council for assessment were all sites that had been previously identified as having some potential for development in adopted Area Action Plans or other Development Plan Documents. All the sites were either in designated town centres or in edge-of-centre locations in general accord with the sequential approach to site selection set out in the NPPF.

4.1.6 The sites assessed were concentrated in the Metropolitan centre of Ilford and then primarily in the District and Local Centres along the Crossrail Corridor. The Crossrail Corridor being an area which is identified for future growth in the existing development plan and emerging Local Plan. As such the geographic spread of sites across Redbridge is assessed to generally be in line with the areas likely to experience an uplift in population and therefore expenditure growth over the plan period.

4.1.7 The distribution of the thirty sites assessed across the retail hierarchy are summarised in Figure 4.1 below:



Figure 4.1: Distribution of sites assessed

Centre	Number of sites assessed
Ilford Metropolitan Centre	11
Chadwell Heath	3
Gants Hill	6
Goodmayes	5
Manford Way	1
Seven Kings	3
Woodford Broadway/Snakes Lane	1

4.1.8 In terms of geographic spread of the sites across Redbridge, this is captured in the plan at **Appendix 1**. It should be noted that sites identified by the Council and assessed by WYG do not encompass all identified centres in Redbridge.



5.0 Summary of Site Assessments

5.1.1 This section of the report provides a summary of the sites assessed. The 30 identified sites were all assessed in terms of their potential to accommodate future retail growth to meet Redbridge's needs. The full site assessments are attached at **Appendix 2** and take account of the following factors:

- Existing land uses;
- Surrounding land uses;
- Planning policy matters;
- Planning history;
- Accessibility; and
- Potential constraints to development.

5.1.2 We have provided a summary of the site assessments in Figure 5.1 overleaf. This summarises the potential scale of additional retail development, character of potential development, timescales for delivery and suggests a level of potential floorspace for each site based on the assessment undertaken.

5.1.3 The scale of development for the purposes of the table has been defined as follows:

- Small scale – up-to 1,000 sq m (gross) floorspace
- Medium scale – 1,000 – 2,500 sq m (gross) floorspace
- Large scale – in excess of 2,500 sq m (gross) floorspace

5.1.4 In terms of timescales set out in the timetable, these are summarised as short, medium or long term:

- Short term – prior to 2021
- Medium term – 2021-2026
- Long term – 2026-2030



5.1.5 The extent of the assessments at this point, whilst identifying whether sites are in single or multiple ownership, do not go as far to explore the length of unexpired leases, restrictive covenants nor have there been discussions with site owners as to their intentions/aspirations for sites. As such the site assessments provide a useful guide as to the suitability and availability of sites to meet future growth but are not definitive. In addition, the information and conclusions of the site assessments do not imply that retail development on the sites will be granted planning permission by the Council.



Figure 5.1: Summary of site assessments

Site	Potential scale of development	Character of development	Timescales	Potential A1 Retail Floorspace (sq m gross)	
Ilford					
ITCOS7	Land adjacent to Cranbrook Road, High Road & the railway	Large	Potential for multi-storey large scale retail development	Long term	In excess of 2,500 sq m
ITCOS8	Site bounded by Chapel Road, High Road & Clements Lane	Large	Potential for multi-storey large scale retail development	Short term	Circa 6,000 sq m
ITCOS9	Land adjacent to Clements Lane and Clements Road	Medium	Potential for multi-storey large scale retail development	Short term	Circa 1,500 sq m
ITCOS11	Land bounded by Clements Road, Chadwick Road & Postway Mews	Large	Multit storey high street retailing	Medium term	In excess of 2,500 sq m
ITCOS12	112-114 High Road	Small	Multi-storey high street retail development	Medium term	Circa 1,000 sq m
ITCOS13	Town Hall Car Park	Medium	Mixed use development of the site including retail and food and drink	Short term	Circa 2,000 sq m
ITCOS15	Kenneth More Theatre	Small	Mixed use development of the site including retail and food and drink	Medium term	Circa 850 sq m
ITCOS16	177-207 High Road	Large	Multi-storey high street retail development	Short term	In excess of 3,000 sq m
ITCOS25	Redbridge Enterprise and Ilford Retail Park	Medium	Redevelopment and re-provision of retail floorspace	Long term	Circa 1,500 sq m
LO05	Peachy House, 39 Ilford Hill	Small	Small scale retail as part of a residential led scheme	Short term	Circa 300 sq m



L006	Sainsbury's, Roden Street,	Medium	Mixed retail and residential scheme (possible extension to existing foodstore)	Medium term	Circa 5,000 sq m
Ilford Metropolitan Centre totals					<u>Minimum 26,150 sq m</u>
Gants Hill					
GHOSA	Wentworth House, Eastern Avenue	Medium	Ground floor retail with residential/commercial above	Medium term	Circa 1,500 sq m (potential for a small foodstore)
GHOSB	Eastern Avenue Storage Buildings, Eastern Avenue	Medium	Ground floor retail with residential/commercial above	Long term	Circa 2,000 sq m (potential for a small foodstore)
GHOSC	Commercial House, Eastern Avenue	Small	Ground floor retail with residential/commercial above	Medium term	Circa 800 sq m
GHOSD	Montrose House, Eastern Avenue	Small	Ground floor retail with residential/commercial above	Medium term	Circa 1,000 sq m
GHOSF	Woodford Avenue/Eastern Avenue Corner	Small	Re-provision of existing high street retail, food and drink and services	Medium term	Circa 1,000 sq m
GHOSG	Woodford Avenue/ Cranbrook Road North	Small	Re-provision of existing high street retail, food and drink and services	Long term	Circa 1,000 sq m
Gants Hill District Centre totals					<u>Minimum 7,300 sq m</u>
Chadwell Heath					
CCOS21	Corner of Wangey Road and Station Road	Small	Ground floor retail with residential/commercial above	Medium term	Circa 200 sq m
CCOS22	1145 (Alfa Romeo) High Road	Small	Ground floor retail with residential/commercial above	Short term	Circa 400 sq m
CCOS23	1171 (Kia) High Road	Small	Ground floor retail with residential/commercial above	Short term	Circa 500 sq m
Chadwell Heath District Centre totals					<u>Minimum 1,100 sq m</u>



Goodmayes					
GM07	58-64 Goodmayes Road	Small	Redevelopment of existing retail site	Short term	Limited net gain in floorspace
CCOS10	706 - 720 (Homebase) High Road	Small	Redevelopment of existing retail site	Medium term	Limited net gain in floorspace
CCOS11	822 (Tesco) High Road	Large	Redevelopment of site or extension to existing foodstore	Medium term	In excess of 2,500 sq m
CCOS12	Goodmayes Retail Park, High Road	Small	Redevelopment of existing retail park and/or extension	Medium term	Circa 500sq m
CCOS19	55 - 61 Goodmayes Road	Small	Redevelopment of existing retail site	Medium term	Circa 500sq m
Goodmayes Local centre totals					<u>Minimum 3,500 sq m</u>
Seven Kings					
CCOS07	The Joker Public House, Cameron Road	N/A	N/A	N/A	N/A
SK02	674-700 High Road	Small	Small scale redevelopment/extension of existing premises	Medium term	Circa 1,000 sq m
SK06	Seven Kings Car Park & Lorry Park, High Road	Medium	Small scale high street provision	Short term	Circa 1,500 sq m
Seven Kings Local Centre totals					<u>Minimum 2,500 sq m</u>
Manford Way					
HA06	Alfred's Head PH, Manford Way	Medium	High street retailing or small foodstore	Medium term	Circa 1,500 sq m
Woodford Broadway/Snakes Lane					
MO01	2-4 Charteris Road & Woodford Station,	Small	Small scale retailing and re-provision of car parking	Medium term	Circa 1,000 sq m



6.0 Capacity to Meet Identified Need

- 6.1.1 The quantum of floorspace for each site assessed to be able to be delivered is an estimate only and could vary depending on site circumstances, design and the ability to fully assemble or even expand sites. The floorspaces identified in this report are therefore a guide.
- 6.1.2 On the basis of the site assessments undertaken, between the thirty sites, these are estimated to have the potential to deliver a minimum of 43,050 sq m (gross) of additional retail floorspace over the plan period. This is likely to be a conservative estimate, as the lower end of floorspace estimates have been taken in calculating this figure. This is particularly the case for the larger sites in central locations in Ilford Metropolitan Centre, where there may be significant potential for retail development to be delivered on multiple floors subject to market demand and location.
- 6.1.3 It should be noted that in providing net retail floorspace figures a gross to net ratio of 70%/30% has been applied. This is considered to be a realistic split given the urban context of the sites in question.
- 6.1.4 The cumulative capacity of the opportunity sites in the centres can be summarised as follows:

Centre	Potential capacity of sites within the centres (gross)	Potential capacity of sites within the centres (net)*
Ilford Metropolitan Centre	26,150 sq m	18,305 sq m
Chadwell Heath	1,100 sq m	770 sq m
Gants Hill	7,300 sq m	5,110 sq m
Goodmayes	3,500 sq m	2,450 sq m
Manford Way	1,500 sq m	1,050 sq m
Seven Kings	2,500 sq m	1,750 sq m
Woodford Broadway/Snakes Lane	1,000 sq m	700 sq m
Totals	43,050 sq m	30,135 sq m

(* - gross to net ratio of 70%/30%)



6.1.5 The capacity identified reflects the suitability and availability of each site assessed and also their position in the retail hierarchy. As would be expected the bulk of capacity is assessed to be able to be met in Ilford Town Centre, with lower levels of growth in the District and Local Centres in the Borough.

6.2 Convenience floorspace

6.2.1 Of the identified capacity, up to 10,250sq m(gross / 7,175sq m net floorspace is assessed to be specifically suitable for convenience floorspace, either through the extension of existing foodstores or provision of new foodstores in some centres, where this is commensurate with their position in the retail hierarchy. It is unlikely all of this floorspace would come forward for convenience retailing, particularly where there is more than one site in a centre with potential for a foodstore.

6.2.2 This convenience floorspace is split between sites in Ilford, the District and Local Centres and in particular has regard to the content of adopted AAP's. This total capacity would, over the plan period to 2030, fall marginally short of the minimum identified requirements (by approximately 1,400 sq m net). However, the figures assume delivery of convenience floorspace through supermarkets or extensions, floorspace would also be delivered through smaller convenience units. Such provision would increase the total convenience retail floorspace. In addition, a significant uplift in convenience floorspace could be achieved in the event one of the sites delivers a large scale foodstore within or close to one of the higher order centres.

6.2.3 Also it should be noted that the sites assessed were geographically limited and did not cover all centres within Redbridge. There was also no qualitative assessment of centres to understand the capacity of vacant units to meet identified need. These additional centres and vacant units across Redbridge will also have some capacity to meet the identified need for further convenience retail floorspace.

6.2.4 The sites identified specifically to have potential for convenience capacity are identified as medium or long term opportunities, there is therefore likely to be a short fall in provision over the short term. This would therefore suggest that the availability of sites and assessment of need for convenience floorspace should be revisited prior to 2020 to ensure a continued supply of suitable and available sites in the latter part of the plan period.



6.3 Comparison floorspace

- 6.3.1 It is estimated that the sites assessed have the ability to deliver in the order of 32,800 sq m gross / 22,960 sq m net of comparison retail floorspace over the plan period. The vast majority of this, approximately 23,650 sq m gross / 16,555 sq m net, is assessed to be able to be delivered on sites in Ilford Town Centre, with the remainder spread across sites in the lower order centres. These figures take account of commitments and also assume delivery of convenience floorspace as set out above.
- 6.3.2 There is therefore estimated to be a marginal shortfall in capacity on the sites identified to meet the minimum comparison retail needs over the plan period (23,911 sq m). The shortfall is approximately 1,000 sq m net. Based on previous qualitative assessments we are advised by officers of the Council that the limited shortfall in floorspace could be met through the occupation of vacant units in designated centres.
- 6.3.3 The marginal shortfall in sites would also suggest that an update of sites available and suitable to meet identified retail needs should be undertaken in the medium term to review delivery and to ensure sufficient sites remain for the plan period. This would reflect that the bulk of comparison floorspace is estimated to be delivered in the short to medium term based on the assessments undertaken.



7.0 Conclusions

- 7.1.1 On the basis of existing commitments in Redbridge and the conservative assessment of the opportunity sites, it is assessed that there is sufficient capacity within the thirty sites identified by the Council together with the reoccupation of vacant floorspace across Redbridge, to meet the minimum floorspace capacity requirements over the plan period to 2030.
- 7.1.2 Given that the capacity of the sites identified by the Council alone falls marginally short of the minimum floorspace required to meet the identified capacity requirements, an early review (prior to 2020) of capacity and delivery of sites is recommended to ensure that there is a clear understanding of delivery and to allow a clear assessment of whether there is a need to identify and assess further sites.
- 7.1.3 At that point consideration could also be given to a qualitative assessment of all centres in Redbridge to ascertain whether there are sites emerging within those centres that could appropriately contribute to capacity requirements going forward. Such an assessment could also identify the quantum of floorspace in vacant units which could contribute towards meeting identified need.
- 7.1.4 Early review is also considered particularly prudent given that the capacity requirements are based on retaining market share only and towards the minimum range of floorspace required. If there is a failure in identified sites coming forward, particularly in Ilford, then the retail market shares are likely to fall, which could be to the detriment of the town centres.



Appendices





Appendix 1 – Plan of Town Centres in London Borough of Redbridge





Appendix 2 – Full Site Assessments



