
Fife Retail Capacity Study 2015



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Introduction

CH2M HILL and Maria Francké Planning were instructed by Fife Council to prepare this Retail Capacity Study Update for 2015. This study is informed by and replaces the Council's previous '2014 Fife Retail Capacity Study 2014' (2014 FRCS).

This report is more limited in scope than the 2014 report. Its main purpose is to provide updated information to support the existing West, Mid and East Fife Local Plans and the Proposed FIFEplan, which shall replace the three adopted Local Plans covering Fife.

The terms of reference are:

- To provide updated retail information for the Fife Local Development Plan
- To quantify the extent of expenditure leakage from Fife and the three sub areas in Fife by retail category
- To quantify the scope for additional retail floorspace in Fife and three sub areas for the period 2015-2020
- To provide a broad indication of the likely scope for additional retail floorspace for the period 2020-2025
- To provide a range of retail capacities based on varying levels of population change in and across Fife
- To take account of major retail proposals in and around Fife that could influence retail shopping patterns
- To provide qualitative data and expert opinion to underpin and support the quantitative research
- To advise on a strategy to reduce retail leakage from Fife

In addition to the above objectives, the study provides a summary of current and emerging local, regional and national retail planning policy and consideration of market trends.

This report is structured as follows:

- Section 2 sets out our review of national, strategic and local planning policies relevant to retail planning in Fife
- Section 3 explains the quantitative assessment methodology and our assumptions used
- Sections 4 and 5 set the quantitative capacity forecasts for new retail provision within Fife
- Section 6 summarises our findings

Planning Policy Context

In this section we examine the key features of national, regional and local planning policy guidance to provide the context and framework for this study.

2.1 National Policy

2.1.1 SSP (June 2014)

SPP sets out the Scottish Government's policy on how the planning system should promote town centres to help create successful, sustainable places. There are four broad policy principles in paragraph 60 which state that the planning system should:

- Apply a town centre first policy when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities
- Encourage a mix of uses in town centres to support their vibrancy, vitality and viability throughout the day and into the evening
- Ensure development plans, decision-making and monitoring support successful town centres
- Consider opportunities for promoting residential use within town centres where this fits with local need and demand

In preparing the Fife Local Development Plan (FIFEplan LDP) SPP (paragraph 61) requires the Council to identify a network of centres, the relationships between them, their roles and status. It states that plans should identify the following key characteristics when considering the definition as to what constitutes a town centre:

- A diverse mix of uses, including shopping
- A high level of accessibility
- Qualities of character and identity which create a sense of place and further the wellbeing of communities
- Wider economic and social activity during the day and in the evening
- Integration with residential areas

In terms of retail planning, the SPP retains emphasis on the provision of a network of centres; the improvement of town centres; and taking the sequential approach to the location of new retail development. Paragraph 71 reaffirms the gross floorspace threshold of over 2,500 sq. m for undertaking a retail impact analysis, where a retail and leisure development is proposed outwith a town centre and contrary to the development plan.

2.2 Regional Policy

2.2.1 The SESplan

The most recent SESplan was approved by Scottish Ministers in June 2013. The SESplan applies to the area of West and Mid Fife, and allocates North Dunfermline and the Ore / Upper Leven Valley as strategic development areas for growth and development.

In terms of town centres and retailing Table 1: 'Network of Centres' identifies Dunfermline, Glenrothes and Kirkcaldy as Strategic Town Centres.

Policy 3 of the SESplan sets out that Local Development Plans (LDPs) are required to identify town centres and commercial centres and clearly define their roles. It also sets out that they should promote the network of centres and identify measures necessary to protect them, including setting out the criteria to be addressed when assessing development proposals. The policy also reiterates the promotion of the sequential approach to the selection of locations for retail and commercial leisure proposals.

2.2.2 The TAYplan

The most recent TAYplan was approved by Scottish Ministers in June 2012. The TAYplan applies to the area of East Fife and allocates Cupar North and St Andrews West and Science Park as strategic development areas that will contribute to the economic success of the region.

In terms of the 'Hierarchy of Comparison Retail Centres', Dundee is identified as the regional centre and Perth is identified as the sub-regional centre. Fife is represented by St. Andrews and Cupar, which are identified as 'larger town centres'. Anstruther and Newburgh are also classified as 'smaller town centres' (Policy 7, Table 2). As set out previously, Cupar North is identified as strategic development area, and includes the provision of bulky goods retailing (Policy 4, Table 1).

The next TAYplan is currently at the early stages of development. The Main Issues Report was published for consultation in April 2014, with further consultation to follow.

2.3 Local Policy

The Fife area is covered by three adopted local plans:

- Dunfermline & West Fife Local Plan (November 2012)
- Mid Fife Local Plan (January 2012)
- St Andrews & East Fife Local Plan (October 2012)

All three local plans are reflective of Scottish Planning Policy in that they support the hierarchy of the retail centre network and the sequential approach for the location of new retail development.

2.3.1 Dunfermline & West Fife Local Plan

The Local Plan encourages retail growth in Dunfermline, which is identified as a sub-regional shopping centre. Other key proposals within the plan include retail growth in Inverkeithing, Kincardine, Dalgety Bay and Rosyth as local shopping areas.

2.3.2 Mid Fife Local Plan

Kirkcaldy is Mid Fife's principal town, and is the main focus for retail development. The Local Plan also indicates that retail growth will be directed to Glenrothes, Cowdenbeath and the Levenmouth area.

2.3.3 St Andrews & East Fife Local Plan

St. Andrews and Cupar are identified as 'District Town Centres' in the local plan and are the main focus for retailing in the area. St Andrews is one of the town centres in Fife regarded as key to Fife's economic growth. Its retail role is identified as serving more visitor and tourism needs, but with an emphasis on quality. Cupar is identified as the service centre for much of rural East Fife. The Local Plan proposes additional development in the town to enhance this function. This includes a new retail park to accommodate bulky goods retail to complement the retailing available within the town centre.

2.3.4 Proposed FIFEplan Local Development Plan

The three adopted Local Plans covering Fife shall be replaced by a single Local Development Plan (LDP) called FIFEplan. Together with TAYplan and SESplan strategic development plans, it will form the statutory Development Plan for Fife once adopted. The Proposed FIFEplan was submitted to the Scottish Ministers for Examination in August 2015.

In terms of town centres and retailing, the proposed FIFEplan notes that Fife Council has developed Business Improvement Districts (BIDS) in Kirkcaldy and Dunfermline. Businesses in St Andrews also voted this year to establish a BID and it is anticipated that this will be up and running by January 2016. The aim of the BIDS is to help develop and strengthen the town centres as hubs of activity so they can remain centres for commercial, community, and cultural activity.

A Town Centres First policy (Policy 6) is included in the proposed FIFEplan, supporting Fife's town centres as the locations of choice for new shopping, commercial, leisure, entertainment, and leisure uses. This is strong policy approach to supporting and investing in the development of town centres and is wholly in

line with the approach advocated in SPP. For the town centres and out of centre commercial centres, the plan proposes town centre and commercial centre frameworks, specifying the types of uses that would be appropriate in each centre. All proposals must comply with these frameworks.

A key change in the proposed FIFEplan is that the sequential approach will be applied at the retail market area level to reflect Fife's three retail catchment areas of East Fife, Mid Fife and West Fife, rather than the individual town level, using defined thresholds of gross floorspace for different land use class types. This is set out in Table 6.3 of the plan as a guide to the scale of development. For example, for convenience and comparison retail floorspace, the plan notes that extensions or changes to the restricted use of existing retail units of 1,000 square metres or more will also be subject to the sequential test. Retail Impact Assessments will be required for retail and leisure developments of more than 2,500 square metres gross floor area outwith a town centre where the site is not identified for a retail or leisure use in the Local Development Plan. The plan states that in other town centres, the focus will be on maintaining the existing retail provision. Any proposals for a change of use away from retail will be resisted, unless the building in question has been out of use for more than two years. In such cases the Council will require evidence of effective marketing for retail use over that period.

The commitment to the town centres first approach is continued in the policy approach to Fife's four out of town commercial centres. The plan states that the expansion of commercial centres beyond the current limits of their consents will not be supported during the lifetime of the Plan. It proposes that new development in commercial centres will be limited to the sale of bulky/DIY comparison goods or commercial leisure developments.

Quantitative Assessment Methodology and Data

3.1 Introduction

This section sets out the broad methodology used in assessing the quantitative capacity for convenience and comparison goods in Fife up to 2025. In accordance with the Council's brief, we have broken down our assessment of comparison goods need into 'bulky' and 'non-bulky' floorspace¹. We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the NEMS Household Telephone Survey (2009) of shopping patterns in Fife to model the flows of available expenditure to the three catchment areas.

The Study utilises the following methodology:

- Assess population increase over forecast period to 2025
- Assess residents' expenditure on convenience/comparison goods
- Calculate total available convenience/comparison goods expenditure
- Review residents' existing shopping patterns and flows of expenditure using 2009 NEMS Household Telephone Survey to establish the proportion of expenditure which is currently retained by the three catchment areas – that is, the current retention rate
- Review the trading level of existing stores
- Allow for 'claims' on the growth in retained expenditure as a result of:
 - floorspace efficiency change (that is the growth in turnover of existing retailers within existing floorspace)
 - growth over time in NSRT, mainly e-tail growth
 - planning commitments
- Utilising the information from the above steps, calculate the initial residual expenditure capacity which is potentially available for additional convenience and comparison goods floorspace

Population forecasts are provided by Experian along with the most recent information on local retail expenditure, as well as recommended deductions for non-store forms of retailing (e.g. internet) and recommended growth rates based on national expenditure patterns.

The current performance of convenience and comparison goods floorspace across Fife is then used as the basis for forecasting the need for additional retail floorspace up to 2025.

It is important to note that capacity forecasts become increasingly open to margins of error over time and will be influenced by potential changes in economic circumstances. The longer term projections in this study to 2025 should therefore be treated with caution. Assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data. The quantitative assessments are set out in detail in Appendix B for convenience goods and Appendix C for comparison goods.

3.2 Price Base

All monetary values expressed in this study are at 2012 prices.

3.3 Catchment Area

We have adopted the overall catchment area and 3 study zones used in the 2014 FRCS which are based on the findings of the NEMS Household Telephone Interview Surveys undertaken in 2009 (commenting where appropriate on changes that have occurred since).

¹ As defined by Experian Retail Planner Briefing Note 12.1 (October 2014), Appendix 2, bulky goods are defined as DIY goods, furniture and floor coverings; major household appliances whether electric or not; audio-visual equipment; remaining 10% of non-durable household goods and bicycles). Non-bulky goods are all other comparison goods (excluding 90% of non-durable household goods, which are included within the 'convenience goods' category).

A map of the Study Area is provided in Appendix A. The study area is postcode sector based and as such does not follow administrative boundaries precisely. Table 3-1 sets out the postcode areas which comprise each of the three catchment areas. As advised in the Council's previous Retail Studies (2013 and 2014), it is important to note that the three catchment areas differ slightly from the boundaries of the three local plan areas. The key differences are the inclusion of Cowdenbeath/Kelty in the West Fife retail catchment and Falkland/Ladybank in the Mid Fife retail catchment.

TABLE 3-1

Catchment Area Postcode Sectors

Catchment Area	Constituent Postcode Sectors
West Fife	KY4 0/8/9, KY5 0, KY5 8/9, KY11 1/2/7/9, KY11 3/4/8, KY12 0/7/8, KY12 9, FK10 4, KY2 5/6, KY3 0/9
Mid Fife	KY15 4/5, KY15 7, KY6 1/2/3, KY7 4/5/6, KY1 1/2/3/4, KY14 6/7, KY8 1/2/3/4, KY8 5/6
East Fife	KY16 0/8/9, DD6 8/9, KY10 2/3, KY9 1

Notes:

1. Postcode sector data taken from NEMS market research, Fife Household Survey, October 2009
2. In West Fife, FK10 3 has been removed and the population of Clackmannan has been excluded from FK10 4

3.4 Population

Population change is one of the most basic drivers of changes in consumer demand. The population forecasts provided by Experian consist of data from the 2011 Census, 2001 Census, 2012 based Population and Households Estimates, Population and Household Projections and Mosaic UK. For Fife, Experian used 2010 based projections. For the purpose of this Study, population and expenditure has been calculated at five year intervals to 2025 (i.e. at 2015, 2020, and 2025) (Table 1 in Appendices B and C).

The population projection for the whole of Fife at 2020 is 380,982, about 2% higher than the 2015 projection (372,693). Over the study period 2015 to 2025, there is a projected growth in population of 15,739 compared to a figure of 16,121 for the ten year period 2014-2024 reported in the 2014 FRCS. Table 3-2 provides a detailed breakdown of the forecast population change within each catchment area in each of the reporting periods to 2025.

TABLE 3-2

Catchment Area Population Projections

Catchment Area	2015	2020	2025	Growth 2015-25
West Fife	126,571	129,483	132,136	5,565
Mid Fife	178,270	182,220	185,713	7,443
East Fife	67,852	69,279	70,583	2,731
Total Fife	372,693	380,982	388,432	15,739

Notes:

1. Population data from Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife

3.5 Retail Growth and Special Forms of Trading

In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local Fife catchment population.

The base year for the Experian expenditure data is 2012. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1, which was published in October 2014. Forecast growth rates have been adopted as these represent a prediction of how retail expenditure is estimated to grow,

rather than being based on past trends. Trend-based growth rates have been more appropriately used in the past, when there was greater confidence in past trends continuing. It is considered that trends prior to the recession are unlikely to be replicated in the future due to the current economic uncertainty and the lack of available credit that has fuelled recoveries in consumer spending in the past. The long term forecast implies an annual average growth rate in the period 2015 to 2035 of 2.4%.

Experian's growth forecasts suggest that the slow economic growth over the forecast period will impact more upon comparison goods, where population growth is a main driver. It states:

"The significant deceleration in growth for comparison goods from the pace seen in 1973-2013 reflects a less pronounced globalisation effect on prices of electronics and clothing as well as the economic constraints posed by the need for fiscal restraint for several years to come;"

These economic constraints are reflected on the high street with retailers more reluctant to commit to new development than they have been in previous decades. Investment decisions regarding new store openings are more selective with retailers holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These economic changes on a year by year basis are reflected by Experian when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short and long term. Experian's forecast annual per capita convenience goods growth rate is -0.5% at 2014, +0.5% at 2015 and +0.4% at 2016². Comparatively in 2009, Experian's forecast growth for convenience goods per capita was a stronger +1.1% per annum across these same three reporting years³. For comparison goods, Experian identifies a relatively strong annual per capita growth of +5.6% at 2014, +4.4% at 2015 and +3.1% at 2016².

According to Experian, the increase in online shopping in the last decade has increased the share of special forms of trading (SFT) to over a tenth of total retail sales (estimated at 10.6% in mid-2014 against 4.7% in June 2008). Internet sales now dominate the picture of SFT. In 2014, the value of internet sales is estimated at £37.2bn at current prices. This retail study takes into account Experian's forecast of the proportion of expenditure which will be committed through special forms of trading (comprising Non-store Retail Trade (NSRT) such as internet sales, TV shopping etc.) over the reporting period to 2025. In order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 of its Retail Planner Briefing Note) which makes an allowance for internet sales which are sourced from stores. This is shown below in Table 3-3.

TABLE 3-3
Estimated and projected market share of Special Forms of Trading

Year	Convenience	Comparison
2015	2.8%	12.5%
2020	4.0%	15.7%
2025	4.9%	15.9%

Notes:

1. Appendix 3 of Retail Planner Briefing Note 12.1, October 2014

3.6 Convenience Goods Expenditure per Head

Tables 2.1 and 2.2 of Appendix B set out the expenditure per head of residents within the three main catchment areas. Table 2.1 sets out the total expenditure of residents on convenience goods each year, and Table 2.2 discounts Non-Store Retail Trade (NSRT). NSRT is principally expenditure through the internet but also through markets, catalogues, vending machines and door to door sales. This

² Experian Retail Planner Briefing Note 12.1 (Figure 1a) October 2014

³ Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009

percentage deduction for each year is taken from Experian's Retail Planning Briefing Note 12.1 published in October 2014⁴.

3.7 Total Available Convenience Expenditure

Using the above growth rates and NSRT allowances, it is possible to produce total available expenditure estimates for each catchment area at 2015, 2020 and 2025. Table 3 of Appendix B sets out the total amount of convenience expenditure available in each of the three catchment areas. This is achieved by multiplying the population of each of the zones (from Table 1) by residents' expenditure per head excluding NSRT (Table 2.2).

There is £763.74m available within Fife as a whole in 2015 and a growth in expenditure of £61.43m over the period 2015-2025.

3.8 Comparison Goods Expenditure per Head

Tables 2.1, 2.2, 2.3 and 2.4 of Appendix C set out the comparison expenditure per head of residents within the three main catchment areas. Expenditure per head on bulky goods has been shown separately as per the study brief requirement. Tables 2.2 and 2.4 discount Non-Store Retail Trade (NSRT) for all comparison goods and bulky goods only respectively and show the proportion of expenditure accounted for by NSRT means.

3.9 Total Available Comparison Expenditure

Using the growth rates and NSRT allowances Tables 3.1 and 3.2 of Appendix C set out the total available comparison and bulky goods expenditure in each of the three catchment areas. This is achieved by multiplying the population of each of the catchment areas (from Table 1) by residents' expenditure per head excluding NSRT (Tables 2.2 and 2.4).

For the period 2015-2025, there is significant growth in comparison goods expenditure potential of £395.47m and for bulky goods, a growth in total available expenditure of £104.11m. The strengthening comparison goods per capita growth rates identified by Experian have consequently injected an additional £76.36m of potential spend into the Fife economy compared last year's reporting for the 10 year period 2014-2024 in the 2014 FRCS.

3.10 Market Share of Expenditure

To assess the capacity for new retail floorspace, the market share and penetration rates are estimated for shopping facilities within the three catchment areas based on information gathered through the 2009 NEMS household survey. We have 'rolled forward' the current estimated market share in the three catchment areas for each category of goods up to 2025. This approach of rolling forward existing market share is in line with standard practice and does not take into account the need to 'claw back' leakage from expenditure directed to centres elsewhere, which might be achieved through improvements in retail provision or offer. We have considered separately the potential effects on residual expenditure capacity through a 'claw back' of leakage as part of sensitivity testing on both convenience and comparison goods.

It is recognised that where people choose to shop for convenience and comparison goods may well have changed since 2009 when the household survey was undertaken, as new retail floorspace has been developed. The attractiveness of competing centres such as Livingston, The Gyle, Edinburgh and Dundee will undoubtedly have continued to attract shoppers out of Fife, particularly for comparison and bulky goods purchases. We have therefore made best judgement local adjustments to the net flows of expenditure to reflect these changes. This was also the approach taken in the 2013 and 2014 FRCS. The true effects of shopper preferences to competing retail locations can only be ascertained by a fresh

⁴ In line with guidance from Experian, the deduction does not include goods that are ordered online but collected or delivered from physical stores and is therefore transacted through the tills of these stores. It does however include means such as Ocado or 'dark' stores and warehouses where access to the public is not available.

household telephone survey. Our assumptions on market share are shown in Table 5 of Appendix B for convenience goods and Tables 5.1 and 5.2 of Appendix C for comparison and bulky goods respectively.

3.11 Benchmark Turnovers and Turnover Efficiency

We have estimated the average turnover generated by existing retail facilities within the three catchment areas. In tandem with the 2014 FRCS, we have calculated the turnover of existing facilities using average sales densities rates from the Mintel Retail Rankings 2013, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2012 prices. It should be noted that the Retail Rankings estimates are a combined turnover ratio for both food and non-food sales and our approach is to apply these average turnover ratios as the convenience turnover ratio only based on estimates of the split of convenience/comparison floorspace in each foodstore. The majority of these assumptions are as per the 2014 FRCS, unless otherwise stated.

We have made no adjustments to the total turnover in each catchment area about the level of over or under trading of stores. The benchmark turnovers are not necessarily the actual turnovers of the foodstores in the catchment areas, but they do provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Survey derived 'actual' turnovers are sometimes used as a comparison to national average (benchmark) turnovers, but in the absence of a recent household telephone survey to help inform this, sales densities across the stores in the catchment areas could have changed significantly as people's shopping preferences alter over time dependent upon current retailing provision. We recognise however that some stores may well continue to trade successfully above or below their company average sales density. As such, the retail capacity forecasts for 2020 and 2025 should therefore be seen as estimated ceilings, rather than targets which must be achieved through new retail development.

In terms of turnover efficiency, Experian suggests that there could be a reduction in convenience goods efficiency in the medium term till 2022, then only a nominal 0.1% per annum growth is recommended for the period 2022 to 2035⁵. This reduction in turnover efficiency in the short term will cancel out any longer term growth over the forecast period in this study. Tables 4.1, 4.2 and 4.3 in Appendix B, apply the Experian recommendations for convenience retail sales density growth, with the resultant 2025 turnover for all three catchment areas of West Fife, Mid Fife and East Fife being marginally lower than the 2015 position.

Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Tables 4.1, 4.2 and 4.3 of Appendix C therefore assume that comparison floorspace in the three catchment areas will increase their benchmark turnover in real terms. Retail sales density growth rates of 3.8% in 2015; 2.3% in 2016, 2% in 2017-2021 and 2.2% from 2022 to 2025 per annum are adopted as recommended by Experian⁶.

3.12 Retail Commitments

Since the 2014 FRCS there have been retail planning permissions and store closures which have affected the projected capacity for new retail floorspace. We have taken into account the loss of the Tesco foodstores at Kirkcaldy and that planned at Leven (included as a Commitment in the 2014 FRCS) and included the recently consented M&S foodstore at Fife Central Retail Park in our consideration of Commitments. There are also retail commitments in the pipeline that also need to be taken into account. These proposals/changes include:

- In Cowdenbeath, the former Vico site has been sold to London & Scottish Investments and the proposal for a new 4,300 sq. m gross (2,573 sq.m net) supermarket remains live

⁵ Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a

⁶ Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b

- Aldi's proposals for a 542 sq. m gross extension to the existing Aldi at McKenzie Street, Kirkcaldy
- The Kingslaw Village and Burnside neighbourhood proposals which include a 1,500 sq. m gross supermarket
- A 2,323 sq. m gross supermarket at the South Fife Neighbourhood Centre, Dunfermline
- A 1,275 sq. m gross (837 sq. m net) Marks & Spencer Simply Food at Fife Central Retail Park, Kirkcaldy
- In Glenrothes, the 7,432 sq. m (gross) Class 1 retail proposals for the Queensgate and the 3,085 sq. m extension proposals for the Saltire Retail Park

The retail capacity analysis in this report takes these developments and commitments into account, and the retail floorspace projections are over and above these schemes.

Table 6 of Appendix B sets out the estimated turnover of convenience goods commitments over the study period. These have a total convenience goods turnover in 2015 of £91.16m.

Similarly, Table 6.1 of Appendix C sets out the estimated turnover of comparison goods commitments over the study period. These have a total comparison goods turnover in 2015 of £34.60m. We have also made judgements as to a likely level of bulky goods floorspace within the comparison commitments. This is shown in Table 6.2 in Appendix C.

In discussion with Fife Council, we have not included a number of planning convenience and comparison retail consents as commitments due to the uncertainty of some proposals progressing. These applications and consents are shown in Table 7 of both Appendix B and C and are not treated as deductions from capacity.

3.13 Sensitivity Testing

We have assessed the following scenarios for sensitivity testing of the retail capacity forecasts:

Scenario 1 – the 'baseline' scenario, in which we assume that the 2015 pattern of market shares of convenience and comparison goods shopping in the three catchments of West Fife, Mid Fife and East Fife (as indicated by the 2009 NEMS household survey – as locally adjusted) remains unchanged throughout the forecasting period to 2025. The implicit assumption in this scenario is that any new retail development in these shopping catchments does not change the market shares of expenditure attracted from the catchment area. We have included the potential turnover of planning commitments for both convenience and comparison proposals as part of our testing under our baseline scenario.

Scenario 2 – we assume new retail development in the three catchment areas has the potential to alter the balance of market shares by 'clawing back' some of the leaked expenditure (estimated through the NEMS household survey) from 2015 onwards. For convenience goods, we have modelled a theoretical 'clawback' of some 25% and 50% of the leakage and assessed the effect on the residual expenditure capacity. The 2013 FRCS assessed a clawback of leakage/attraction of new trade of 50% (high estimate tables). Any expenditure capacity has been converted into a quantum of net floorspace that could theoretically be supported. We have assessed levels of floorspace for both mainstream and discounter foodstores.

For comparison goods, we have modelled a 'clawback' of some 10% and 20% of leakage from West Fife and Mid Fife. For East Fife, we have assessed clawback at the lower levels of 5% and 10% given the existing nature of the comparison goods offer in the catchment area. Again, any expenditure capacity has been converted into a quantum of net floorspace that could theoretically be supported in each catchment area. We have assessed levels of floorspace for both town centre comparison goods retail provision and bulky goods provision.

Quantitative Capacity for Convenience Retail Floorspace

In this section we set out our retail convenience capacity forecasts for Fife's three catchment areas at the 2015 'baseline' year and throughout the forecasting period (i.e. 2020 and 2025).

The results of the capacity analysis are contained in the tables in Appendix B and the accompanying analysis below.

4.1 Scenario 1 – Baseline

Tables 8.1 to 8.3 in Appendix B set out the capacity for additional convenience goods floorspace in the three catchment areas of West Fife, Mid Fife and East Fife. This on the basis of the 'baseline' scenario, in which we assume that the 2015 pattern of market shares of convenience goods shopping in the catchment areas remain unchanged throughout the forecasting period to 2025.

Table 4-1 below is a summary of our baseline position setting out the convenience goods capacity identified within the three catchment areas and how this changes between 2015 and 2025.

TABLE 4-1
Summary of Expenditure Capacity for Convenience Goods Floorspace (£m)

Catchment Area	2015	2020	2025
West Fife	-£68.31	-£53.34	-£42.01
Mid Fife	-£11.56	£6.09	£20.00
East Fife	-£8.66	-£2.86	£1.72

Notes:

1. From Tables 8.1, 8.2 and 8.3 in Appendix B

The table shows that there is no requirement for additional convenience goods floorspace across the study period in West Fife. The catchment area is served by large foodstores including the new 6,515 sq. m gross Tesco at Carnegie Drive, Dunfermline, as well as a range of smaller convenience facilities which provide for more localised top up provision. There are also a number of outstanding commitments for new convenience goods floorspace, amounting to a sizeable £58.46m of turnover which have not yet been built out (as per Table 6, Appendix B). In East Fife, there is only a limited capacity of £1.72m by 2025. In Mid Fife, the capacity position has altered more significantly than the two other catchment areas since the 2014 FRCS. This is primarily due to the knock on effects of losing Tesco from Kirkcaldy and Leven (as an existing store and a commitment respectively) with the resultant loss of almost £50m of turnover. As such, in 2020 there is a capacity of £6.09m to support additional convenience goods floorspace, rising to £20m in 2025.

Residual expenditure capacity is converted to floorspace equivalent figures on two bases. The first is based on the likely floorspace requirements of the 'Top Four' foodstore operators (Tesco, Asda, Morrisons and Sainsburys) with an average turnover ratio of £11,572 per sq. m net (in 2015 at 2012 prices). The second is based on the requirements of 'Discounter' operators (Aldi, LIDL, Iceland and Farmfoods) with an average turnover ratio of £6,090 sq. m net (in 2015 at 2012 prices).

For Mid Fife in 2020, the residual expenditure capacity of £6.09m therefore converts into a net floorspace equivalent of 346 sq. m net for a 'top four' foodstore retailer or 759 sq. m net for a 'discounter' foodstore. By 2020, these rise to 1,135 sq. m net for a 'top four' foodstore retailer or 2,488 sq. m net for a 'discounter' foodstore. Should any of the convenience goods commitments not come forward, or the approved schemes be amended to reduce the scale of the proposals, further capacity would of course be released.

4.2 Scenario 2 – Clawback of Leakage to 2025

Tables 9.1, 9.2 and 9.3 of Appendix B make an allowance for the ‘clawback’ of leakage in our Scenario 2 sensitivity tests. As noted in the previous section, for convenience goods, we have modelled a ‘clawback’ of some 25% and 50% of the leaked expenditure (derived from the NEMS 2009 Household Survey) from each of the three catchments and assessed the effect on the residual expenditure capacity.

Table 4-2 shows the potential for new convenience goods floorspace in each catchment with 25% clawback and Table 4-3 illustrates a 50% clawback of expenditure leakage.

As for Table 4-1, we have only shown quantum’s of potential net floorspace where there is a positive residual expenditure capacity.

It is important to note that the capacity forecasts are cumulative, i.e. the forecasts of potential new floorspace for each date include the forecasts for the previous dates and are not additional to the earlier forecasts.

TABLE 4-2

Potential Capacity for New Convenience Goods Floorspace (sq. m net) with 25% Clawback

Catchment Area	At 2015		At 2020		At 2025	
	‘Top 4’ Equivalent	‘Discounter’ Equivalent	‘Top 4’ Equivalent	‘Discounter’ Equivalent	‘Top 4’ Equivalent	‘Discounter’ Equivalent
West Fife	0	0	0	0	0	0
Mid Fife	0	0	1,247	2,370	2,487	4,726
East Fife	0	0	649	1,232	1,083	2,057

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix B
2. Net floorspace quantum’s are only shown where there is a positive residual expenditure capacity

TABLE 4-3:

Potential Capacity for New Convenience Goods Floorspace (sq. m net) with 50% Clawback

Catchment Area	At 2015		At 2020		At 2025	
	‘Top 4’ Equivalent	‘Discounter’ Equivalent	‘Top 4’ Equivalent	‘Discounter’ Equivalent	‘Top 4’ Equivalent	‘Discounter’ Equivalent
West Fife	0	0	0	0	0	0
Mid Fife	361	687	1,962	3,728	3,229	6,136
East Fife	964	1,831	1,547	2,940	2,015	3,829

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix B
2. Net floorspace quantum’s are only shown where there is a positive residual expenditure capacity

In West Fife, having allowed for implementation of commitments and either a 25% or 50% level of clawback of expenditure leakage, there is no additional floorspace capacity for the forecast period to 2024. This position remains unaltered from both the 2013 and 2014 FRCS conclusions.

In Mid Fife, with a 25% clawback there is a nominal convenience floorspace capacity in 2020 rising more significantly with a theoretical 50% clawback. The high level of outstanding commitments in Mid Fife (with total turnovers of £25.06m) coupled with pending applications for new convenience floorspace (CISWO, North Street, Glenrothes at £6.78m and revised proposals for a potential Class 1 foodstore at Queensgate, Glenrothes at £11.51m) are such that should all these developments come to fruition, they may significantly alter the shopping habits of Mid Fife residents and assist in retention of leaked expenditure out of the catchment area. At 50% clawback, this equates to a net convenience goods floorspace of between 1,962 sq. m and 3,728 sq. m at 2020, increasing to 3,229 sq. m and 6,136 sq. m at 2024.

Whilst there are a number of ways in which such identified needs can be met, food superstores usually provide upwards of 2,000 sq. m of convenience goods floorspace. This identified need could therefore potentially support up to two discounter foodstores or an extension to a main superstore by 2025. Aldi already has significant representation across all the main towns in Fife, but the supermarket's £600m UK expansion plan to open 130 new stores⁷ will continue to increase pressure on the main four operators (i.e. Asda, Morrisons, Sainsbury's and Tesco).

Similarly, Lidl has increased its share of the UK grocery market to 3.5% and expects sales to surpass £4 billion in the current financial year. Over the next three years, the discount supermarket plans to invest £1.5bn in its UK estate. While other UK grocery retailers have slowed down their store opening plans, Lidl is preparing to ramp up its new openings to 40-50 per year - almost one a week - as it aims to 'ensure that everyone across the country one day has a Lidl store near them'. As a key part of this investment, Lidl plans to refurbish up to 150 existing stores into stores of the future, at a cost of over £2m each.⁸ Smaller district and local town centres such as Lochgelly, Burntisland, Levenmouth and Methil may become attractive to such operators and potentially offer redevelopment opportunities where the adopted development plan supports town centre regeneration to help improve their vitality and viability.

In East Fife, with a 25% clawback, there is only marginal additional convenience capacity up until 2025, akin to supporting a main foodstore remodelling/extension or a discount foodstore. With a theoretical 50% clawback, the capacity equates to a net convenience goods floorspace of between 1,547 sq. m and 2,940 sq. m at 2020, increasing to 2,015 sq. m and 3,829 sq. m at 2025. The 2009 NEMS Household Survey identified significant convenience expenditure leakage from the Cupar/St Andrews zone (Zone D) in the order of 74% (73% of which goes to Dundee) and in the western edge of the catchment in Cupar/Glenrothes (Zone E) leakage of 45%, virtually all of which goes to Perth and Kinross. There may therefore be opportunities to help stem this outflow of expenditure through providing an improved convenience retail offer in these zones of East Fife (taking into account the existing committed developments as per Table 6, Appendix B).

As previously stated we have modelled our capacity analysis on benchmark (average) turnover ratios for existing convenience floorspace in the catchment area. We have not allowed for trade diversion or modelled for acceptable levels of retail impact on the existing provision, which would have the effect of releasing potential expenditure to support new floorspace. It is nonetheless likely that some of the larger foodstores in the main towns of Dunfermline, Kirkcaldy and Glenrothes could sustain a level of retail impact without threatening their overall viability. This would need to be tested in retail impact assessments for new convenience floorspace as planning applications come forward over the plan period.

For all the above capacity scenarios, as required by SPP and development plan policy, the sequential approach to site selection should be adopted. Proposals for new convenience floorspace should also be well located in relation to the communities they are intended to serve, should be accessible by public transport and should minimise the need for travel between settlements.

The 'need' for new floorspace has two principal indicators, the level of quantitative need identified and qualitative factors that may justify the provision of floorspace over and above the level of quantitative need. This retail study does not include a qualitative assessment of the town centres within each catchment area and accordingly, the quantitative assessment is just one element in considering the need for additional convenience provision. Any deficiencies in provision highlighted above are an important consideration to assure that new provision within the catchments promotes an equitable and more balanced convenience goods sector.

⁷ Retail Week, 6 August 2015, 'Aldi targets 35,000 new staff in ambitious £600m expansion plan'

⁸ IGD Retail Analysis, 12 November 2015 'Lidl UK: Setting itself apart with 'Lidl of the Future' concept'

Quantitative Capacity for Comparison Retail Floorspace

In this section we set out our retail comparison capacity forecasts for Fife’s three catchment areas at the 2015 ‘baseline’ year and throughout the forecasting period (i.e. 2020 and 2025).

The results of the capacity analysis are contained in the tables in Appendix C and the accompanying analysis below.

5.1 Scenario 1 - Baseline

Tables 8.1 to 8.6 in Appendix C set out the capacity for additional comparison goods and bulky goods floorspace in the three catchment areas of West Fife, Mid Fife and East Fife. This on the basis of the ‘baseline’ scenario, in which we assume that the 2015 pattern of market shares of comparison goods shopping in the catchment areas remains unchanged throughout the forecasting period to 2025.

Table 5-1 below is a summary of our baseline position setting out the comparison goods capacity identified within the three catchment areas and how this changes between 2015 and 2025.

TABLE 5-1:

Clawback Summary of Expenditure Capacity for Comparison Goods Floorspace (£m)

Catchment Area	At 2015		At 2020		At 2025	
	All comparison goods	Bulky goods	All comparison goods	Bulky goods	All comparison goods	Bulky goods
West Fife	£34.50	£55.61	£50.32	£66.41	£84.11	£82.98
Mid Fife	-£32.74	£47.07	-£19.64	£58.31	£16.84	£76.51
East Fife	£10.81	£7.75	£15.35	£9.04	£25.16	£10.93

*From Tables 8.1, 8.2, 8.3, 8.4, 8.5 and 8.6 in Appendix C

As with the convenience capacity tables, the comparison capacity forecasts are cumulative, i.e. the forecasts of potential new floorspace for each date include the forecasts for the previous dates and are not additional to the earlier forecasts. Equally, the bulky goods forecasts are a component of the comparison goods figures and not in addition to the all comparison goods capacity forecast.

The forecast increases in comparison goods expenditure allow for year on year increases in the sales densities of existing floorspace, in line with the recommendations of Experian⁹. This allows a substantial proportion of the £395.47m growth in expenditure over 2015 to 2025 (Table 3.1 in Appendix C) to support the existing shops and stores and allocates 44% of it to existing shops and just over 55% to new floorspace. It also includes an allowance for the turnover of comparison goods commitments of approximately £6.30m for West Fife, £23.74m for Mid Fife and £4.56m for East Fife in 2015. With the exception of the Saltire Retail Park extension and the Tullis Russell development in Glenrothes, the commitments are the same as for convenience goods, being the comparison goods elements of the same developments.

Tables 8.1 to 8.3 (Appendix C) show any residual expenditure capacity converted to floorspace equivalent figures on the basis of a town centre average sales density for each catchment. We have adopted the equivalent sales densities¹⁰ as utilised in both 2013 and 2014 FRCS, as we consider these to reflect the nature and range of comparison goods offer in the catchments’ main towns. For West Fife and Mid Fife, we have used a comparison goods turnover ratio of £4,879 per sq. m and for East Fife, a

⁹ Experian Retail Planner Briefing Note 12.1 Addendum, October 2014 Table 4b

¹⁰ Turnover ratios in 2013 and 2014 FRCS projected using Experian Retail Planner Briefing Note 12.1 Addendum, October 2014 Table 4b

figure of £3,633 per sq. m. An average of retail warehouse turnovers of £2,076 per sq. m is used as a benchmark figure to calculate potential capacity for additional bulky goods floorspace.

In West Fife, there is comparison goods capacity within the catchment area which grows substantially over the study period to 2025, this is having allowed for the growth in internet trading. By 2025 there is a notional residual surplus of some £84.11m to support 17,897 sq. m net of new comparison floorspace in town centres. This compares to a figure of £67.91m and 14,448 sq. m (in 2024) identified in the 2014 FRCS. Comparison shopping in West Fife is dominated by Dunfermline, which retains 81% of comparison goods expenditure in Zone 7 (Dunfermline – 2)¹¹.

In Mid Fife, there is residual expenditure of £16.84m to support additional comparison floorspace in 2025. Comparatively, the 2014 FRCS showed no capacity at all in Mid Fife across the 10 year study period. Our figures for Mid Fife differ due to Experian's more confident forecast growth rates in comparison expenditure per head (referred to in Section 3 of this report), giving Mid Fife a total available comparison goods expenditure of £656.39m in 2025 compared to the 2014 FRCS figure of £590.13m in 2024.

The Mid Fife comparison goods catchment is relatively well self-contained, with Kirkcaldy and Glenrothes dominating the retail provision. There has also been additional comparison goods development with a B&M Homestore in Glenrothes and a doubling in size of the Next retail unit at the Fife Central Retail Park; both these developments adding £11.82m to the 2025 turnover position and strengthening the retail offer in this catchment. Kirkcaldy has the widest draw for comparison goods shopping, retaining 89% of shoppers from its immediate Zone B (Kirkcaldy/Glenrothes) and 85% of shoppers from Zone A (Kirkcaldy)¹³. Outside of Fife, Edinburgh is the second most popular destination for comparison goods shopping (Dundee is the first) and attracts shoppers from most areas of Fife.

In East Fife, there is residual expenditure surplus to support small new town centre floorspace ranging from 2,975 sq. m in 2015 to 5,621 sq. m net in 2025. These notional levels of floorspace would allow for some small scale redevelopment and/or shop refurbishments in East Fife's main town centres. The NEMS 2009 survey showed that there is substantial leakage in East Fife amounting to some 80% for comparison goods and 85% for bulky goods. The northern most Zone D (Cupar/St Andrews) retains only 12% of comparison expenditure. Unsurprisingly Dundee is the major attraction and in the west of the catchment, shoppers are also drawn to Perth, with Zone E (Cupar/Glenrothes) retaining 34% of comparison expenditure¹³.

For bulky goods, Table 5-1 (and Tables 8.4, 8.5 and 8.6 of Appendix C) shows that there is notional bulky goods expenditure capacity within West and Mid Fife which grows substantially over the study period to 2025. Given the high residual capacity it is prudent to also consider the actual growth in bulky goods expenditure which has taken place during this period as the estimated sales densities for bulky goods floorspace could vary considerably from our estimations. This is shown in the Table 5-2 and would impact upon the available expenditure to support new floorspace.

TABLE: 5-2
Bulky Goods Residual Expenditure Capacity Growth (£m)

Catchment Area	2015- 2020	2020-2025
West Fife	10.80	16.57
Mid Fife	11.24	18.20
East Fife	1.29	1.89

Notes:

1. From Tables 8.4, 8.5 and 8.6 in Appendix C

¹¹ NEMS Household Survey, October 2009

5.2 Scenario 2 – Clawback of Leakage to 2025

Tables 9.1 to 9.6 of Appendix C make an allowance for the ‘clawback’ of leakage in our Scenario 2 sensitivity tests. As noted in Section 3.13, for convenience goods, we have modelled a ‘clawback’ of some 10% and 20% of the leaked expenditure (derived from the NEMS 2009 Household Survey) from West and Mid Fife and slightly lower levels of clawback of 5% and 10% in East Fife and assessed the effect on the residual expenditure capacity.

Table 5-3 shows the potential for new comparison goods floorspace in each catchment with 10% clawback for West and Mid Fife and 5% clawback for East Fife.

TABLE 5-3

Potential Capacity for New Comparison Goods Floorspace (sq. m. net) with up to 10% Clawback

Catchment Area	At 2015		At 2020		At 2025	
	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent
West Fife	8,898	27,603	11,210	29,749	16,027	33,373
Mid Fife	0	16,259	0	18,612	4,986	22,583
East Fife	2,934	3,896	3,585	4,102	4,983	4,455

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix C
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity
3. 10% clawback for West Fife and Mid Fife and a 5% clawback for East Fife

Table 5-4 illustrates a 20% clawback of expenditure leakage in West and Mid Fife and a 10% clawback in East Fife.

TABLE 5-4

Potential Capacity for New Comparison Goods Floorspace (sq. m. net) with up to 20% Clawback

Catchment Area	At 2015		At 2020		At 2025	
	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent
West Fife	10,725	28,420	13,104	30,610	18,062	34,308
Mid Fife	0	17,084	439	19,481	7,171	23,526
East Fife	3,652	4,057	4,328	4,272	5,780	4,640

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix C
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity
3. 20% clawback for West Fife and Mid Fife and a 10% clawback for East Fife

The tables show that assuming levels of clawback of up to 20% across the three catchments there is forecast comparison goods capacity, which grows substantially over the study period to 2025 to support new comparison floorspace. This capacity forecast for Fife's town centres results from forecast growth in population and expenditure per head over the period 2015 to 2025.

In West Fife in particular, taking into account existing commitments, there is substantial expenditure growth to support a major retail town centre proposal, in line with the town centres first policy approach identified in the Proposed FIFEplan.

In Mid Fife, there is also capacity at 2025, albeit for a lesser quantum of floorspace but for example, it may be sufficient to support a small scale redevelopment of the core town centre shopping facilities in

say The Mercat Centre in Kirkcaldy or The Kingdom Centre in Glenrothes. Mid Fife in particular has experienced significant job losses following the recent closure of the Tesco supermarket in Kirkcaldy (along with job losses in other employment sectors) and a strategic approach to new town centre retail investment may be required, with town centre regeneration projects perhaps benefiting from Fife Council's £3 million capital allocation from the Town and Local Centres Regeneration Fund¹².

Given the considerable outflow of comparison goods expenditure from East Fife to Dundee (80%), we do not recommend any significant proportion of comparison goods floorspace is directed to the East Fife catchment area due to its disproportionate and tourism related comparison goods offer.

With one fifth of Fife's workforce commuting to Edinburgh and Dundee¹³ the identified capacity for new comparison floorspace across the three catchment areas should be carefully balanced with the economic implications of additional retail floorspace across Fife. Unlike its larger, more densely populated, neighbouring authorities of Dundee and Edinburgh, Fife lacks the same range and scale of retail facilities. This makes the region and its existing town centres, particularly sensitive to the insertion of new retail floorspace; with any significant quantum of retail floorspace requiring both a qualitative and quantitative retail assessment.

In general, whilst we have identified theoretical capacity for between 2,975 sq. m and 17,897 sq. m net of comparison goods capacity across Fife at 2025 (based on a constant market share basis), we would urge caution in planning for such a large quantum of comparison goods floorspace. Residual capacity beyond 2020 should be viewed with caution as there is little certainty over long term economic performance and prosperity.

¹² Kirkcaldy 4 All, Business Plan 2015

¹³ University of Glasgow, Fife Workforce Modelling Study, March 2014

Conclusions

Fife Council commissioned CH2M Hill and Maria Francké Planning to prepare an update to the 2014 Fife Retail Capacity Study. The study is required to assess the current convenience and comparison retail offer and to quantify the need for new floorspace. This report is more limited in scope and unlike the 2014 FRCS, there is no review of the retail market in Fife. This study is written to inform policy development and the assessment of retail applications across Fife. It is informed by a household telephone survey of 2,190 residents in a survey area covering Fife (undertaken by NEMS in 2009). The empirical research is supplemented by desk-based research and analysis carried out by CH2M Hill and Maria Francké Planning.

As set out in the report, the retail capacity model assumes that the market share and role of Fife's three catchment areas and its main town centres will remain unchanged in the future. Whilst this study is a quantitative capacity report and does not address the vitality and viability of town centres, it will be important in considering proposals for new retail development to make reference to benefits derived from qualitative improvements in retail provision. If a proposal for retail development comes forward and that proposal exceeds the capacity projections set out in our tables in Appendix B and C, this does not necessarily mean the proposal should be refused planning permission. Retail capacity is an important consideration in the context of retail trade diversion and retail impact, but it is also important to place this in context with whether a proposed development is consistent with the role, character and catchment area of the town or area it is intended to serve. It is important that such a qualitative consideration sits alongside a consideration of whether a proposal is justified in terms of SPP's sequential approach and recommended impact tests.

Equally, where our quantitative convenience and comparison capacity findings demonstrate an excess of residual expenditure, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals
- Expected changes in shopping patterns
- The future efficiency of retail floorspace

In terms of convenience expenditure capacity, our assessment demonstrates that there is no requirement for additional convenience goods floorspace across the study period in West Fife and only nominal capacity in East Fife by 2025. The catchment areas are served by large foodstores as well as a range of smaller convenience facilities which provide for more localised top up provision. In West Fife in particular, there are also a number of outstanding commitments for new convenience goods floorspace which have not yet been built out. Only in Mid Fife at 2020, is there a notional £6.09m to support additional convenience goods floorspace. This rises to £20m in 2025 and could support up to 2,488 sq. m of new retail floorspace.

With the slow upsurge in the economy, Experian's forecast per capita growth rates for comparison goods are stronger than last years. This feeds through into the capacity calculations and we have identified a theoretical capacity for up to 2,975 sq. m of comparison goods floorspace in East Fife and up to 17,897 sq. m net of new floorspace in West Fife at 2025 (based on a constant market share basis). These capacity figures at 2025 should however be viewed with caution as despite the strengthening economy, there is little certainty over long term economic performance and prosperity. In line with the town centres first policy approach in the proposed FIFEplan, the capacity in West Fife would allow for the development of more modern retail units within the catchment's main town centres. This would help meet the requirements of retailers which would be expected to be present in towns of their size but which are not currently represented.

In Mid Fife, there is comparison expenditure capacity at 2025 which would be able to support up to 3,583 sq. m of town centre floorspace. This may be sufficient to support a small scale redevelopment of the core town centre shopping facilities in say The Mercat Centre in Kirkcaldy or The Kingdom Centre in Glenrothes.

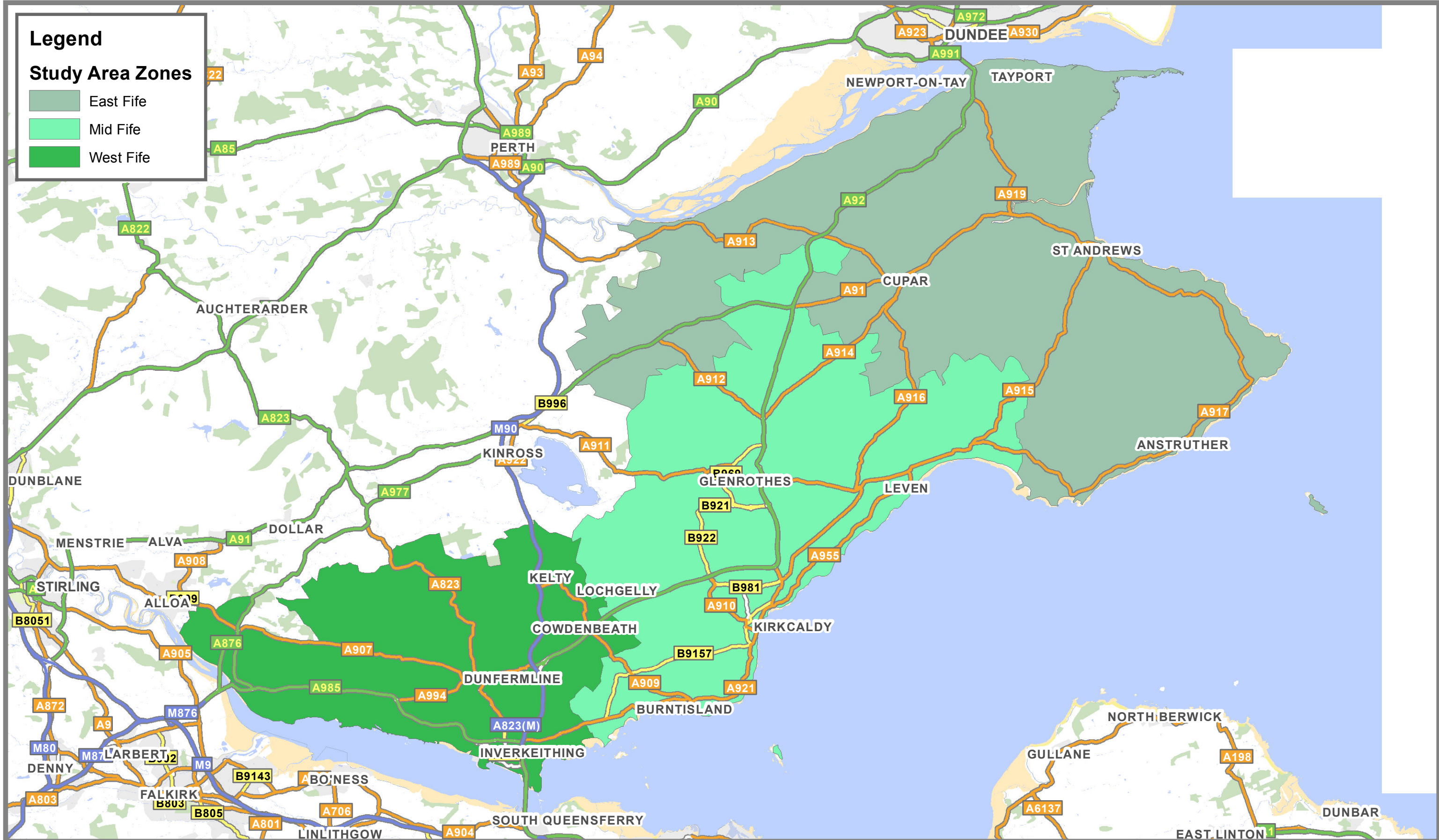
In East Fife, there is also expenditure capacity across the study period, albeit for a lesser quantum of floorspace (2,975 sq. m in 2015; 3,815 sq. m in 2020 and 5,621 sq. m in 2025). These notional levels of floorspace would allow for some small scale redevelopment and/or shop refurbishments in East Fife's main town centres.

Appendix A
Study Area Catchment Plan

Legend

Study Area Zones

- East Fife
- Mid Fife
- West Fife



Appendix B
Convenience Goods Capacity Assessment

Table 1: Catchment Area Population Projections

Catchment Area	2015	2020	2025	Growth 2015-25
West Fife	126,571	129,483	132,136	5,565
Mid Fife	178,270	182,220	185,713	7,443
East Fife	67,852	69,279	70,583	2,731
Total Fife	372,693	380,982	388,432	15,739

- Notes:**
1. Population data from 'Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife, based on post 2011 Census data
 2. The population of 'Clackmannan' from postcode sector FK10 4 has been excluded from West Fife

Table 2.1: Convenience Goods Expenditure Per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	2,152	2,141	2,152	2,161	2,174	2,187	2,200	2,213	2,226	2,240	2,253	2,266	2,280
Mid Fife	2,060	2,049	2,060	2,068	2,080	2,093	2,105	2,118	2,131	2,143	2,156	2,169	2,182
East Fife	2,155	2,144	2,155	2,164	2,177	2,190	2,203	2,216	2,229	2,243	2,256	2,270	2,283

- Notes:**
1. 2012 Prices
 2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
 3. Expenditure per head projected using Experian Forecast convenience goods expenditure per head growth rates from Experian Retail Planner Briefing Note 12.1 (October 2014) Figure 1a (2014: -0.5, 2015: 0.5, 2016: 0.4, 2017-25: 0.6 (annual average over 14 years 2022-35))

Table 2.2: Convenience Goods Expenditure Per Head (£) with NSRT Deduction

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	2,103	2,086	2,092	2,094	2,102	2,108	2,116	2,124	2,128	2,137	2,147	2,158	2,168
Mid Fife	2,012	1,996	2,002	2,004	2,012	2,017	2,025	2,033	2,037	2,045	2,055	2,065	2,075
East Fife	2,105	2,088	2,095	2,096	2,105	2,111	2,119	2,127	2,131	2,139	2,150	2,161	2,171
Proportion of Expenditure Accounted for by NSRT Means (%)	2.3	2.6	2.8	3.1	3.3	3.6	3.8	4.0	4.4	4.6	4.7	4.8	4.9

- Notes:**
1. 2012 prices
 2. Base convenience goods expenditure per head for 2015-2025 taken from Table 2.1
 3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
 4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 12.1, October 2014
 5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 70% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 12.1, October 2014

Table 3: Total Available Convenience Expenditure (£m)

Catchment Area	Growth in Convenience Goods Expenditure			
	2015	2020	2025	2015 - 2025
West Fife	264.75	275.07	286.52	21.77
Mid Fife	356.87	370.47	385.39	28.52
East Fife	142.12	147.38	153.26	11.14
Total Fife	763.74	792.92	825.17	61.43

Notes:

1. 2012 prices
2. Total available convenience goods expenditure for catchment areas calculated by multiplying Table 1 (Population) by Table 2.2 (Expenditure per head minus NSRT deduction)

Table 4.1: West Fife Convenience Floorspace and Turnover

	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2015 Turnover £m	2016 Turnover £m	2017 Turnover £m	2018 Turnover £m	2019 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net								
Dunfermline Town Centre										
Marks & Spencer (ground floor 2,120 sq. m gross and 30% gross conv)	636	413	10,522	4.34	4.32	4.31	4.30	4.29	4.28	4.29
Rest of Town Centre, including small Co-op	2,810	1,827	5,930	10.80	10.76	10.73	10.71	10.69	10.67	10.69
Sub Total	3,446	2,240		15.14	15.08	15.05	15.02	14.99	14.96	14.99
ASDA Halbeath (total 9,540 + 1,162 mez sq m gross, est 55% conv)	5,886	3,532	12,394	43.64	43.47	43.38	43.29	43.21	43.12	43.20
ASDA St Leonards (total 4,749 sq. m, 75% conv)	3,562	2,137	12,394	26.41	26.30	26.25	26.20	26.14	26.09	26.14
Tesco Duloch (total 6,147 sq m, 82% conv, + ext 2,747 at 22% conv)	5,645	3,387	10,496	35.44	35.30	35.23	35.16	35.09	35.02	35.09
Tesco Carnegie Drive (6,515sq.m gross, 70% conv)	4,561	3,192	10,496	33.41	33.27	33.21	33.14	33.07	33.01	33.07
Aldi Duloch (1,606 sqm gross, 80% conv)	1,285	899	6,771	6.07	6.05	6.03	6.02	6.01	6.00	6.01
Dobbies Garden Centre - Farm food hall (estimate 90% net)	350	315	8,000	2.51	2.50	2.50	2.49	2.49	2.48	2.49
Tesco Express, Aberdour Road	326	261	16,393	4.26	4.25	4.24	4.23	4.22	4.21	4.22
Aldi Halbeath Road (1,197 sq. m gross + 223 sq. m gross ext)	1,420	937	6,771	6.33	6.30	6.29	6.27	6.26	6.25	6.26
Iceland, Halbeath Road (est 80% conv)	641	513	7,304	3.73	3.72	3.71	3.70	3.70	3.69	3.70
Farmfoods, Carnegie Retail Park	750	525	6,200	3.25	3.23	3.23	3.22	3.21	3.21	3.21
Other Dunfermline shops	4,298	2,794	2,913	8.11	8.08	8.06	8.05	8.03	8.02	8.03
Co-op (former David Sands), Linburn Road, Dunfermline	319	191	6,600	1.26	1.25	1.25	1.25	1.25	1.24	1.25
Rosyth	1,888	1,227	2,965	3.63	3.61	3.61	3.60	3.59	3.58	3.59
Tesco, Rosyth	1,609	965	10,496	10.10	10.06	10.04	10.02	10.00	9.98	10.00
Sainsburys Local & Retail Units, Camdean, Rosyth	1,300	780	11,607	9.03	8.99	8.97	8.95	8.94	8.92	8.94
Inverkeithing	1,070	696	2,965	2.06	2.05	2.04	2.04	2.04	2.03	2.04
Crossgates	566	368	2,965	1.09	1.08	1.08	1.08	1.08	1.07	1.08
Kincardine	1,150	748	2,965	2.21	2.20	2.20	2.19	2.19	2.18	2.19
Tesco Metro, Dalgety Bay	1,840	1,288	10,496	13.48	13.42	13.40	13.37	13.34	13.32	13.34
Rest of Dalgety Bay	160	104	2,965	0.31	0.31	0.31	0.30	0.30	0.30	0.30
ASDA Dalgety Bay (3,437 sq. m gross 80% conv)	2,750	1,650	12,394	20.39	20.30	20.26	20.22	20.18	20.14	20.18
Aldi, Donnibrisle, Dalgety Bay (1,125sq.m net, 74% conv.)	1,574	833	6,771	5.62	5.60	5.59	5.58	5.56	5.55	5.56
Oakley, Saline, Torryburn, H Valleyfield, Crossford, Comrie, Cairneyhill, Charleston plus few others	2,454	1,595	2,965	4.72	4.70	4.69	4.68	4.67	4.66	4.67
Sub Total	45,403	28,936		247.04	246.05	245.56	245.07	244.58	244.09	244.57
Cowdenbeath Town Centre										
Morrisons	2,110	1,055	12,635	13.29	13.24	13.21	13.18	13.16	13.13	13.16
Rest of Town Centre	2,470	1,606	3,558	5.70	5.67	5.66	5.65	5.64	5.63	5.64
Aldi, Stenhouse Street (1,587 sq. m gross, 75% conv)	1,190	833	6,771	5.62	5.60	5.59	5.58	5.57	5.56	5.57
Sub Total	4,580	2,661		24.6	24.5	24.5	24.4	24.4	24.3	24.4
Kelty	550	358	2,965	1.06	1.05	1.05	1.05	1.05	1.04	1.05
Total West Fife	53,979	34,194		287.84	286.69	286.11	285.54	284.97	284.40	284.97

Notes:

1. 2012 prices
2. Gross floorspace for town centre shops based on Goad 2015 data
3. Dunfermline Town Centre floorspace based on gross:net ratio 35:65
4. Other gross floorspace provided by Fife Council based on their 2007 floorspace survey or planning applications
5. Aldi Halbeath Road floorspace data based on planning application
6. Trading level for other shops in Dunfermline, Rosyth, Inverkeithing, Crossgates, Kincardine, Dalgety Bay and Kelty estimated to be at 50% of Dunfermline Town Centre turnover ratio
7. Trading level for Cowdenbeath Town Centre estimated at 60% of Dunfermline Town Centre turnover ratio
8. Iceland, Halbeath Road floorspace based on retail agent's data
9. Supermarket turnover ratios based on Retail Rankings 2013, adjusted to remove non-retail sales and add VAT
10. Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2014 Retail Study figures
11. Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)

Table 4.2: Mid Fife Convenience Floorspace and Turnover

Mid Fife Catchment Area	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2015	2016	2017	2018	2019	2020	2025
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Kirkcaldy Town Centre										
Lidl (1,380 gross, 85% gross conv)	1,173	880	4,159	3.65	3.63	3.63	3.62	3.61	3.60	3.61
Marks & Spencer (2,830 sq. m gross, 30% gross conv)	849	552	10,522	5.79	5.77	5.75	5.74	5.73	5.72	5.73
Rest of Town Centre	3,460	2,249	5,930	13.30	13.24	13.22	13.19	13.16	13.14	13.16
Sub Total	5,482	3,681		22.73	22.64	22.60	22.55	22.51	22.46	22.51
Morrisons, Inveriel	5,095	2,815	12,635	35.46	35.32	35.25	35.18	35.11	35.04	35.11
ASDA, Kirkcaldy	7,133	3,846	12,394	47.52	47.33	47.24	47.15	47.05	46.96	47.05
Sainsburys, Kirkcaldy (5,819 sq.m gross, 85% conv)	4,946	2,968	10,904	32.27	32.14	32.07	32.01	31.94	31.88	31.94
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross, 80% conv)	1,194	896	6,771	6.05	6.02	6.01	6.00	5.99	5.98	5.99
Aldi, Ferrard Road, Kirkcaldy (1,606 sq.m gross, est 80% conv)	1,285	899	6,771	6.07	6.05	6.03	6.02	6.01	6.00	6.01
Other Kirkcaldy shops	6,170	4,011	2,965	11.86	11.81	11.78	11.76	11.74	11.71	11.74
Dysart	309	201	2,965	0.59	0.59	0.59	0.59	0.59	0.59	0.59
Coaltown of Wemyss	37	24	2,965	0.07	0.07	0.07	0.07	0.07	0.07	0.07
Ballingry	1,054	685	2,965	2.03	2.02	2.01	2.01	2.01	2.00	2.01
Lochgelly	1,350	878	2,965	2.59	2.58	2.58	2.57	2.57	2.56	2.57
Lochore	667	434	2,965	1.28	1.28	1.27	1.27	1.27	1.27	1.27
Cardenden	2,531	1,645	2,965	4.86	4.84	4.83	4.82	4.82	4.81	4.81
Burntisland	1,620	1,053	2,965	3.11	3.10	3.09	3.09	3.08	3.08	3.08
Kinghorn & Aberdour	948	616	2,965	1.82	1.81	1.81	1.81	1.80	1.80	1.80
Sub Total	34,339	20,970		155.59	154.97	154.66	154.35	154.04	153.73	154.04
Glenrothes Town Centre										
Morrisons (6,968 sq. m gross, 62% gross conv)	4,320	2,160	12,635	27.21	27.10	27.05	26.99	26.94	26.89	26.94
Lidl (1,000 sq. m gross, 90% gross conv)	900	675	4,159	2.80	2.79	2.78	2.78	2.77	2.77	2.77
Aldi (1,300 sq. m + 206 sq.m gross extension, 85% gross conv)	1,280	960	6,771	6.48	6.46	6.44	6.43	6.42	6.40	6.42
Rest of Town Centre	3,460	2,249	5,930	13.30	13.24	13.22	13.19	13.16	13.14	13.16
Sub Total	9,960	6,044		49.79	49.59	49.49	49.39	49.29	49.19	49.29
ASDA, Glenrothes, (7,897 sq. m gross, 55% gross conv)	4,343	2,606	12,394	32.20	32.07	32.01	31.95	31.88	31.82	31.88
Iceland, Glenwood Centre, Glenrothes	717	624	7,304	4.54	4.52	4.52	4.51	4.50	4.49	4.50
Other Glenrothes shops	4,422	2,874	2,965	8.50	8.46	8.45	8.43	8.41	8.40	8.41
Tesco, Glenwood Centre, Glenrothes	379	303	10,496	3.17	3.16	3.15	3.15	3.14	3.13	3.14
Leslie	835	543	2,965	1.60	1.60	1.59	1.59	1.59	1.59	1.59
Markinch	764	497	2,965	1.47	1.46	1.46	1.46	1.45	1.45	1.45
Kinglassie & Thornton	935	608	2,965	1.80	1.79	1.79	1.78	1.78	1.78	1.78
Falkland & Freuchie	410	267	2,965	0.79	0.78	0.78	0.78	0.78	0.78	0.78
Ladybank & Kettlebridge	355	231	2,965	0.68	0.68	0.68	0.68	0.68	0.67	0.68
Sub Total	13,160	8,552		54.75	54.53	54.43	54.32	54.21	54.10	54.21
Leven Town Centre										
Sainsburys (4,345 sq. m gross, 93% gross conv)	4,049	2,430	10,904	26.41	26.31	26.25	26.20	26.15	26.10	26.15
Lidl (1,060 sq m gross, 90% gross conv)	954	716	4,159	2.97	2.95	2.95	2.94	2.94	2.93	2.94
Rest of Town Centre	2,340	1,521	3,558	5.40	5.37	5.36	5.35	5.34	5.33	5.34
Sub Total	7,343	4,666		34.77	34.64	34.57	34.50	34.43	34.36	34.43
East Wemyss	395	257	2,965	0.76	0.76	0.75	0.75	0.75	0.75	0.75
Aldi, Turpie Road, Leven	1,184	792	6,771	5.35	5.33	5.31	5.30	5.29	5.28	5.29
Methil/ Methilhill	3,325	2,161	2,965	6.39	6.36	6.35	6.34	6.33	6.31	6.33
Buckhaven	1,736	1,128	2,965	3.34	3.32	3.32	3.31	3.30	3.30	3.30
Kennoway & Windygates & Upper Largo	1,108	720	2,965	2.13	2.12	2.12	2.11	2.11	2.10	2.11
Lundin Links & Lower Largo	329	214	2,965	0.63	0.63	0.63	0.63	0.63	0.62	0.63
Sub Total	8,077	5,272		18.59	18.52	18.48	18.44	18.41	18.37	18.41
Total Mid Fife	78,362	49,185		336.23	334.89	334.22	333.55	332.88	332.22	332.88

Notes:

1. 2012 prices
2. Gross floorspace for town centre shops based on Goad 2015 data
3. Other gross floorspace provided by Fife Council based on their 2007 floorspace survey or planning applications
4. Gross:net ratio of small towns floorspace is 35:65
5. Aldi, Turpie Road, Leven 1,480 sq.m gross, gross:net ratio 67:33 and 80:20 conv:comp
6. Supermarket benchmark turnover ratios based on Retail Rankings 2013, adjusted to remove non-retail sales and add VAT
7. Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2014 Retail Study figures
8. Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)

Table 4.3: East Fife Convenience Floorspace and Turnover

East Fife Catchment Area	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2015	2016	2017	2018	2019	2020	2025
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
St Andrews Town Centre										
Tesco Metro	1,560	1,092	10,496	11.43	11.38	11.36	11.34	11.31	11.29	11.31
Sainsbury's Local	580	464	15,941	7.37	7.34	7.33	7.32	7.30	7.29	7.30
Rest of Town Centre	3,010	1,957	5,098	9.94	9.90	9.88	9.86	9.85	9.83	9.85
Sub Total	5,150	3,513		28.75	28.63	28.57	28.52	28.46	28.40	28.46
Morrisons, St Andrews	3,740	1,870	12,635	23.56	23.46	23.42	23.37	23.32	23.28	23.32
Aldi, St Andrews (1,331 sq. m gross, 80% gross conv)	1,065	799	6,771	5.39	5.37	5.36	5.35	5.34	5.33	5.34
M&S Simply Food, Largo Road, St Andrews	1,395	907	10,522	9.51	9.48	9.46	9.44	9.42	9.40	9.42
Other St Andrews shops	606	394	2,965	1.16	1.16	1.16	1.16	1.15	1.15	1.15
Balmullo, Guardbridge, Kingsbarns, Leuchars, S'kinness	1,410	917	2,965	2.71	2.70	2.69	2.69	2.68	2.68	2.68
Sub Total	8,216	4,886		42.34	42.17	42.08	42.00	41.91	41.83	41.91
Cupar Town Centre										
Co-op	1,200	780	8,863	6.89	6.86	6.85	6.84	6.82	6.81	6.82
Lidl (2,000 sq. m gross, 80% gross conv)	1,600	1,200	4,159	4.98	4.96	4.95	4.94	4.93	4.92	4.93
Rest of Town Centre	2,310	1,502	4,078	6.11	6.08	6.07	6.06	6.04	6.03	6.04
Sub Total	5,110	3,482		17.97	17.90	17.87	17.83	17.79	17.76	17.79
Tesco, Cupar	2,004	1,202	10,496	12.58	12.53	12.51	12.48	12.46	12.43	12.46
Aldi, South Road, Cupar (1,587 sq. m gross; 1,140 sq. m net)	1,587	844	6,771	5.70	5.67	5.66	5.65	5.64	5.63	5.64
Ceres & Dairsie	566	368	2,965	1.09	1.08	1.08	1.08	1.08	1.07	1.08
Anstruther	620	403	2,965	1.19	1.19	1.18	1.18	1.18	1.18	1.18
Cellardyke & Crail & St Monans & Pittenweem	1,262	820	2,965	2.43	2.42	2.41	2.41	2.40	2.40	2.40
Elie & Colinsburgh	405	263	2,965	0.78	0.78	0.77	0.77	0.77	0.77	0.77
Tayport/Wormit & Newport	1,523	990	2,965	2.93	2.91	2.91	2.90	2.90	2.89	2.90
Newburgh & Strathmiglo & Auchtermuchty	946	615	2,965	1.82	1.81	1.81	1.80	1.80	1.80	1.80
Sub Total	8,913	5,506		28.51	28.39	28.34	28.28	28.22	28.17	28.22
Total East Fife	27,389	17,386		117.56	117.09	116.86	116.62	116.39	116.16	116.39

Notes:

1. 2012 prices
2. Gross floorspace for town centre shops based on Goad 2015 data
3. Other gross floorspace provided by Fife Council based on their 2007 floorspace survey or planning applications
4. Gross:net ratio of small towns floorspace is 35:65
5. Supermarket benchmark turnover ratios based on Retail Rankings 2013, adjusted to remove non-retail sales and add VAT
6. Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2014 Fife Retail Study figures
7. Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)

Table 5: Convenience Expenditure Estimated % Net Flows 2015 (Based on the NEMS 2009 Household Survey)

Convenience Goods Flow	Outflow	Inflow	2015 Net Leakage Adjustment	Net Flow
Catchment Area	NEMS 2009	NEMS 2009		
West Fife	6%	10%	1%	5%
Mid Fife	9%	6%	1%	-2%
East Fife	34%	5%	11%	-18%
Outflows from Fife as a whole	5%			

Notes:

1. West Fife 2015 adjustment of 1% to 2009 Net Leakage of 6%, due to addition of Tesco, Carnegie Drive, Dunfermline, Aldi in Dalgety Bay and Cowdenbeath
2. Mid Fife 2015 adjustment of 1% to 2009 Net Leakage of 9% due to Morrisons store in Kirkcaldy. Loss of Tesco in Kirkcaldy is balanced by M&S Simply Food at Fife Central RP hence no net change
3. East Fife 2015 adjustment of 11% to 2009 Net Leakage of 34% due to addition of Aldi, Lidl, in Cupar and Aldi, Sainsburys Local and Marks & Spencer Simply Food in St Andrews

Table 6: Estimated Convenience Goods Turnover of Commitments within Catchment Area

	Floorspace sq. m		Average turnover ratio £/sq. m	2015 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net				
West Fife						
Supermarket, North End Park, Cowdenbeath - London & Scottish Investments Ltd acquired site. Total 4,300 sq. m gross. Net 2,573 sq. m. (conv 1,858 sq m comp 715 sq m) Consent Issued and S69 Signed (13/00190/FULL)	3,105	1,858	11,607	21.50	21.24	21.29
South Fod Neighbourhood Centre 14/00196/PPP granted for local centre, including neighbourhood shopping scheme, care home and community centre (Renewal of planning permission 08/01306/WOPP, 11/06073/FULL) Dunfermline Eastern Expansion - Total supermarket 2,323 sq m gross (Also see other consent on same site below)	2,323	1,394	11,607	16.13	15.94	15.97
Freescall Site (Shepherd Offshore), Supermarket, Dunfermline East - (Ref. 14/00809/FULL Section 42 application to vary developable areas under Condition No.1 and related masterplanning consent 14/00685 ARC) (Estimated 60:40 net:gross)	3,000	1,800	11,607	20.83	20.58	20.62
Sub Total		5,052		58.46	57.76	57.88
Mid Fife						
Kingslaw Village and Burnside Neighbourhood, Kirkcaldy (2x neighbourhood centres with retail) - Phase 1, Kingslaw Village: neighbourhood centre (supermarket of 370 sq m gross). Phase 3, Burnside Neighbourhood. Retail including a supermarket of 1,500 sq m gross, Application Approved Subject to Legal Agreement (10/01774/EIA)	1,870	1,122	11,607	12.98	12.83	12.85
Aldi Extension, Mckenzie Street, Kirkcaldy (Planning Permission ref: 15/01600/FULL)	542	379	6,771	2.56	2.53	2.54
Saltire Retail Park Class 1 extension	3,085	247	2,965	0.73	0.72	0.72
M&S Simply Food, Fife Central Retail Park	1,275	837	10,522	8.78	8.68	8.69
Sub Total		1,122		25.06	24.76	24.81
East Fife						
Former Tesco site, South Road, Cupar - now owned by London & Scottish Investments Ltd (Net increase of 730 sq. m convenience) (08/01079/EFULL)		730	10,496	7.64	7.55	7.56
Sub Total		730		7.64	7.55	7.56

Notes:

1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified
2. Kingslaw Village and Burnside Neighbourhood, Kirkcaldy - Turnover ratio is based on assumption that the larger store is a national food retailer
3. Aldi Extension, Mckenzie Street, Kirkcaldy - Gross floorspace details from applicant's submitted information (estimate of 70:30 net:gross)
4. Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)
5. Estimated turnover for North End Park, Cowdenbeath based on average of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) at £11,607 per sq. m net
6. South Fod Neighbourhood Centre, net:gross for local retail units estimated at 80:20
7. As there are two alternative retail consents for South Fod, we have only included the single foodstore in the commitments for West Fife as this has the larger potential turnover (with alternative consent included in Table 7)

Table 7: Other Retail Applications above 2,500 sq.m gross, not treated as Deductions from Capacity

	Floorspace sq m		Average turnover ratio £/sq. m	2015 Turnover £m
	Gross	Net		
West Fife				
South Fod Neighbourhood Centre - Ref 14/00809/FULL Section 42 consent to vary Condition 1 (Note associated masterplan permission Ref 14/00685/ARC) Total 3,000 sq m gross Class 1 (6 retail units, estimate split as 30% conv, 30% comp and 40% services) NB. Same as as supermarket site above, could potentially progress if supermarket is not developed.	900	720	2,850	2.05
Pilmuir Works Redevelopment, Dunfermline - Total 5,496 sq. m gross of which 1,220 sq. m gross is intended for convenience retailing . Consent Issued (PP 11/01419/FULL) Site being marketed by Eric Young & Co	1,220	915	3,500	3.20
Mid Fife				
Supermarket, Fabteck Site, Lochgelly - 2,500 sq m gross. Application Approved. No progress	2,500			
CISWO, North Street/Kingdom Avenue (Application Ref: 15/03140/PPP - Pending consideration)	1,021	766	8,850	6.78
Queensgate, Glenrothes (Tullis Russell) Ref: 15/02008/PPP Revised proposal - application pending consideration		1,300	8,850	11.51

Notes:

1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified

Table 8.1: Summary of Capacity for Convenience Goods Floorspace in West Fife

West Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	264.75	275.07	286.52
Net Flow of Expenditure (%)	5%	5%	5%
Net Flow of Expenditure (£m)	13.24	13.75	14.33
Retained Expenditure (£m)	277.99	288.82	300.84
Benchmark Turnover of Existing Facilities (£m)	287.84	284.40	284.97
Turnover of Commitments (£m)	58.46	57.76	57.88
Residual Expenditure Capacity (£m)	-68.31	-53.34	-42.01

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)

Table 8.2: Summary of Capacity for Convenience Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	356.87	370.47	385.39
Net Flow of Expenditure (%)	-2%	-2%	-2%
Net Flow of Expenditure (£m)	-7.14	-7.41	-7.71
Retained Expenditure (£m)	349.73	363.06	377.68
Benchmark Turnover of Existing Facilities (£m)	336.23	332.22	332.88
Turnover of Commitments (£m)	25.06	24.76	24.81
Residual Expenditure Capacity (£m)	-11.56	6.09	20.00
Top Four' Foodstore Turnover per sq. m (£m)	11,572	11,434	11,457
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)		346	1,135
Discounter' Foodstore Turnover per sq. m (£m)	6,090	6,017	6,029
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)		759	2,488
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)		533	1,746
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)		1,013	3,317

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq. m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq. m net in 2014
4. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
5. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
6. 'Top Four' and 'Discounter' Turnovers projected using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant convenience goods proposal

Table 8.3: Summary of Capacity for Convenience Goods Floorspace in East Fife

East Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	142.12	147.38	153.26
Net Flow of Expenditure (%)	-18%	-18%	-18%
Net Flow of Expenditure (£m)	-25.58	-26.53	-27.59
Retained Expenditure (£m)	116.54	120.85	125.67
Benchmark Turnover of Existing Facilities (£m)	117.56	116.16	116.39
Turnover of Commitments (£m)	7.64	7.55	7.56
Residual Expenditure Capacity (£m)	-8.66	-2.86	1.72
Top Four ¹ Foodstore Turnover per sq m (£m)			11,457
Net Floorspace Equivalent ² 'Top Four' Foodstore (sq m)			98
Discounter ³ Foodstore Turnover per sq m (£m)			6,029
Net Floorspace Equivalent ⁴ 'Discounter' Foodstore (sq m)			214
Gross Floorspace Equivalent ⁵ 'Top Four' Foodstore (sq m)			150
Gross Floorspace Equivalent ⁵ 'Discounter' Foodstore (sq m)			285

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq. m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq. m net in 2014
4. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
5. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
6. 'Top Four' and 'Discounter' Turnovers projected using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant convenience goods proposal

Table 9.1: Summary of Capacity for Convenience Goods Floorspace in West Fife - Increase in Clawback to 2025

West Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	264.75	275.07	286.52
Net Flow of Expenditure (%)	5%	5%	5%
Net Flow of Expenditure (£m)	13.24	13.75	14.33
Retained Expenditure (£m)	277.99	288.82	300.84
Leakage 6% (from Table 5)	16.68	17.33	18.05
Clawback of 25% leakage (£m)	4.17	4.33	4.51
Clawback of 50% leakage (£m)	8.34	8.66	9.03
Benchmark Turnover of Existing Facilities (£m)	287.84	284.40	284.97
Turnover of Commitments (£m)	58.46	57.76	57.88
Residual Expenditure Capacity (£m)	-68.31	-53.34	-42.01
Residual Expenditure Capacity (£m) with 25% clawback	-64.14	-49.01	-37.49
Residual Expenditure Capacity (£m) with 50% clawback	-59.97	-44.68	-32.98

Notes:

1. Commitments as agreed with Fife Council (from Table 6)

Table 9.2: Summary of Capacity for Convenience Goods Floorspace in Mid Fife – Increase in Clawback to 2025

Mid Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	356.87	370.47	385.39
Net Flow of Expenditure (%)	-2%	-2%	-2%
Net Flow of Expenditure (£m)	-7.14	-7.41	-7.71
Retained Expenditure (£m)	349.73	363.06	377.68
Leakage 9% (from Table 5)	31.48	32.68	33.99
Clawback of 25% leakage (£m)	7.87	8.17	8.50
Clawback of 50% leakage (£m)	15.74	16.34	17.00
Benchmark Turnover of Existing Facilities (£m)	336.23	332.22	332.88
Turnover of Commitments (£m)	25.06	24.76	24.81
Residual Expenditure Capacity (£m)	-11.56	6.09	20.00
Residual Expenditure Capacity (£m) with 25% clawback	-3.69	14.26	28.50
Top Four' Foodstore Turnover per sq. m (£m)		11,434	11,457
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)		1,247	2,487
Discounter' Foodstore Turnover per sq. m (£m)		6,017	6,029
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)		2,370	4,726
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)		1,919	3,827
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)		3,160	6,302
Residual Expenditure Capacity (£m) with 50% clawback	4.18	22.43	37.00
Top Four' Foodstore Turnover per sq. m (£m)	11,572	11,434	11,457
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)	361	1,962	3,229
Discounter' Foodstore Turnover per sq. m (£m)	6,090	6,017	6,029
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)	687	3,728	6,136
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)	556	3,018	4,968
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)	916	4,970	8,181

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq. m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq. m net in 2014
4. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
5. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
6. 'Top Four' and 'Discounter' Turnovers projected using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant convenience goods proposal

Table 9.3: Summary of Capacity for Convenience Goods Floorspace in East Fife – Increase in Clawback to 2025

East Fife Catchment Area	2015	2020	2025
Total Available Convenience Goods Expenditure (£m)	142.12	147.38	153.26
Net Flow of Expenditure (%)	-18%	-18%	-18%
Net Flow of Expenditure (£m)	-25.58	-26.53	-27.59
Retained Expenditure (£m)	116.54	120.85	125.67
Leakage 34% (from Table 5)	39.62	41.09	42.73
Clawback of 25% leakage (£m)	9.91	10.27	10.68
Clawback of 50% leakage (£m)	19.81	20.54	21.36
Benchmark Turnover of Existing Facilities (£m)	117.56	116.16	116.39
Turnover of Commitments (£m)	7.64	7.55	7.56
Residual Expenditure Capacity (£m)	-8.66	-2.86	1.72
Residual Expenditure Capacity (£m) with 25% clawback	1.25	7.42	12.40
Top Four' Foodstore Turnover per sq. m (£m)		11,434	11,457
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)		649	1,083
Discounter' Foodstore Turnover per sq. m (£m)		6,017	6,029
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)		1,232	2,057
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)		998	1,665
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)		1,643	2,743
Residual Expenditure Capacity (£m) with 50% clawback	11.15	17.69	23.09
Top Four' Foodstore Turnover per sq. m (£m)	11,572	11,434	11,457
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)	964	1,547	2,015
Discounter' Foodstore Turnover per sq. m (£m)	6,090	6,017	6,029
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)	1,831	2,940	3,829
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)	1,482	2,380	3,100
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)	2,441	3,919	5,105

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq. m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq. m net in 2014
4. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
5. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
6. 'Top Four' and 'Discounter' Turnovers projected using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4a (2015, -0.3%; 2016, -0.4%; 2017-2021, -0.2%; 2022-2025, 0.1%)
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant convenience goods proposal

Appendix C
Comparison Goods Capacity Assessment

Table 1: Catchment Area Population Projections

Catchment Area	2015	2020	2025	Growth 2015-25
West Fife	126,571	129,483	132,136	5,565
Mid Fife	178,270	182,220	185,713	7,443
East Fife	67,852	69,279	70,583	2,731
Total Fife	372,693	380,982	388,432	15,739

Notes:

1. Population data from 'Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife, based on post 2011 Census data
2. The population of 'Clackmannan' from postcode sector FK10 4 has been excluded from West Fife

Table 2.1: Comparison Goods Expenditure per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	2,152	2,141	2,152	2,161	2,174	2,187	2,200	2,213	2,226	2,240	2,253	2,266	2,280
Mid Fife	2,060	2,049	2,060	2,068	2,080	2,093	2,105	2,118	2,131	2,143	2,156	2,169	2,182
East Fife	2,155	2,144	2,155	2,164	2,177	2,190	2,203	2,216	2,229	2,243	2,256	2,270	2,283

Notes:

1. 2012 Prices
2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
3. Expenditure per head projected using Experian Forecast convenience goods expenditure per head growth rates from Experian Retail Planner Briefing Note 12.1 (October 2014) Figure 1a (2014: -0.5, 2015: 0.5, 2016: 0.4, 2017-25: 0.6 (annual average over 14 years 2022-35))

Table 2.2: Comparison Goods Expenditure per Head (£) with NSRT Deduction

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	2,103	2,086	2,092	2,094	2,102	2,108	2,116	2,124	2,128	2,137	2,147	2,158	2,168
Mid Fife	2,012	1,996	2,002	2,004	2,012	2,017	2,025	2,033	2,037	2,045	2,055	2,065	2,075
East Fife	2,105	2,088	2,095	2,096	2,105	2,111	2,119	2,127	2,131	2,139	2,150	2,161	2,171
Proportion of Expenditure Accounted for by NSRT Means (%)	2.3	2.6	2.8	3.1	3.3	3.6	3.8	4.0	4.4	4.6	4.7	4.8	4.9

Notes:

1. 2012 prices
2. Base comparison goods expenditure per head for 2015-2025 taken from Table 2.1
3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 12.1, October 2014
5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 70% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 12.1, October 2014

Table 2.3: Bulky Goods Expenditure per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	730	773	810	836	865	895	927	959	993	1,027	1,063	1,100	1,139
Mid Fife	668	707	741	765	791	819	848	877	908	940	973	1,007	1,042
East Fife	748	792	830	857	887	918	950	984	1,018	1,054	1,090	1,129	1,168

Notes:

1. 2012 Prices
2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
3. Expenditure per head projected using Experian Forecast convenience goods expenditure per head growth rates from Experian Retail Planner Briefing Note 12.1 (October 2014) Figure 1a (2014: -0.5, 2015: 0.5, 2016: 0.4, 2017-25: 0.6 (annual average over 14 years 2022-35))

Table 2.4: Bulky Goods Expenditure per Head (£) with NSRT Deduction

Catchment Area	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
West Fife	649	682	709	725	744	764	785	808	835	863	893	924	958
Mid Fife	593	624	648	664	681	699	718	740	764	790	817	846	876
East Fife	665	700	727	744	763	783	805	829	856	885	916	948	982
Proportion of Expenditure Accounted for by NSRT Means (%)	11.1	11.7	12.5	13.2	14.0	14.7	15.3	15.7	15.9	16.0	16.0	16.0	15.9

Notes:

1. 2012 prices
2. Base bulky goods expenditure per head for 2015-2025 taken from Table 2.3
3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 12.1, October 2014
5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 70% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 12.1, October 2014

Table 3.1: Total Available Comparison Expenditure (£m)

Catchment Area				Growth in Comparison Goods Expenditure
	2015	2020	2025	2015 - 2025
West Fife	380.91	437.34	522.70	141.79
Mid Fife	479.35	549.90	656.39	177.03
East Fife	208.66	239.10	285.31	76.65
Total Fife	1,068.92	1,226.34	1,464.39	395.47

Notes:

1. 2012 prices
2. Total available comparison goods expenditure for each catchment area obtained by multiplying Table 1 (Population) by Table 2.2 (Expenditure per head minus NSRT adjustment)

Table 3.2: Total Available Bulky Goods Expenditure (£m)

Catchment Area				Growth in Bulky Goods Expenditure 2015 - 2025
	2015	2020	2025	
West Fife	89.69	104.68	126.57	36.89
Mid Fife	115.57	134.78	162.76	47.19
East Fife	49.31	57.44	69.34	20.03
Total Fife	254.56	296.90	358.67	104.11

Notes:

1. 2012 prices
2. Total available bulky goods expenditure for each catchment area obtained by multiplying Table 1 (Population) by Table 2.4 (Expenditure per head minus NSRT adjustment)

Table 4.1: West Fife Comparison Retail Floorspace and Turnover

West Fife Catchment Area	Floorspace sq. m		Turnover ratio £/sq. m	2015	2016	2017	2018	2019	2020	2025
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Town Centres										
Dunfermline	37,910	26,537	4,516	124.39	127.25	129.80	132.39	135.04	137.74	153.27
Rest of Dunfermline	3,966	2,578	2,258	6.04	6.18	6.30	6.43	6.56	6.69	7.44
Cowdenbeath	4,020	2,613	2,709	7.35	7.52	7.67	7.82	7.98	8.14	9.05
Kelty	630	410	2,258	0.96	0.98	1.00	1.02	1.04	1.06	1.18
Kincardine	220	143	2,258	0.34	0.34	0.35	0.36	0.36	0.37	0.41
Inverkeithing	990	644	2,258	1.51	1.54	1.57	1.61	1.64	1.67	1.86
Dobbies	3,694	2,401	2,258	5.63	5.76	5.87	5.99	6.11	6.23	6.93
Rest of West Fife	1,870	1,216	2,258	2.85	2.91	2.97	3.03	3.09	3.15	3.51
Sub Total	53,300	36,541		149.06	152.49	155.54	158.65	161.82	165.06	183.67
Supermarkets non food										
ASDA Halbeath (10,702 sq. m gross, 45% gross comp)	4,816	2,890	8,056	24.16	24.72	25.21	25.72	26.23	26.76	29.77
ASDA St Leonards (4,749 sq. m gross, 25% gross comp)	1,187	712	8,056	5.96	6.09	6.22	6.34	6.47	6.60	7.34
Tesco Dulloch	3,249	1,949	6,822	13.80	14.12	14.40	14.69	14.99	15.29	17.01
Tesco Carnegie Drive, Dunfermline	6,515	1,368	6,822	9.69	9.91	10.11	10.31	10.52	10.73	11.94
ASDA Dalgety Bay (3,427 sq. m gross, 20% gross comp)	685	411	8,056	3.44	3.52	3.59	3.66	3.73	3.81	4.24
Aldi, Stenhouse Street, Cowdenbeath		296	4,580	1.41	1.44	1.47	1.50	1.53	1.56	1.73
Aldi Donnibristle, Dalgety Bay (1,125 sq.m net 26% comp)	1,574	293	4,580	1.39	1.42	1.45	1.48	1.51	1.54	1.71
Sub Total	16,453	7,331		59.85	61.23	62.45	63.70	64.97	66.27	73.75
Retail Warehouses										
Carnegie Retail Park										
B & Q	3,480	2,784	2,086	6.03	6.17	6.29	6.42	6.54	6.68	7.43
Ponden Superstore	390	312	2,300	0.74	0.76	0.78	0.79	0.81	0.82	0.92
Bensons	400	320	2,348	0.78	0.80	0.81	0.83	0.85	0.86	0.96
Dreams	1,030	824	1,200	1.03	1.05	1.07	1.09	1.11	1.14	1.26
Matalan	2,000	1,600	2,300	3.82	3.91	3.99	4.07	4.15	4.23	4.71
Home Bargains	1,010	808	4,566	3.83	3.92	4.00	4.08	4.16	4.24	4.72
Sub Total (excluding Halfords and vacant units)	8,310	6,648		16.23	16.60	16.93	17.27	17.62	17.97	20.00
Halbeath Retail Park										
Currys & PC World inc.The Carphone Warehouse	1,160	928	6,239	6.01	6.15	6.27	6.40	6.52	6.65	7.41
Carpentryright	970	776	1,125	0.91	0.93	0.95	0.96	0.98	1.00	1.12
Harveys Furnishings	960	768	2,348	1.87	1.91	1.95	1.99	2.03	2.07	2.31
B&M	1,800	1,440	4,566	6.82	6.98	7.12	7.26	7.41	7.56	8.41
Homebase	3,450	2,760	1,275	3.65	3.74	3.81	3.89	3.97	4.04	4.50
Argos	470	118	18,756	2.29	2.34	2.39	2.43	2.48	2.53	2.82
Pets at Home	2,890	2,312	2,593	6.22	6.37	6.49	6.62	6.76	6.89	7.67
Halfords (auto parts, non retail)										
Sub Total	11,700	9,102		27.78	28.41	28.98	29.56	30.15	30.76	34.23
Other Retail Warehouses										
Bed Shed, Baldrigeburn	1,110	888	1,300	1.20	1.23	1.25	1.28	1.30	1.33	1.48
Thomsons World of Furniture	2,500	2,000	900	1.87	1.91	1.95	1.99	2.03	2.07	2.30
Connections Furniture, Nethertown	450	360	900	0.34	0.34	0.35	0.36	0.37	0.37	0.41
Sub Total	4,060	3,248		3.40	3.48	3.55	3.62	3.69	3.77	4.19
Total West Fife	93,823	62,869		256.32	262.21	267.46	272.81	278.26	283.83	315.83

Notes:

- Gross floorspace for town centre shops based on Goad 2015 data
- 'Rest of Dunfermline' and 'Rest of West Fife' floorspace provided by Fife Council, based on their 2007 floorspace survey.
- Supermarket and Retail Warehouse floorspace data based on information from Goad 2015 and Fife Council
- Gross:net ratio of large towns floorspace is 30:70
- Gross:net ratio of small towns floorspace is 35:65
- Gross:net ratio of supermarket floorspace is 40:60
- Gross:net ratio of retail park/warehouse floorspace is 20:80
- Tesco Dulloch (6,147 sq. m gross, 18% gross comp + 2,747 sq. m gross extension, 78% comp)
- Tesco Carnegie Drive, Dunfermline (6,515 sq.m gross with gross:net ratio 70/30 and est. conv:comp 70:30 split)
- Aldi, Stenhouse Street, Cowdenbeath, 1,587 sq. m gross (1,140 sq. m net) (conv:comp 74:26)
- Gross floorspace figure for Dunfermline Town Centre based on Goad 2015 data and includes upper floors where applicable
- Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2014
- Retail sales density growth rates using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)

Table 4.2: Mid Fife Comparison Retail Floorspace and Turnover

Mid Fife Catchment Area	Floorspace sq. m		Turnover ratio £/sq. m	2015 Turnover £m	2016 Turnover £m	2017 Turnover £m	2018 Turnover £m	2019 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net								
Town Centres										
Kirkcaldy	39,990	27,993	4,873	141.61	144.86	147.76	150.71	153.73	156.80	174.49
Rest of Kirkcaldy	9,913	6,443	2,436	16.29	16.67	17.00	17.34	17.69	18.04	20.08
Glenrothes	17,550	12,285	4,873	62.14	63.57	64.85	66.14	67.47	68.81	76.57
Rest of Glenrothes	1,794	1,166	2,436	2.95	3.02	3.08	3.14	3.20	3.27	3.63
Leven (excluding Riverside Retail Park)	6,380	4,147	2,924	12.59	12.88	13.13	13.40	13.66	13.94	15.51
Burntisland	690	449	2,436	1.13	1.16	1.18	1.21	1.23	1.26	1.40
Lochgelly	3,000	1,950	2,436	4.93	5.04	5.15	5.25	5.35	5.46	6.08
Falkland, Ladybank, Lundinlinks, Kingskettle, L Ward	1,722	1,119	2,436	2.83	2.90	2.95	3.01	3.07	3.13	3.49
Rest of Mid Fife	7,906	5,139	2,436	13.00	13.29	13.56	13.83	14.11	14.39	16.01
Sub Total	88,945	60,691		257.47	263.39	268.66	274.03	279.51	285.10	317.25
Supermarkets Non Food										
ASDA Kirkcaldy (11,889 sq m gross, 40% gross comp)	4,756	2,568	8,056	21.47	21.97	22.41	22.86	23.31	23.78	26.46
Sainsbury Kirkcaldy (5,819 sq m gross, 15% gross comp)	873	524	7,088	3.85	3.94	4.02	4.10	4.18	4.27	4.75
Aldi Glenrothes (206 sq.m gross extension , est.15% gross comp)	31	30	4,580	0.14	0.15	0.15	0.15	0.15	0.16	0.18
ASDA Glenrothes (7,897 sq m gross, 45% gross comp)	3,554	2,132	8,056	17.83	18.24	18.60	18.98	19.36	19.74	21.97
Morrisons Glenrothes (6,968 sq m gross, 38% gross comp)	2,648	1,324	8,213	11.29	11.55	11.78	12.01	12.25	12.50	13.91
Morrisons Inverlert (6,395 sq m gross, 20% gross comp)	1,279	703	8,213	6.00	6.13	6.26	6.38	6.51	6.64	7.39
Sub Total	13,140	7,281		60.58	61.98	63.22	64.48	65.77	67.09	74.65
Retail Warehouses										
Saltire Retail Park, Glenrothes										
Bensons	900	720	2,348	1.75	1.80	1.83	1.87	1.91	1.94	2.16
Matalan	3,160	2,528	2,300	6.04	6.17	6.30	6.42	6.55	6.68	7.44
Brantano	1,020	816	993	0.84	0.86	0.88	0.90	0.91	0.93	1.04
Homebase	3,420	2,736	1,275	3.62	3.70	3.78	3.85	3.93	4.01	4.46
Carpetright	880	704	1,125	0.82	0.84	0.86	0.87	0.89	0.91	1.01
Poundstretcher	2,420	1,936	1,865	3.75	3.83	3.91	3.99	4.07	4.15	4.62
The Pet Hut	580	464	2,593	1.25	1.28	1.30	1.33	1.36	1.38	1.54
Sub Total	12,380	9,904		18.07	18.49	18.86	19.23	19.62	20.01	22.27
Fife Central Retail Park, Kirkcaldy										
Next	2,040	1,632	4,430	7.50	7.68	7.83	7.99	8.15	8.31	9.25
Boots	1,160	928	6,500	6.26	6.41	6.53	6.66	6.80	6.93	7.72
Pets at Home	940	752	2,593	2.02	2.07	2.11	2.15	2.20	2.24	2.49
Homebase	2,910	2,328	1,275	3.08	3.15	3.21	3.28	3.34	3.41	3.80
Harveys Furnishings	750	600	2,348	1.46	1.50	1.53	1.56	1.59	1.62	1.80
Bensons Beds	780	624	2,348	1.52	1.56	1.59	1.62	1.65	1.68	1.87
Poundworld	600	480	1,865	0.93	0.95	0.97	0.99	1.01	1.03	1.14
Currys	1,470	1,176	6,239	7.62	7.79	7.95	8.11	8.27	8.43	9.38
B&Q	4,930	3,944	2,086	8.54	8.74	8.91	9.09	9.27	9.46	10.52
PC World	1,300	1,040	6,239	6.74	6.89	7.03	7.17	7.31	7.46	8.30
Mothercare & Early Learning Centre (combined unit)	1,470	1,176	3,585	4.38	4.48	4.57	4.66	4.75	4.85	5.39
Argos	1,410	353	18,756	6.86	7.02	7.16	7.30	7.45	7.60	8.46
Toys R Us	950	760	2,082	1.64	1.68	1.71	1.75	1.78	1.82	2.02
Halfords (non retail)										
Sub Total	20,710	15,793		58.56	59.90	61.10	62.32	63.57	64.84	72.15
Riverside Retail Park Leven										
B&M Homestore	1,530	1,224	4,566	5.80	5.93	6.05	6.17	6.30	6.42	7.15
Argos	880	220	18,756	4.28	4.38	4.47	4.56	4.65	4.74	5.28
B&Q	2,650	2,120	2,086	4.59	4.70	4.79	4.89	4.98	5.08	5.66
Homebargains	2,060	1,648	4,566	7.81	7.99	8.15	8.31	8.48	8.65	9.62
Sub Total	7,120	5,212		22.49	23.00	23.46	23.93	24.41	24.90	27.71
Other Retail Warehouses										
B&M Homestore, Flemington Road, Glenrothes	1,500	1,200	4,566	5.69	5.82	5.93	6.05	6.17	6.30	7.01
Stocks Discount, Kirkcaldy (Carpets)	2,291	1,833	1,000	1.90	1.95	1.99	2.02	2.07	2.11	2.34
Riverside Home Furnishings, Methil	1,550	1,240	1,000	1.29	1.32	1.34	1.37	1.40	1.43	1.59
Sub Total	5,341	4,273		8.88	9.08	9.26	9.45	9.64	9.83	10.94
Total Mid Fife	147,636	103,154		426.04	435.84	444.56	453.45	462.52	471.77	524.97

Notes:

- Gross floorspace for town centre shops based on Goad 2015 data
- Gross comparison floorspace for Burntisland, Falkland, Ladybank, Lundinlinks, Kingskettle and L. Ward based on the Council's 2007 floorspace survey
- Gross comparison floorspace for Rest of Kirkcaldy, Glenrothes and Mid Fife based on the Council's 2007 floorspace survey
- Supermarket and Retail Warehouse floorspace data based on information from Goad 2015 and Fife Council
- Boots average turnover adjusted from Retail Rankings 2013 figure of £10,764 per sq. m to £6,500 per sq. m to reflect locality as per 2014 Fife Retail Study
- Vacant units identified, but no floorspace noted or turnover attributed
- Gross:net ratio of large towns floorspace is 30:70
- Gross:net ratio of small towns floorspace is 35:65
- Gross:net ratio of retail park/warehouse floorspace is 20:80 (excluding Argos)
- Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2014 Fife Retail Study
- Retail sales density growth rates using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)

Table 4.3: East Fife Comparison Retail Floorspace and Turnover

East Fife Catchment Area	Floorspace sq. m		Average turnover ratio £/sq. m	2015 Turnover £m	2016 Turnover £m	2017 Turnover £m	2018 Turnover £m	2019 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net								
Town Centres										
St Andrews	16,270	10,576	3,692	40.53	41.46	42.29	43.14	44.00	44.88	49.94
Cupar	8,470	5,506	2,954	16.88	17.27	17.62	17.97	18.33	18.69	20.80
Anstruther	2,270	1,476	2,215	3.39	3.47	3.54	3.61	3.68	3.76	4.18
Other Floorspace	6,724	4,371	2,215	10.05	10.28	10.49	10.70	10.91	11.13	12.38
Supermarkets Non Food										
Aldi, Cupar (1,587 sq.m gross; 1,140 sq. m net; net comp 26%)	1,587	296	4,585	1.41	1.44	1.47	1.50	1.53	1.56	1.74
Total East Fife	33,734	21,927		72.27	73.93	75.41	76.92	78.45	80.02	89.05

Notes:

1. Gross comparison floorspace for town centre shops based on Goad 2015 data
2. Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey or planning applications
3. Gross:net ratio of all towns floorspace is 35:65
4. Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2014 Fife Retail Study figures
5. Retail sales density growth rates using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)

Table 5.1: Comparison Expenditure Estimated % Net Flows 2014 (Based on the NEMS 2009 Household Survey)

All Comparison Goods Flow	Outflow	Inflow	2015 Net Leakage Adjustment	2015 Net Inflow Adjustment	Net Flow
Catchment Area	NEMS 2009	NEMs 2009			
West Fife	30%	8%	0%	0%	-22%
Mid Fife	23%	10%	0%	0%	-13%
East Fife	80%	2%	15%	5%	-58%
Outflows from Fife as a whole	25%				

Notes:

1. As per the 2014 Fife Retail Study we have adjusted the outflows and inflows for East Fife due to the nature of the comparison offer in St. Andrews and its draw as a tourist destination

Table 5.2: Bulky Goods Expenditure Estimated % Net Flows 2014 (Based on the NEMS 2009 Household Survey)

Bulky Goods Flow	Outflow	Inflow	2015 Net Leakage Adjustment	Net Flow
Catchment Area	NEMs 2009	NEMs 2009		
West Fife	21%	11%	0%	-10%
Mid Fife	19%	10%	0%	-9%
East Fife	85%	1%	0%	-84%
Outflows from Fife as a whole	22%			

Table 6.1: Estimated Comparison Goods Turnover of Commitments within Catchment Area

	Floorspace sq. m		Average turnover ratio £/sq. m	2015 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net				
West Fife						
Supermarket, North End Park, Cowdenbeath - Site sold to London & Scottish Investments Ltd., total 4,300 sq. m gross. Net 2,573 sq. m. (conv 1,858 sq. m comp 715 sq. m). Consent Issued and S69 Signed (Application Ref: 13/00190/FULL)	1,191	715	6,822	5.06	5.61	6.24
South Fod Neighbourhood Centre - (Renewal application approved (14/00196/PPP) Total 3,000 sq m gross Class 1 (6 retail units, estimate split as 30% conv, 30% comp and 40% services)	900	540	2,200	1.23	1.37	1.52
Sub Total	2,091	1,255		6.30	6.97	7.76
Mid Fife						
Saltire Retail Park Class 1 extension	3,085	2,221	2,800	6.46	7.15	7.95
Queengate, Glenrothes (Tullis Russell) - Retail warehouses - Class 1 (plus Section 42 application 15/02008/PPP)	7,432	5,946	2,800	17.28	19.14	21.29
Sub Total	10,517	8,414		23.74	26.28	29.25
East Fife						
Tesco Replacement, South Road, Cupar - now owned by London & Scottish Investments Ltd (Gross 4,294 sq. m 25% comp) (Application Ref: 08/01079/FULL)	1,074	644	6,822	4.56	5.05	5.62
Sub Total		644		4.56	5.05	5.62

Notes:

1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified
2. Tesco Replacement, South Road, Cupar - Based on new gross floorspace of 4,294 sq. m (of which 75% is convenience) less 2,004 sq. m existing store
3. South Fod Neighbourhood Centre, net:gross for local retail units estimated at 60:40
4. Saltire Retail Park Extension, estimate 80:20 for net:gross and floorspace split as 90% comparison, 10% convenience
5. Retail sales density growth rates using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)

Table 6.2: Estimated % of Bulky Goods Floorspace in Comparison Commitments

	Floorspace sq. m		Average turnover ratio £/sq. m	2014 Turnover £m	Estimated % of Turnover from Bulky Goods	2015 Turnover £m	2020 Turnover £m	2025 Turnover £m
	Gross	Net						
West Fife								
Supermarket, North End Park, Cowdenbeath - Site sold to London & Scottish Investments Ltd., total 4,300 sq. m gross. Net 2,573 sq. m. (conv 1,858 sq. m comp 715 sq. m). Consent Issued and S69 Signed (Application Ref: 13/00190/FULL)	1,191	715	6,822	4.88	0	0.00	0.00	0.00
South Fod Neighbourhood Centre - (Renewal application approved (14/00196/PPP) Total 3,000 sq m gross Class 1 (6 retail units, estimate split as 30% conv, 30% comp and 40% services)	900	540	2,200	1.19	0	0.00	0.00	0.00
Sub Total	2,091	1,255		6.07		0.00	0.00	0.00
Mid Fife								
Saltire Retail Park extension (Class 1)	3,085	2,221	2,800	6.22	30	1.94	2.14	2.39
Queengate, Glenrothes (Tullis Russell) - Retail warehouses - Class 1 (plus Section 42 application 15/02008/PPP)	7,432	5,946	2,800	16.65	50	8.64	9.57	10.65
Sub Total	10,517	8,167		22.87		10.58	11.71	13.03
East Fife								
Tesco Replacement, South Road, Cupar - now owned by London & Scottish Investments Ltd (Gross 4,294 sq. m 25% comp) (Application Ref: 08/01079/FULL)	1,074	644	6,822	4.39	3	0.14	0.15	0.17
Sub Total		644	6,822	4.39		0.14	0.15	0.17

Notes:
 1. Retail sales density growth rates using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)

Table 7: Other Comparison Retail Applications above 2,500 sq.m gross, not treated as Deductions from Capacity

	Floorspace sq. m		Average turnover ratio £/sq. m	2015 Turnover £m
	Gross	Net		
West Fife				
Pilmuir Works redevelopment, Dunfermline - Total 5,496 sq. m gross of which 4,276 sq. m gross is intended for comparison retailing. Consent Issued (Application Ref: PP 11/01419/FULL) Site being marketed by Eric Young & Co	4,276	2,566	4,000	10.65
Mid Fife				
Kingslaw Village and Burnside Neighbourhood, Kirkcaldy (2x neighbourhood centres with retail) - Phase 1, Kingslaw Village: neighbourhood centre (14 retail units of 45 sq. m each (630 sq. m), 6 retail units of 128 sq. m each (768 sq. m). Phase 3, Burnside Neighbourhood. 3 comparison retail units of 560 sq. m, 580 sq. m & 720 sq. m gross. Application Approved Subject to Legal Agreement (Application Ref: 10/01774/EIA)	3,258	2,118	2,342	5.15
CISWO, North Street/Kingdom Avenue (Application Ref: 15/03140/PPP - Pending consideration)	1,281	1,025	3,833	4.08
Queensgate, Glenrothes (Tullis Russell) Ref: 15/02008/PPP Revised proposal - application pending consideration		7,000	3,500	25.43

Notes:
 1. Planning consents and applications agreed with Fife Council
 2. Assumptions made as to the use class of units in North Street proposals, with units 2 (418 sq. m), unit 3 (418 sq. m) and unit 4 (445 sq. m) for Class 1 comparison retailing
 3. North Street Units 2, 3 and 4 assumed clothing occupier such as Next, TK Maxx, Matalan or Sports Direct with average sales density/sq. m taken based on 2013 Retail Rankings

Table 8.1: Summary of Capacity for Comparison Goods Floorspace in West Fife

West Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	380.91	437.34	522.70
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-83.80	-96.21	-114.99
Retained Expenditure (£m)	297.11	341.12	407.71
Turnover of Existing Facilities (£m)	256.32	283.83	315.83
Turnover of Commitments (£m)	6.30	6.97	7.76
Residual Expenditure Capacity (£m)	34.50	50.32	84.11
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)	7,340	10,707	17,897
Gross Floorspace Equivalent (sq. m)	11,292	16,473	27,533

Notes:

- 2012 prices
- Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.1 and turnover of commitments from Table 6.1
- Commitments as agreed with Fife Council (as per Table 6.1)
- Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
- Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
- Gross floorspace equivalent assumes a gross to net ratio of 35:65
- Capacity for comparison goods floorspace includes bulky goods
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.2: Summary of Capacity for Comparison Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	479.35	549.90	656.39
Net Flow of Expenditure (%)	-13%	-13%	-13%
Net Flow of Expenditure (£m)	-62.32	-71.49	-85.33
Retained Expenditure (£m)	417.04	478.42	571.06
Turnover of Existing Facilities	426.04	471.77	524.97
Turnover of Commitments	23.74	26.28	29.25
Residual Expenditure Capacity	-32.74	-19.64	16.84
Comparison Goods Floorspace Turnover per sq. m	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)			3,583
Gross Floorspace Equivalent (sq. m)			5,512

Notes:

- 2012 prices
- Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.2 and turnover of commitments from Table 6.1
- Commitments as agreed with Fife Council (as per Table 6.1)
- Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
- Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
- Gross floorspace equivalent assumes a gross to net ratio of 35:65
- Capacity for comparison goods floorspace includes bulky goods
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.3: Summary of Capacity for Comparison Goods Floorspace in East Fife

East Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	208.66	239.10	285.31
Net Flow of Expenditure (%)	-58%	-58%	-58%
Net Flow of Expenditure (£m)	-121.02	-138.68	-165.48
Retained Expenditure (£m)	87.64	100.42	119.83
Turnover of Existing Facilities (£m)	72.27	80.02	89.05
Turnover of Commitments (£m)	4.56	5.05	5.62
Residual Expenditure Capacity (£m)	10.81	15.35	25.16
Comparison Goods Floorspace Turnover per sq. m	3,633	4,023	4,477
Net Floorspace Equivalent (sq. m)	2,975	3,815	5,621
Gross Floorspace Equivalent (sq. m)	4,577	5,870	8,647

Notes:

- 2012 prices
- Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.3 and turnover of commitments from Table 6.1
- Commitments as agreed with Fife Council (as per Table 6.1)
- For East Fife, comparison goods turnover per sq. m based on a turnover ratio of £3,500 per sq. m net in 2014
- Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
- Gross floorspace equivalent assumes a gross to net ratio of 35:65
- Capacity for comparison goods floorspace includes bulky goods
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.4: Summary of Capacity for Bulky Goods Floorspace in West Fife

West Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	89.69	104.68	126.57
Net Flow of Expenditure (%)	-10%	-10%	-10%
Net Flow of Expenditure (£m)	-8.97	-10.47	-12.66
Retained Expenditure (£m)	80.72	94.21	113.92
Turnover of Existing Facilities (£m)	25.11	27.80	30.94
Turnover of Commitments (£m)	0.00	0.00	0.00
Residual Expenditure Capacity (£m)	55.61	66.41	82.98
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	26,787	28,888	32,438
Gross Floorspace Equivalent (sq. m)	31,514	33,986	38,162

Notes:

- 2012 prices
- Commitments as agreed with Fife Council
- Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2 and turnover of commitments from Table 6.2
- Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
- Gross floorspace equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 8.5: Summary of Capacity for Bulky Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	115.57	134.78	162.76
Net Flow of Expenditure (%)	-9%	-9%	-9%
Net Flow of Expenditure (£m)	-10.40	-12.13	-14.65
Retained Expenditure (£m)	105.17	122.65	148.11
Turnover of Existing Facilities (£m)	47.53	52.63	58.56
Turnover of Commitments (£m)	10.58	11.71	13.03
Residual Expenditure Capacity (£m)	47.07	58.31	76.51
Bulky Goods Floorspace Turnover per sq.m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	22,671	25,365	29,911
Gross Floorspace Equivalent (sq. m)	26,672	29,841	35,190

Notes:

- 2012 prices
- Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2 and turnover of commitments from Table 6.2
- Commitments as agreed with Fife Council (as per Table 6.1)
- Bulky goods turnover per sq. m based on a turnover ratio of £2,000 per sq. m net in 2014
- Turnovers of commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
- Gross floorspace equivalent assumes a gross to net ratio of 85%
- Turnover of existing bulky goods facilities includes 30% of Argos comparison goods turnover at Riverside Retail Park and Fife Central Retail Park as estimated to be for bulky goods
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 8.6: Summary of Capacity for Bulky Goods Floorspace in East Fife

East Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	49.31	57.44	69.34
Net Flow of Expenditure (%)	-84%	-84%	-84%
Net Flow of Expenditure (£m)	-41.42	-48.25	-58.24
Retained Expenditure (£m)	7.89	9.19	11.09
Turnover of Existing Facilities (£m)	0	0	0
Turnover of Commitments (£m)	0.14	0.15	0.17
Residual Expenditure Capacity (£m)	7.75	9.04	10.93
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	3,734	3,932	4,271
Gross Floorspace Equivalent (sq. m)	4,393	4,626	5,025

Notes:

- 2012 prices
- Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2 and turnover of commitments from Table 6.2
- Commitments as agreed with Fife Council (as per Table 6.1)
- Bulky goods turnover per sq. m based on a turnover ratio of £2,000 per sq. m net in 2014
- Turnovers of commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
- Gross floorspace equivalent assumes a gross to net ratio of 85%
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.1: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in West Fife – Increase in Clawback to 2025

West Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	380.91	437.34	522.70
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-83.80	-96.21	-114.99
Retained Expenditure (£m)	297.11	341.12	407.71
Leakage 30% (from Table 5.1)	89.13	102.34	122.31
Clawback of 10% leakage (£m)	8.91	10.23	12.23
Clawback of 20% leakage (£m)	17.83	20.47	24.46
Turnover of Existing Facilities (£m)	256.32	283.83	315.83
Turnover of Commitments (£m)	6.30	6.97	7.76
Residual Expenditure Capacity (£m)	34.50	50.32	84.11
Residual Expenditure Capacity (£m) with 10% clawback	43.41	60.56	96.35
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)	8,898	11,210	16,027
Gross Floorspace Equivalent (sq. m)	13,690	17,246	24,657
Residual Expenditure Capacity (£m) with 20% clawback	52.32	70.79	108.58
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)	10,725	13,104	18,062
Gross Floorspace Equivalent (sq. m)	16,500	20,160	27,787

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.1 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.2: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in Mid Fife – Increase in Clawback to 2025

Mid Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	479.35	549.90	656.39
Net Flow of Expenditure (%)	-13%	-13%	-13%
Net Flow of Expenditure (£m)	-62.32	-71.49	-85.33
Retained Expenditure (£m)	417.04	478.42	571.06
Leakage 23% (from Table 5.1)	95.92	110.04	131.34
Clawback of 10% leakage (£m)	9.59	11.00	13.13
Clawback of 20% leakage (£m)	19.18	22.01	26.27
Turnover of Existing Facilities (£m)	426.04	471.77	524.97
Turnover of Commitments (£m)	23.74	26.28	29.25
Residual Expenditure Capacity (£m)	-32.74	-19.64	16.84
Residual Expenditure Capacity (£m) with 10% clawback	-23.15	-8.63	29.97
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)			4,986
Gross Floorspace Equivalent (sq. m)			7,671
Residual Expenditure Capacity (£m) with 20% clawback	-13.56	2.37	43.11
Comparison Goods Floorspace Turnover per sq. m (£)		5,402	6,011
Net Floorspace Equivalent (sq. m)		439	7,171
Gross Floorspace Equivalent (sq. m)		675	11,033

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.2 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.3: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in East Fife – Increase in Clawback to 2025

East Fife Catchment Area	2015	2020	2025
Total Available Comparison Goods Expenditure (£m)	208.66	239.10	285.31
Net Flow of Expenditure (%)	-58%	-58%	-58%
Net Flow of Expenditure (£m)	-121.02	-138.68	-165.48
Retained Expenditure (£m)	87.64	100.42	119.83
Leakage 80% (from Table 5.1)	70.11	80.34	95.86
Clawback of 5% leakage (£m)	3.51	4.02	4.79
Clawback of 10% leakage (£m)	7.01	8.03	9.59
Turnover of Existing Facilities (£m)	72.27	80.02	89.05
Turnover of Commitments (£m)	4.56	5.05	5.62
Residual Expenditure Capacity (£m)	10.81	15.35	25.16
Residual Expenditure Capacity (£m) with 5% clawback	14.31	19.37	29.95
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)	2,934	3,585	4,983
Gross Floorspace Equivalent (sq. m)	4,514	5,515	7,666
Residual Expenditure Capacity (£m) with 10% clawback	17.82	23.38	34.75
Comparison Goods Floorspace Turnover per sq. m (£)	4,879	5,402	6,011
Net Floorspace Equivalent (sq. m)	3,652	4,328	5,780
Gross Floorspace Equivalent (sq. m)	5,619	6,659	8,893

Notes:

- 2012 prices
- Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.3 and turnover of commitments from Table 6.1
- Commitments as agreed with Fife Council (as per Table 6.1)
- For East Fife, comparison goods turnover per sq. m based on a turnover ratio of £3,500 per sq. m net in 2014
- Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
- Gross floorspace equivalent assumes a gross to net ratio of 65%
- Capacity for comparison goods floorspace includes bulky goods
- All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.4: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in West Fife – Increase in Clawback to 2025

West Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	89.69	104.68	126.57
Net Flow of Expenditure (%)	-10%	-10%	-10%
Net Flow of Expenditure (£m)	-8.97	-10.47	-12.66
Retained Expenditure (£m)	80.72	94.21	113.92
Leakage 21% (from Table 5.2)	16.95	19.78	23.92
Clawback of 10% leakage (£m)	1.70	1.98	2.39
Clawback of 20% leakage (£m)	3.39	3.96	4.78
Turnover of Existing Facilities (£m)	25.11	27.80	30.94
Turnover of Commitments (£m)	0.00	0.00	0.00
Residual Expenditure Capacity (£m)	55.61	66.41	82.98
Residual Expenditure Capacity (£m) with 10% clawback	57.30	68.39	85.37
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	27,603	29,749	33,373
Gross Floorspace Equivalent (sq. m)	32,474	34,999	39,263
Residual Expenditure Capacity (£m) with 20% clawback	59.00	70.37	87.76
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	28,420	30,610	34,308
Gross Floorspace Equivalent (sq. m)	33,435	36,011	40,363

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 12.1 (Oct' 2014) Appendix 6
2. Only 'bulky goods' stores in the retail warehouse parks have been included in the calculation of turnover of existing facilities (from Table 4.1)
3. An estimated 30% of Argos' turnover has been included as bulky
4. Commitments as agreed with Fife Council (from Table 6.2)
5. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
6. Gross Floorspace Equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.5: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in Mid Fife – Increase in Clawback to 2025

Mid Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	115.57	134.78	162.76
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-25.43	-29.65	-35.81
Retained Expenditure (£m)	90.14	105.13	126.95
Leakage 19% (from Table 5.2)	17.13	19.97	24.12
Clawback of 10% leakage (£m)	1.71	2.00	2.41
Clawback of 20% leakage (£m)	3.43	3.99	4.82
Turnover of Existing Facilities (£m)	47.53	52.63	58.56
Turnover of Commitments (£m)	10.58	11.71	13.03
Residual Expenditure Capacity (£m)	32.04	40.79	55.36
Residual Expenditure Capacity (£m) with 10% clawback	33.75	42.79	57.77
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	16,259	18,612	22,583
Gross Floorspace Equivalent (sq. m)	19,129	21,897	26,568
Residual Expenditure Capacity (£m) with 20% clawback	35.47	44.78	60.18
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	17,084	19,481	23,526
Gross Floorspace Equivalent (sq. m)	20,099	22,919	27,677

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 12.1 (Oct' 2014) Appendix 6
2. Only 'bulky goods' stores in the retail warehouse parks have been included in the calculation of turnover of existing facilities (from Table 4.1)
3. An estimated 30% of Argos' turnover has been included as bulky
4. Commitments as agreed with Fife Council (from Table 6.2)
5. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
6. Gross Floorspace Equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.6: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in East Fife – Increase in Clawback to 2025

East Fife Catchment Area	2015	2020	2025
Total Available Bulky Goods Expenditure (£m)	49.31	57.44	69.34
Net Flow of Expenditure (%)	-84%	-84%	-84%
Net Flow of Expenditure (£m)	-41.42	-48.25	-58.24
Retained Expenditure (£m)	7.89	9.19	11.09
Leakage 85% (from Table 5.2)	6.71	7.81	9.43
Clawback of 5% leakage (£m)	0.34	0.39	0.47
Clawback of 10% leakage (£m)	0.67	0.78	0.94
Turnover of Existing Facilities (£m)	0	0	0
Turnover of Commitments (£m)	0.14	0.15	0.17
Residual Expenditure Capacity (£m)	7.75	9.04	10.93
Residual Expenditure Capacity (£m) with 5% clawback	8.09	9.43	11.40
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	3,896	4,102	4,455
Gross Floorspace Equivalent (sq. m)	4,583	4,826	5,242
Residual Expenditure Capacity (£m) with 10% clawback	8.42	9.82	11.87
Bulky Goods Floorspace Turnover per sq. m (£)	2,076	2,299	2,558
Net Floorspace Equivalent (sq. m)	4,057	4,272	4,640
Gross Floorspace Equivalent (sq. m)	4,773	5,026	5,458

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 12.1 (Oct' 2014) Appendix 6
2. Only 'bulky goods' stores in the retail warehouse parks have been included in the calculation of turnover of existing facilities (from Table 4.1)
3. Commitments as agreed with Fife Council (from Table 6.2)
4. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 12.1 Addendum (October 2014) Table 4b (2015, 3.8%; 2016, 2.3%; 2017-2021, 2.0%; 2022-2025, 2.2%)
5. Gross Floorspace Equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
6. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal