CARNEYSWEENEY

PLANNING AND REGENERATION

Planning and Retail Statement

DRAFT

Client Name: Lidl Great Britain Ltd

Site Address: Land at the A482, Cwmann, SA48 8DT

Date: September 2026

Document control

Document Version Control				
Revision No.	**Project Stage (if applicable)**	**Prepared by**	**Approved by**	**Date Issued**
1	PAC DRAFT	RJ	RM	Sep 2026

Contents

List of Appendices

CARNEYSWEENEY

SECTION 1

Introduction

1.0 Introduction

1.1 Background

1.1.1 This Planning and Retail Statement (PRS) has been prepared by CarneySweeney on behalf of Lidl Great Britain Limited ('Lidl') in support of a full planning application for the erection of a foodstore, together with access, parking, landscaping, drainage and associated development on land at the A482 Cwmann, Lampeter.

1.1.2 Lidl is one of the UK's leading food retailers and is committed to expanding its network of modern, discount foodstores in locations where it can improve consumer choice, increase competition and provide accessible, affordable food shopping.

1.1.3 The application site occupies a sustainable edge-of-settlement location close to Lampeter town centre and is well positioned to serve Cwmann, Lampeter and the wider rural catchment. The proposal seeks to provide a modern foodstore capable of meeting local shopping needs, locally; contributing to local economic growth, employment creation and consumer choice.

1.2 Previous Planning Application (app ref: PL/08840)

1.2.1 This application follows a previous planning application for the same development on the same site submitted to Carmarthenshire County Council under reference PL/08840. The previous application was refused under delegated powers in July 2026.

1.2.2 Lidl has carefully reviewed the reason for refusal together with the comments received during the determination of the previous application. Accordingly, the proposal has been refined to ensure that planning officers' original concerns with the proposal are fully addressed and to allow Carmarthenshire Council to consider the salient matters afresh.

1.3 Purpose of this Statement

1.3.1 The purpose of this Statement is to assess the proposed development against national and local planning policy and to demonstrate compliance with the relevant planning considerations relating to retail development.

1.4 Structure of the Statement

1.4.1 The remainder of this Statement is structured as follows:

- Section 2: Site Background and Context;
- Section 3: The Proposed Development;
- Section 4: Planning Policy Context;
- Section 5: Assessment of Existing Retail Provision and Sequential Assessment;

- Section 6: Assessment of Need;
- Section 7: Assessment of Impact;
- Section 8: Other Principal Planning Considerations; and
- Section 9: Summary and Conclusions.

CARNEYSWEENEY

SECTION 2

Site Background and Context

2.0 Site Background and Context

2.1 The Application Site and Surroundings

2.1.1 The application site is located at Cwmann, immediately south of the town of Lampeter and occupies a prominent position at the junction of the A482 and A485. The site extends to approximately 1.46 hectares and comprises a combination of previously developed land and agricultural land associated with the former Pen-y-bont Farm.

2.1.2 The site currently accommodates areas of hardstanding and informal parking associated with an existing mobile food takeaway. The site is bounded by the A482 to the east, the A485 to the west and south, and agricultural land and sporadic development to the north and west.

2.1.3 The site occupies a highly visible gateway location on one of the principal approaches into Lampeter and forms part of the transition between the settlements of Cwmann and Lampeter. The surrounding area is characterised by a diverse mix of land uses including residential development, commercial premises, community facilities, agricultural land and transport infrastructure.

2.1.4 Lampeter functions as an important service centre for a wide rural catchment, providing retail, educational, employment and community facilities for residents of the town and surrounding villages. The application site is well positioned to serve both Lampeter and Cwmann, together with the wider rural communities that regularly rely upon Lampeter for day-to-day shopping and service needs.

2.1.5 The River Teifi lies to the nort east of the site beyond the A482 corridor and the surrounding area benefits from an attractive landscape setting associated with the Teifi Valley. Notwithstanding this context, the site is contained by existing highway infrastructure and established patterns of development and does not form part of an isolated or undeveloped rural location.

2.1.6 The application site benefits from an established vehicular access and is strategically located in a position that is readily accessible to the local population. Its location at the junction of the A482 and A485 enables it to serve Cwmann and Lampeter and the wider catchment sustainably whilst remaining closely related to the existing built form of Cwmann.

2.2 Active Travel and Site Accessibility

2.2.1 The application site occupies a highly accessible location at the junction of the A482 and A485, immediately adjacent to the settlements of Cwmann and Lampeter. The site benefits from direct frontage to both highways, providing convenient access for pedestrians, cyclists, public transport users and private vehicles.

2.2.2 Existing pedestrian infrastructure provides connectivity between the site, Cwmann and Lampeter. Continuous footways are present along sections of both the A482 and A485, enabling safe and convenient access to surrounding residential areas, local services and community facilities. As such, the site is well related to the existing settlement pattern and is capable of being accessed on foot by a significant proportion of the local population.

2.2.3 Lampeter Town Centre, residential neighbourhoods, educational facilities and employment areas are located within walking and cycling distance of the site. The proposal will further encourage active travel through the provision of dedicated pedestrian routes, cycle parking and a site layout designed to facilitate safe and convenient access for non-car users.

2.2.4 The site also benefits from accessibility by public transport, with bus stops located in close proximity providing connections to Lampeter and surrounding settlements. This enables the site to be reached by a range of transport modes and reduces reliance on the private car for all journeys.

2.2.5 From a wider catchment perspective, the site's location on the A482 and A485 enables it to serve Lampeter and the surrounding rural communities efficiently. The site is positioned on established travel routes already used by residents for employment, education and shopping purposes, allowing many trips to be linked with existing journey patterns.

2.2.6 The site's accessibility credentials are further enhanced by its proximity to existing residential development and local services. In this regard, the proposal represents a sustainable location for retail development, providing convenient access to day-to-day shopping needs whilst supporting opportunities for walking, cycling and public transport use.

2.2.7 Overall, the application site is a highly accessible and sustainable location that is well connected to the communities it is intended to serve. The proposed development will make effective use of this accessible location and provide a foodstore that can be reached by a range of transport modes, consistent with national and local planning objectives relating to sustainable travel and accessibility.

2.3 Planning History

2.3.1 The application site benefits from an established planning history which demonstrates the long-standing acceptance of commercial and retail-related development at this location. Most notably, planning permission was granted in 2002 for the development of a service station incorporating retail floorspace and associated facilities. Whilst the development was not completed, the permission remains extant by virtue of material operations having been undertaken on site.

2.3.2 More recently, planning permission was granted by Carmarthenshire County Council in September 2023 for the redevelopment of part of the site to provide five trade counter units incorporating retail, business, industrial and storage and distribution uses. The approved development confirms the suitability of the site for commercial development and establishes a material fallback position in planning terms.

Planning Application PL/08840

2.3.3 In January 2025, Lidl Great Britain Limited submitted a planning application for the erection of a foodstore with associated access, parking, landscaping, drainage and ancillary works under planning application reference PL/08840. The application was supported by a comprehensive suite of technical assessments addressing matters including retail planning policy, highways, drainage, landscape and visual impact, ecology, flood risk and transport.

2.3.4 During the determination of the application, extensive consultation was undertaken with statutory consultees, technical officers, elected members and the wider public. The application addressed relevant matters including retail planning policy, highways, drainage, flood risk, landscape and visual effects, ecology, nutrient neutrality and transport.

2.3.5 During the determination of the previous application various technical matters were satisfactorily resolved through ongoing consultation which led to design refinement, agreed mitigation measures, and the in-principle acceptance of planning conditions.

2.3.6 Consultees who raised no objection to the proposed development subject to conditions included the Highway Authority, Mid and West Wales Fire and Rescue Service, Dŵr Cymru Welsh Water, Environmental Health and the Council's Landscape department.

2.3.7 The Highway Authority confirmed that the proposed development could be accommodated safely on the local highway network and recommended a series of planning conditions relating to the detailed implementation of the access arrangements, pedestrian facilities and associated highway works. No objection was raised on highway safety or highway capacity grounds.

2.3.8 Landscape and visual matters were reviewed in detail by the Council's Landscape Officer. Whilst acknowledging that landscape and visual effects would arise, the submitted Landscape and Visual Impact Assessment was accepted as an appropriate assessment of the likely effects of the proposal and it was concluded that the development was acceptable.

2.3.9 Drainage and surface water management matters were considered through both the planning application process and the separate Sustainable Drainage Approval Body ("SAB") process. Following the submission of additional technical information, SAB approval was secured and Carmarthenshire County Council subsequently confirmed that it had no drainage concerns relating to the site.

2.3.10 Subject to the agreement of a Construction Environmental Management Plan (CEMP) which was provided in its final iteration in March 2026 and incorporated enhanced ecological mitigation and construction management measures designed to safeguard the adjacent River Teifi SAC and associated habitats, we understand the proposals were considered acceptable from a biodiversity safeguarding and betterment perspective.

2.3.11 The current application is supported by a further updated suite of ecological documentation, including a Preliminary Ecological Appraisal, Construction Ecological Management Plan, Shadow Habitat Regulations Assessment, Nutrient Neutrality Assessment, Green Infrastructure Statement and Landscape and Ecological Design Scheme, all of which build upon and respond to the matters previously raised during the determination of application PL/08840.

2.3.12 In relation to flood risk, NRW accepted the hydraulic modelling and the broad conclusions of the Flood Consequences Assessment presented with the application and following further clarification regarding flood warning procedures, evacuation arrangements and the long-term management of the proposed flood storage void beneath the proposed store NRW did not object to the application.

2.3.13 The current application is accompanied by a draft updated Flood Consequences Assessment, Drainage and ecological and nutrient neutrality documentation which builds upon the assessment presented during the determination of application PL/08840.

2.3.14 In respect of retail planning matters application PL/08840 was supported by a Retail Impact Assessment (July 2025), Retail Impact Assessment Addendum (December 2025), and Supplemental Retail Analysis Note (February 2026).

2.3.15 The principal concern raised in relation to the previous application related to the detrimental consequences of the development for the vitality, viability and retail function of Lampeter Town Centre. It was solely on this basis the previous application was refused planning permission by officers under a delegated decision. No other technical matters formed the basis for withholding planning permission for the previous application.

2.3.16 The resubmission of the application allows the Council to consider the salient policy matters afresh.

Community Consultation and Engagement

2.3.17 Lidl has undertaken a comprehensive programme of public consultation and community engagement on the application proposals dating back to July 2024; providing residents, businesses and other elected stakeholders in both Carmarthenshire and Ceredigion administrative areas with an opportunity to review and comment upon the proposals. Lidl continue to engage with the local community throughout the determination process

2.3.18 The previous consultation exercise (app ref: PL/08840) generated a significant level of participation and demonstrated substantial support for the proposed development. A total of 1,755 responses were received, comprising 1,630 responses in support of the proposals, 102 responses in opposition and 23 respondents who indicated that they were unsure.

2.3.19 In addition, the Lidl's consultation records show that 590 formal expressions of support were received, compared with only four objections from local residents. Full support from Pencarreg Community Council was also recorded pursuant to application PL/08840.

2.3.20 The responses received highlight strong support for the provision of the LAD format foodstore locally, with respondents frequently citing the benefits of increased consumer choice, greater access to affordable food shopping, reduced travel distances, local job creation and investment within the local economy.

2.3.21 The significant level of support expressed through the consultation process and sustained over a longstanding period highlight a careful appreciation of the planning merits of the proposal when weighed against the assessed effects of the proposal in the planning balance.

2.3.22 The updated proposals remains substantially the same, albeit incorporating modest changes to the store design and minor consequential changes to the site layout.

CARNEYSWEENEY

SECTION 3

The Proposed Development

3.0 The Proposed Development

3.1 Description of the Development

3.1.1 Full planning permission is sought for the erection of a Lidl foodstore together with associated access, parking, landscaping, drainage and ancillary development on land at Pen-y-bont, Cwmann.

3.1.2 The proposed development has evolved through a detailed design process informed by site constraints, technical assessments and engagement undertaken during the preparation of both the previous and current planning applications.

3.1.3 Whilst the proposed development remains substantially the same in principle as the scheme previously submitted under application reference PL/08840, Lidl has carefully reviewed the matters raised during the determination of that application and has refined the proposal where appropriate.

3.1.4 The current scheme therefore reflects an iterative design approach which seeks to ensure the proposed development responds positively to its context whilst continuing to deliver the operational requirements necessary to support a modern discount foodstore.

3.1.5 The proposals are shown on the Proposed Site Layout Plan enclosed in Appendix A and comprise:

- A store of 2,184 sqm (GIA), with 1,347 sqm sales area (1,178sqm net sales[1]);
- 102no. car parking spaces, including 9no. parent and child, 8no. accessible parking bays and 2no. Electric Vehicle charging bays; and
- Associated drainage and landscaping.

Site Design and Appearance

3.1.6 The applicant has considered a range of development options to best respond to the constraints and opportunities of the site. The store will be built in accordance with Lidl's latest specification, providing a contemporary and sustainable design.

3.1.7 The proposed Lidl food store will deliver a contemporary, high-quality retail building that integrates with its surroundings. The store is positioned in the south-eastern part of the site, with customer parking to the north and west, ensuring convenient access and strong visual and physical connections.

3.1.8 Customer and staff access is proposed to be via a new access to the east from A482. Pedestrian and cycle access is provided from both the main vehicle entrances and from a further access point to the south along A482. Cycle parking is located near the store entrance.

[1] Exc. checkouts/circulation area

3.1.9 The building features a modern glazed frontage to create an active elevation and maximise natural light, complemented by a feature canopy that defines the main entrance and provides shelter. A mono-pitched roof reduces the perceived bulk of the structure and reinforces the entrance hierarchy. External finishes comprise durable white and grey cladding panels, selected for their contemporary appearance and ability to integrate with the local context.

3.1.10 The building is designed to be energy-efficient and meet Lidl's sustainability standards. Photovoltaic (PV) panels are included on the roof to provide zero-carbon energy. EV charging infrastructure is integrated into the car park.

3.1.11 Careful consideration has been given to the landscape structure, boundary treatments and green infrastructure strategy having regard to the site's prominent gateway location and its relationship with the surrounding landscape. The proposals incorporate a comprehensive landscape and ecological design scheme which seeks not only to integrate the development into its surroundings but also to enhance biodiversity, ecological connectivity and overall landscape quality. Extensive native tree and hedgerow planting is proposed throughout the site, together with species-rich planting areas, meadow grassland and a community orchard, creating a robust landscape framework that will mature over time and strengthen the site's relationship with the wider Teifi Valley landscape.

3.1.12 The landscape proposals have been designed to soften views of the development from surrounding roads and public viewpoints whilst reinforcing existing green infrastructure assets. New planting and habitat creation measures will strengthen ecological corridors, provide additional foraging and nesting opportunities for wildlife and contribute towards the long-term resilience of local ecosystems. Collectively, the proposals will deliver a substantial enhancement in habitat diversity when compared with the existing site and will provide measurable biodiversity benefits.

3.1.13 In addition to managing surface water runoff, the proposed attenuation pond, swales and associated SuDS features will create new wetland habitats and visual amenity features that contribute positively to both biodiversity and placemaking objectives.

3.1.14 The proposed green infrastructure strategy incorporates a range of biodiversity enhancement measures including native tree and hedgerow planting, pollinator-friendly species, habitat creation areas, bird and bat features and long-term ecological management arrangements.

3.1.15 Further details are provided within the accompanying Green Infrastructure Statement, Landscape and Ecological Design Scheme, Proposed Site Layout and Soft Landscaping Drawings, Arboricultural Assessment and Design and Access Statement.

Opening Hours

3.1.16 The typical opening hours for Lidl stores are 07:00-22:00 Monday to Saturday and Bank Holidays, and for six hours between 10:00-16:00 on Sundays. Given the context of the store, we do not envisage opening hours being a significant consideration for this application, nor something which needs to be controlled by condition.

Deliveries and Servicing

3.1.17 Servicing will be via a dedicated loading bay on the western elevation of the building. Mindful of minimising disturbance to any neighbouring landowners, each Lidl store typically has only up to 3 deliveries a day for all its products, including ambient, fresh, frozen and chilled goods. Total unloading time is generally only around 45 minutes. Waste/refuse is taken away by the delivery lorry on its return trip to the regional distribution centre.

3.1.18 Given the context of the store, we do not envisage servicing hours being a significant consideration for this application, nor something which needs to be controlled by condition.

Lidl's Operational Model

3.1.19 Lidl is now well established in the UK, with the Company operating in excess of 1000 stores from sites and premises both within and outside town centres. Its market share continues to increase substantially, and the Company is expanding its store network considerably. The UK operational model is based firmly on the success of Lidl's operations abroad, with more than 10,800 stores trading across Europe.

3.1.20 Lidl was characterised by the Competition Commission in its Groceries Market Investigation Final Report in 2008 as a Limited Assortment Discounter (LAD). The Commission said that LADs:

> *"carry a limited range of grocery products and base their retail offer on selling those products at very competitive prices. The three major LADs in the UK are Aldi, Lidl and Netto. Each … carries in the region of 1,000 to 1,400 product lines in stores ranging from 500m² to 1,400m² (stores of a similar size operated by a large grocery retailer generally carry about 5,000 products). Aldi, in large part, carries only its own label goods while both Lidl and Netto carry larger volumes of branded products".*

3.1.21 Whilst this report is over ten years old, its description of the LAD business model remains sound, albeit Netto no longer trades in the UK; the size of Lidl and Aldi stores has grown over time; and the number of product lines sold has increased. Nonetheless, the clear points of differentiation between the LAD operators, the main grocers (Tesco, Asda, Sainsbury's, Waitrose and Morrisons) and smaller convenience stores remain clear and readily identifiable, with the LAD operators selling limited ranges of staple products and catering predominantly for main food shopping needs.

3.1.22 The Commission, Inspectors and Secretary of State/Ministers have consistently recognised that LADs offer particular benefits of quality and value. Lidl sells a limited number of product lines, but all of its business practices are aimed at driving down costs so that it can provide exceptional value for money across the whole of its product range. Lidl typically sells up to 3,000 product lines, whereas the main grocers (Tesco, Asda, Sainsbury's & Morrison's) will sell in excess of 35,000 products. The number of value lines that the main grocer's stock is limited, whilst the whole of the LAD business model is geared to providing exceptional value.

3.1.23 Consumers no longer assume that the quality of goods sold by LAD operators must be low to achieve cheap prices. Indeed, Lidl can offer very competitive prices whilst keeping the quality of its goods extremely high and achieves this through a combination of:

- tremendous buying power as a result of the scale of its operations across Europe;
- a concentration on own brands (now about 80% of its product range) which avoids passing on the cost of brand name marketing to the consumer;
- its decision to stock a much more limited product range than others, concentrating on goods that form a very high proportion of the weekly food shopping needs of most households;
- operating systems that reduce operational costs; and
- simple product display and stock handling procedures.

3.1.24 The ability to offer a consistent range of high-quality goods at competitive prices enables Lidl to distinguish itself from other operators that may be perceived as operating similar business models. The whole of the Lidl product range delivers value, whereas the major grocers only stock own brand and 'value' lines amongst their branded and premium products. In the Grocer magazine's Gold Awards for 2025, Lidl were awarded Grocer of the Year.

3.1.25 Lidl does not stock convenience goods such as tobacco or individual confectionery items, and stocks limited pre-packed fish and meat and individual fruit and vegetable products. Lidl also does not provide services such as a post office, pharmacy, delicatessen, financial products or other in-house facilities. The result is that there is limited overlap with conventional supermarkets.

3.1.26 Lidl stores offer a limited range of non-food items, which typically occupy about 20% of the sales area. These items tend to be one-off specials offered based on 'when it's gone, it's gone', with the range changing on a weekly basis. There is no standard or constant comparison goods range offered in store, and the special items are wide ranging, including anything from sports equipment to electrical items.

3.1.27 On the issue of sustainability, backing British suppliers continues to be at the forefront of Lidl's plans, with total investment in British food and farming businesses to hit £17bn by 2025.

3.1.28 Since 2016, Lidl has reduced its food waste by almost half (43%). This means it is well on track to hit its 50% reduction target by 2030. Providing more meals to charities - including over 6 million in 2022, which surpasses the discounter's target - has helped reach this milestone. In 2022, Lidl also prevented nearly 9,000 tonnes of food waste through the sale of 1.7 million 'Too Good to Waste' boxes. Reducing other forms of waste has also been a key priority, and 95% of Lidl's own-brand packaging is now recyclable, reusable, renewable or refillable.

3.1.29 Overall, Lidl has cut the amount of plastic packaging across its own-brand ranges by 29% since 2017, with its sights set on achieving a 40% reduction by 2025. Through its partnership with Prevented Ocean Plastic, the discounter has also stopped the equivalent of 15 million plastic bottles from entering the ocean.

3.1.30 With over 90% of Lidl's carbon emissions coming from its supply chain and use of its products, Lidl is also working closely with suppliers on carbon reduction projects. The discounter has partnered with The Rivers Trust and is funding three water catchment projects (increasing to nine by 2025) to mitigate risks in the supply chain.

3.1.31 Meanwhile, as of February 2023, 45% of Lidl's British fruit and veg suppliers were LEAF Marque certified - a gold standard in sustainable farming - meaning they have robust water and nature conservation plans in place.

3.1.32 All of these measures support Lidl's sustainability goals and its commitment to helping customers in their day-to-day lives; that's why Lidl also led the way in pledging to halve the environmental impact of its customers' shopping baskets by 2030, through the WWF's Retailers' Commitment for Nature.

3.1.33 Principles of sustainability are ingrained in Lidl's operation from the efficient construction and standardised fit-out elements enabling rapid store construction, to energy saving measures including energy efficient building materials, low energy consumption lighting, motion detectors and automatic 'power down' lighting, electricity and heating in the evenings.

Employment

3.1.34 Staffing levels have yet to be finalised; however, based on existing Lidl stores elsewhere, the proposed store is likely to provide up to 40 jobs. Lidl always seek to employ locally and provide management opportunities for staff, the company's philosophy being to provide all their employees with opportunities for developing and progressing their careers with the company, with the longstanding corporate strategy being to promote from within the business.

3.3 Planning Benefits of the Development

3.3.1 The proposed development will deliver a range of significant planning benefits including:

- increased consumer choice within the food retail sector;
- enhanced competition and access to affordable food shopping;
- job creation during the construction and operational phases;
- inward investment into the local economy;
- expenditure retention within the local area;
- reduced need for residents to travel longer distances to access discount food retail provision; and
- improvements to local infrastructure, landscaping and accessibility.

3.3.2 These benefits attract substantial weight in favour of the development and should be considered alongside the detailed policy assessments contained within the remainder of this Statement.

3.4 Pre-Application Consultation and Engagement

3.4.1 Lidl has maintained a proactive approach to engagement throughout the evolution of the proposals and has sought to work positively with Carmarthenshire County Council, statutory consultees, elected members, local stakeholders and the wider community throughout the planning process.

3.4.2 Prior to the submission of planning application PL/08840, an extensive programme of community consultation was undertaken, including the distribution of consultation material to local properties, the provision of an online consultation platform and a public exhibition event held in Lampeter. The consultation exercise generated a significant level of public participation and community feedback.

3.4.3 Details of the consultation exercise and feedback received are set out within the Planning History section of this Statement and fully within the supporting Planning and Retail Statement for PL/08840. The consultation process demonstrated a strong level of local interest in the proposals and identified a range of matters requiring further consideration, including flood risk, traffic, retail need and the overall benefits of the development to the local area.

3.4.4 Following the refusal of application PL/08840, Lidl undertook a detailed review of the reason cited by officers, consultation responses and technical comments received throughout the application process.

3.4.5 The current application has been informed by this engagement to date and is supported by updated assessment. Additional work has been undertaken in relation to flood risk, drainage, ecology, nutrient neutrality, green infrastructure, landscape and transport matters, together with updates to the supporting planning and retail assessment.

SECTION 4

Planning Policy Context

4.0 Planning Policy Context

4.1 Overview

4.1.1 Section 38(6) of the Planning and Compulsory Purchase Act 2004 requires that planning applications be determined in accordance with the development plan unless material considerations indicate otherwise.

4.1.2 For the purposes of this site, the statutory development plan comprises:

- Future Wales – The National Plan 2040 (published February 2021); and
- Carmarthenshire Local Development Plan (LDP) (adopted December 2014).

4.2 Future Wales

4.2.1 Future Wales: The National Plan 2040 is the Welsh Government's highest tier of the development plan in Wales. Planning decisions at all levels must be made in accordance with the development plan as a whole.

4.2.2 Under Policy 1: Where Wales Will Grow, the Welsh Government supports sustainable growth across all parts of Wales. This is underpinned by a 'Town Centre First' approach, set out in Policy 6, which requires significant new retail and community facilities to be located within town and city centres. Developments of a 'significant' scale are broadly defined as those serving a town, city, or region-wide catchment. Planning authorities are encouraged to apply this approach to smaller-scale proposals, using a sequential test to identify the most appropriate location.

Other relevant policies

4.2.3 Policy 2: Shaping Urban Growth and Regeneration – Strategic Placemaking promotes the creation of sustainable places through the growth and regeneration of towns and cities. It encourages development that is well-integrated with green infrastructure, supports vibrant communities, and reflects placemaking principles. Planning authorities are expected to use Green Infrastructure Assessments to inform site selection and design, ensuring that development contributes positively to the character and functionality of urban areas.

4.2.4 Policy 9: Resilient Ecological Networks and Green Infrastructure – which emphasises enhancing ecosystems, biodiversity, and green infrastructure through nature-based solutions.

4.2.5 Policy 12: Regional Connectivity – which promotes improved connectivity in urban areas through active travel, sustainable transport, and public transport. Walking and cycling are encouraged in all new developments to reduce reliance on private vehicles.

4.3 Carmarthenshire Local Development Plan (LDP)

4.3.1 Carmarthenshire County Council adopted the Carmarthenshire Local Development Plan (LDP) in December 2014. The Plan seeks to deliver sustainable growth, support economic development, maintain vibrant communities and ensure that development is directed to appropriate and accessible locations.

4.3.2 The proposed development supports a number of the overarching objectives of the LDP by facilitating investment within the local economy, improving access to services and facilities, supporting employment creation and providing enhanced consumer choice for residents of Lampeter, Cwmann and the wider rural catchment.

Strategic Policy SP1: Sustainable Places and People

4.3.3 Strategic Policy SP1 establishes the overarching sustainable development principles that underpin the Development Plan. The policy seeks to promote developments that contribute towards the creation of sustainable and resilient communities through the provision of employment opportunities, access to services and facilities and economic investment.

4.3.4 The proposed development will provide a modern retail facility in an accessible location, reducing the need for residents to travel longer distances to access discount food retail provision and contributing towards the economic and social wellbeing of the local area.

Strategic Policy SP3: Strategic Sites and Growth

4.3.5 Strategic Policy SP3 seeks to direct growth towards sustainable settlements and locations capable of accommodating development in a manner that supports existing communities and infrastructure.

4.3.6 The application site occupies a highly accessible location immediately adjacent to Lampeter and Cwmann and is positioned to serve an established population base together with the wider rural catchment that relies upon Lampeter as a service centre. The proposal therefore aligns with the spatial objectives of the Development Plan by supporting access to services in a sustainable location.

Strategic Policy SP8: Retail

4.3.7 Strategic Policy SP8 seeks to maintain and enhance the vitality and viability of Carmarthenshire's retail hierarchy whilst supporting appropriate retail investment and growth.

4.3.8 The policy recognises the important role that retail development plays in supporting communities, economic activity and consumer choice. In assessing retail proposals, consideration is given to the scale, location and potential impacts of development upon established centres.

4.3.9 As demonstrated within the subsequent sections of this Statement, the proposed development will provide additional consumer choice and access to affordable food shopping without resulting in significant adverse effects on the vitality and viability of Lampeter Town Centre. Accordingly, the proposal is considered to accord with the objectives of Strategic Policy SP8.

Strategic Policy RT1: Retail Proposals

4.3.10 Policy RT1 provides the detailed framework for assessing retail development proposals and requires consideration of retail need, the sequential approach and retail impact. The accompanying retail evidence demonstrates that the proposal satisfies these requirements and accords with the objectives of Policy RT1.

Strategic Policy SP17: Infrastructure and Transport

4.3.11 Strategic Policy SP17 seeks to ensure that development is located and designed to maximise accessibility by sustainable modes of transport and to minimise unnecessary travel demand.

4.3.12 The application site benefits from established connections to the surrounding highway, pedestrian and public transport networks and is capable of being accessed by a range of transport modes. The development will further support active travel through the provision of pedestrian and cycle infrastructure within the site.

Policy GP1: Sustainability and High Quality Design

4.3.13 Policy GP1 seeks to ensure that development contributes positively towards sustainable development objectives and achieves a high standard of design.

4.3.14 The proposal will redevelop an underutilised site in a prominent gateway location, delivering a high-quality retail development together with associated landscaping, accessibility improvements and environmental enhancements.

Policy TR2: Active Travel

4.3.15 Policy TR2 seeks to encourage development that promotes walking, cycling and the use of public transport.

4.3.16 The application site is readily accessible from nearby residential areas and benefits from existing pedestrian and public transport connections. The proposal incorporates cycle parking and pedestrian infrastructure designed to encourage sustainable travel choices.

Environmental and Place-Making Policies

4.3.17 A range of environmental policies within the Development Plan seek to safeguard landscape character, biodiversity, environmental quality and natural resources. These include Policies EP1, EP2, EP3, EQ4 and EQ5.

4.3.18 The proposed development is accompanied by a comprehensive suite of technical assessments addressing matters including ecology, landscape and visual impact, drainage, transport, flood risk and environmental quality. These assessments demonstrate that the development can be accommodated without giving rise to unacceptable environmental effects and that the proposal accords with the relevant environmental objectives of the Development Plan.

4.4 Other Material Considerations

Carmarthenshire Second Revised Deposit Local Development Plan 2018-2033

4.4.1 The statutory Development Plan for the area remains the Carmarthenshire Local Development Plan 2006-2021, adopted in December 2014. However, the Council is progressing the Revised Carmarthenshire Local Development Plan 2018-2033, which has reached an advanced stage of preparation and has been subject to independent examination. Whilst the emerging Plan cannot yet attract full Development Plan weight, it is capable of attracting weight commensurate with its stage of preparation, the extent of unresolved objections and the degree of consistency with national planning policy.

Planning Policy Wales Edition 12 (February 2024)

4.4.2 PPW 12 sets out the land use planning policies of the Welsh Government and is supported by a series of Technical Advice Notes (TANs). In accordance with the Well-Being of Future Generations (Wales) Act 2015, the primary objective of PPW, as set out at Paragraph 1.2, is "to ensure that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales".

4.4.3 Key sections relevant to the proposals include:

4.4.4 **Previously Developed Land** - PPW 12 indicates that previously developed (also referred to as brownfield) land should, wherever possible, be used in preference to greenfield sites where it is suitable for development (paragraph 3.55) and one of the national sustainable placemaking outcomes involves prioritising the use of previously developed land and existing buildings.

4.4.5 **Placemaking** - PPW 12 sets out that, to maximise well-being and the creation of sustainable places, the concept of 'placemaking' should be at the heart of the planning system. Paragraph 2.8 advises that development proposals "must seek to promote sustainable development and support the well-being of people and communities across Wales. This can be done through maximising their contribution to the achievement of the seven wellbeing goals and by using the five Ways of Working, as required by the Well-being of Future Generations Act. This will include seeking to maximise the social, economic, environmental and cultural benefits, while considering potential impacts when assessing proposals and policies in line with the Act's Sustainable Development Principle." Paragraph 2.9 goes on to clarify that "The most appropriate way to implement these requirements through the planning system is to adopt a placemaking approach to plan making, planning policy and decision making."

4.4.6 **Needs Test** – PPW 12 advises that when determining planning applications for retail uses, planning authorities should first consider whether there is a need for additional retail provision (para. 4.3.14). Paragraph 4.3.15 goes on to explain that need may be quantitative, to address a quantifiable unmet demand for the provision concerned, or qualitative. Precedence should be given to establishing quantitative need before qualitative need is considered for both convenience and comparison floorspace.

4.4.7 **The Sequential Test** - PPW 12 indicates Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. It highlights that "the sequential approach applies to retail and all other uses complementary to retail and commercial centres." Paragraph 4.3.18 clarifies that by adopting a sequential approach first preference should be to locate new development within a retail and commercial centre defined in the development plan hierarchy of centres.

4.4.8 **Retail Impact Assessment** - Paragraph 4.3.26 advises that all retail planning applications or retail site allocations of 2,500 sq. m or more gross floorspace that are proposed on the edge of, or outside, designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment.

4.4.9 **New Out-of-Centre Developments** - Paragraph 4.3.20 states that "New out-of-centre retail developments or extensions to existing out-of-centre developments should not be of a scale, type or location likely to undermine the vibrancy, attractiveness and viability of those retail and commercial centres that would otherwise serve the community and should not be allowed if they would be likely to put development plan retail strategy at risk".

4.4.10 **Economy & Jobs** - Section 5 of PPW 12 recognises the role that retailing plays in supporting the economy. Paragraph 5.4.1 states that "For planning purposes the Welsh Government defines economic development as the development of land and buildings for activities that generate sustainable long-term prosperity, jobs and incomes. Paragraph 5.4.2 goes on to confirm that "Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism, and public services."

4.4.11 **Healthy Lifestyles** – Promoting healthier places forms a key Well-Being Goal set out in PPW 12. Paragraph 3.22 states LPA's "…should develop and maintain places that support healthy, active lifestyles." Paragraph 3.20 highlights "Disadvantaged and deprived communities tend to be disproportionately affected by health problems."

4.4.12 **Accessibility** - PPW 12 sets out that the planning system has a key role to play in reducing the need to travel and supporting sustainable transport, by facilitating developments which for example: "are sited in the right locations, where they can be easily accessed by sustainable modes of travel and without the need for a car" (Paragraph 4.1.10). Paragraph 4.1.32 continues to indicate that: "Planning authorities must ensure new housing, jobs, shopping, leisure and services are highly accessible by walking and cycling."

4.4.13 **Green Infrastructure (GI)** - PPW 12 explains that GI plays a fundamental role in shaping places and our sense of well-being, and is intrinsic to the quality of the spaces we live, work and play in. Paragraph 6.2.4 advises that the planning system must maximise its contribution to the protection and provision of green infrastructure assets and networks as part of meeting society's wider social and economic objectives and the needs of local communities. PPW further advises that a green infrastructure statement should be submitted with all planning applications and that this will be proportionate to the scale and nature of the development proposed describing how green infrastructure has been incorporated into the proposal. In the case of minor development this will be a short description and should not be an onerous requirement for applicants. The green infrastructure statement will be an effective way of demonstrating positive multi-functional outcomes which are appropriate to the site in question.

Technical Advice Notes

4.4.14 **Technical Advice Note 4: Retail and Commercial Development (TAN4) (2016)** - TAN4 reflects the 'town centre first' approach set out by PPW 12. TAN4 explains that retail developments should be assessed against a range or impact criteria (paragraph 8.3).

4.4.15 **Technical Advice Note 18: Transport (TAN18) (2016)** - explores the transport aspect of planning developments and in terms of this application, it is important to take note that "maximum parking standards should not be applied so rigidly that they become minimum standards. Maximum standards should allow developers the discretion to reduce parking levels" (paragraph 4.13).

4.4.16 **Technical Advice Note 23: Economic Development (TAN23) (2014)** - explores the benefits of economic growth and defines economic development as development that generates wealth. It is important that LPAs recognise the need to "guide economic development to the most appropriate locations, rather than prevent or discourage such development" (paragraph 1.2.5).

SECTION 5

Assessment of Existing Retail Provision

5.0 Assessment of Existing Provision

5.1 Introduction

5.1.1 This section provides a summary assessment of existing retail provision. It is noteworthy, detailed assessment of existing provision was undertaken and submitted in support of planning application PL/08840; the findings are documented and considered in the Retail Impact Assessment (July 2025), Retail Impact Assessment Addendum (December 2025), and Supplemental Retail Analysis Note (February 2026).

5.1.2 We reconsider the findings of the assessment below.

5.2 Primary Catchment Area (PCA)

5.2.1 The PCA is the area in which the proposed development is anticipated to draw the majority of its trade. The extent of the PCA varies according to factors such as:

- the nature of the settlement involved (PCAs for market towns in predominantly rural areas would generally be wider than those within or in close proximity to the built-up areas of larger towns or cities);
- the density of residential development in the vicinity of the site;
- the prominence and accessibility of the proposed development in relation to the main road network and to public transport provision; and
- the location of the development in relation to established competition.

5.2.2 In formulating the PCA careful regard is given to the shopping patterns identified in the household survey which underpins the assessment. Having regard to the largely rural locale and location of existing facilities, in particular Limited Assortment Discounters (LADs), the PCA is considered to broadly comprise an area of up to a c. 20-minute drive time (off peak) from the application site.

5.2.3 Inevitably some trade is likely to be drawn from outside the PCA. However, this is only likely to form a very small proportion of the overall turnover of the development. The extent of the PCA is shown on the plan attached at **Appendix B**.

5.3 Designated Centres

5.3.1 The focus of the assessment of existing provision has been on the following PCA based centres.

- Lampeter Town Centre
- Llanybydder District Centre
- Tregaron Urban Service Centre

5.3.2 In accordance with PPW 12 and TAN4, a health-check assessment has been conducted of each of the centres, having regard to accepted vitality and viability indicators.

5.4 Lampeter Town Centre

5.4.1 Lampeter Town Centre is located c.650m north from the application site. Lampeter is a university market town that lies at the administrative boundary of Ceredigion and Carmarthenshire authority areas. The town centre has a mix of services and independent shops and is a popular tourist destination. It hosts a regular farmer's market and is served by a leisure centre and swimming pool and a local museum. University of Wales Trinity St David Lampeter Campus lies in close proximity off College Street.

Diversity of Uses

5.4.2 CarneySweeney has investigated the composition of the town centre based on the extent of the centre outlined in the Experian GOAD plan. A GOAD plan of Lampeter Town Centre is shown at **Appendix C** for reference. The retail centre boundary of the GOAD plan is different to Lampeter's retail centre boundary of the Ceredigion's Local Development Plan (2013). The GOAD plan covers a slightly wider area and is considered for this assessment.

5.4.3 The composition of units within Lampeter is set out in the table below. The figure provides a comparative view of different services within the centre against the UK average.

Table 4.1 Lampeter Centre – Composition of Uses

Sector	GOAD Survey March 2024		CS Survey August 2024		UK Average 2025 %
	No. of Units	%	No. of Units	%	
Convenience	9	7.03	10	7.81	9.3
Comparison	38	29.69	38	29.69	26.1
Retail Services	21	16.41	20	15.62	15.8
Leisure Services	27	21.09	29	22.66	26.5
Financial & Business	13	10.16	13	10.16	7.9
Vacant	20	15.63	18	14.06	14.1
Total	**128**	**100**	**128**	**100**	**100**

5.4.4 Lampeter Town Centre shows a healthy mix of cafes, restaurants and grocers with a presence of well-known convenience shops including Co-op and Sainsburys and also independent retail shops and bakeries. The highest represented category in the centre is comparison services (29.69%), which is higher than the UK average of 26.30%. Retail and financial and business services are also higher than the UK average.

5.4.5 Although convenience and leisure services are below the UK average, albeit this is not to be a concern, and the centre overall offers a strong range of different services.

Vacancies

5.4.6 In March 2024, there were twenty identified vacant units and in August 2024 this had reduced to eighteen units. The vacancy rate at 14.06% in August 2024 shows a slightly lower rate than the UK average of 14.11%, which is within expected levels.

Accessibility

5.4.7 The town centre is easily accessible by both public and private transport. The centre is well located and can be accessed from A482 and A475.

5.4.8 The centre is not served by a train station. However, the centre is served by various bus services along the A482 and A475 providing services to surrounding neighbourhoods and wider areas including Tregaron, Aberystwyth and Carmarthen.

5.4.9 Most of the pavements throughout the centre are well maintained and have sufficient space for less abled users. There is no dedicated cycle lanes identified during the site visit; however, the centre is served by cycle stands at the main supermarkets, Co-op and Sainsbury's.

Pedestrian Flows

5.4.10 In respect of pedestrian activity levels, the busiest observed areas are at the public area, by the monument adjacent to the HSBC, and Sainsbury's. The west of the centre on A475 was observed to have a low footfall level.

5.4.11 Notwithstanding this, the town centre demonstrated good levels of activity, and the centre was perceived to be busy with good levels of activity throughout the day.

Perception of Safety

5.4.12 Throughout the site visit, Lampeter town centre felt safe. Public areas are monitored by CCTV cameras. In terms of lighting, the centre appears to be well furnished with street lighting to help provide a safe environment at night.

Environmental Quality

5.4.13 The retail centre is generally tidy and well maintained. It is served by street furniture around the centre, which creates a welcoming environment. Hanging baskets were present throughout the retail centre at the frontage of the retail shops, which lifts the overall quality and amenity of the public realm. There are no major litter or graffiti issues observed in the town centre. Overall, the centre's environmental quality is considered to be high.

5.5 Llanybydder Centre

5.5.1 Llanybydder District Centre is located c.6.8km southwest from the application site. Llanybydder is a small market town located on the A485 that connects the town with Carmarthen. The centre is focused along Heol Caerfyrddin and Heol Llanbedr and provides sufficient services and facilities to the surrounding residential population.

Diversity Of Uses

5.5.2 The composition of units within Llanybydder District Centre is set out in the table below.

Table 4.2 Llanybydder Centre – Composition of Uses

Sector	August 2024		UK Average 2025 %
	No. of Units	%	
Convenience	1	14.29	9.3
Comparison	0	0	26.1
Retail Services	2	28.57	15.8
Leisure Services	3	42.86	26.5
Financial & Business	0	0	7.9
Vacant	1	14.29	14.1
Total	**7**	**100**	**100**

5.5.3 The centre totals seven units and has a strong presence of leisure services. The only convenience service within the district centre is the Nisa store and it is sufficient to provide a day-to-day shopping service to Llanybydder.

Vacancies

5.5.4 There is one vacant unit within Llanybydder District Centre. The centre's vacancy rate is within expected levels for a centre of such a small scale.

Accessibility

5.5.5 The district centre is easily accessible by private transport. The A485 and B4337 directly serves the centre. The district centre can also be accessed by public transport, as Llanybydder War Memorial and Cross Hands Hotel bus stops provides bus services to surrounding residential areas and wider areas including Carmarthen and Lampeter.

Pedestrian Flows

5.5.6 The observed pedestrian activity was low during the site visit undertaken in the morning. However, observations indicate that the Empire Garage vehicle repair shop lies at the south of the district centre and generates higher footfall compared to other outlets.

Perception of safety

5.5.7 Throughout the site visit, the district centre felt safe. The centre is served by CCTV monitoring cameras and there appears to be adequate street lighting for safety at night.

Environmental Quality

5.5.8 The retail centre is generally tidy and well maintained. There were hanging baskets on the Cross Hands Hotel building and benches were present outside the Hotel which lifts the overall quality and amenity of the public realm. There were no clear litter or graffiti issues in the district centre.

5.6 Tregaron Centre

Tregaron is an ancient market town and is located c.15.6km northeast from the application site. Tregaron is defined as an Urban Service Centre within Ceredigion County Council. The retail centre provides a strong leisure service within the retail centre.

Diversity Of Uses

5.6.1 The composition units within Tregaron Urban Service Centre are set out in the table below.

Table 4.3 Tregaron Centre – Composition of Uses

Sector	Units – August 2024		UK Average 2025 %
	No.	%	
Convenience	4	13.80	9.3
Comparison	5	17.24	26.1
Retail Services	6	20.69	15.8
Leisure Services	8	27.59	26.5
Financial & Business	3	10.34	7.9
Vacant	3	10.34	14.1
Total	**29**	**100**	**100**

5.6.2 The centre totals 29 units and the highest represented category in the centre is leisure services (27.59%), which is higher than the UK average of 25.79%. The main convenience service within the centre is the Spar which provides the essentials for the local area.

Vacancies

5.6.3 The centre displays three vacant units, which equates to 10.34%, below the national average of 14.11%. This suggests that the centre is healthy, and the low vacancy rate tends to indicate a good demand for unit space.

Accessibility

5.6.4 The centre is mainly accessible by private transport. The centre is well located and can be accessed from A485 and B4343. The A485 connects to Lampeter, and it also connects to A487 which leads to Aberystwyth. The centre is primarily served by one Pay and Display Public Car Park. There are also free on-street parking scattered across the centre.

5.6.5 There are bus services, however these are infrequent services to surrounding neighbourhoods and wider areas including Lampeter and Aberystwyth.

Pedestrian Flows

5.6.6 The observed pedestrian flow was moderately low during the site visit and the busiest area of the centre was observed to be at the north of the retail centre close to the Spar. Lower levels of footfall were observed at Chapel Street, potentially due to the services provided in the area.

Perception of safety

5.6.7 Throughout the site visit, Tregaron felt safe. The centre is well served by street lighting and CCTV.

Environmental Quality

5.6.8 Generally, shopfronts and building facades are well maintained throughout the centre. The quality of the central area of Tregaron is generally good. A number of public benches and soft landscaping features including planters were present which helps to lift the environmental quality. There are also picnic benches placed outside of Y Talbot which creates a welcoming environment. There were also little to no litter or graffiti in the centre.

5.7 Summary and conclusions

5.7.1 In summary, all of the three centres appear to be in good health, are easily accessible via private transport and are perceived to be safe, well maintained shopping environments with benches / picnic benches present in all three centres. All of the three retail centres display a lower vacancy rate compared to the UK average, which is an indication of vitality and viability. The centres are vital and viable in servicing their respective local / neighbourhood functions

5.7.2 During the determination of application PL/08840, neither the LPA nor its independent retail advisors (Nexus) raised any substantive objections to the methodology, findings or conclusions of the Town Centre Health Check. Notably, Nexus confirmed, based on the RIA, the South West Wales Regional Retail Study (SWWRS) and its own assessment, that there is no evidence to suggest that Lampeter town centre is failing. The centre is identified as healthy and diverse and is well placed to absorb changes in shopping patterns, including any reduction in linked trips, which would, in part, be offset by linked trips associated with the proposed development.

5.7.3 We consider the findings of the assessment of existing retail provision continue to provide a robust evidence base upon which to conclude on retail matters.

5.7.4 The principal conclusions of the assessment remain that:

- Lampeter performs an important retail and service function for a wide rural catchment;
- The town centre accommodates a diverse mix of retail, commercial, community and service uses;
- There remains an absence of a local LAD food retail format offer available accessibly;
- The centre continues to attract regular footfall and activity throughout the day;
- Vacancy levels are not indicative of a centre experiencing significant decline; and
- The centre is vital and viable and capable of accommodating future investment and growth.

5.7.5 Additionally, the assessment concludes that both Llanybydder District Centre and Tregaron Urban Service Centre continue to perform important local shopping and service functions for their respective catchments. Neither centre exhibit characteristics indicative of undue decline, and both remain viable and attractive centres serving their local communities.

SECTION 6

The Need for the Proposed Development

6.0 The Need for the Proposed Development

6.1 Introduction

6.1.1 This section assesses the retail 'need' for the proposed development in accordance with Planning Policy Wales Edition 12 (PPW 12), Technical Advice Note 4: Retail and Commercial Development (TAN 4) and the adopted Carmarthenshire Local Development Plan (LDP).

6.1.2 The Welsh Government does not prescribe any particular methodology for undertaking need assessments; it is for each local planning authority to be satisfied that quantitative retail need evidence has been prepared in a clear, logical and transparent way using robust and realistic evidence (paragraph 6.3, TAN 4). There are two acknowledged indicators of need: quantitative need – a statistical assessment of capacity for additional floorspace; and qualitative need – an assessment of other, non-numerical considerations, which can include addressing overtrading, improving accessibility, widening choice and the redistribution of trade.

6.1.3 Whilst PPW 12 apportions an element of precedence to quantitative need, it is clear that qualitative need and other factors are material considerations, with the weight to be afforded being a matter for the decision-maker in each case. As set out below, both quantitative and qualitative need for the proposed development is demonstrated.

6.1.4 Need for the proposed development is considered in detail the Retail Impact Assessment (July 2025), Retail Impact Assessment Addendum (December 2025), and Supplemental Retail Analysis Note (February 2026) submitted pursuant to PL/08840.

6.1.5 It is material to note that, during previous application ref: PL/08840 and following further analysis provided by CarneySweeney, the Council's retail advisor, Nexus, revised its position on need. Having initially advised (October 2025) that a quantitative need had not been demonstrated, Nexus updated its advice (May 2026), in light of the additional assessment, that there is potential quantitative need for the proposed foodstore and that in respect of qualitative (non-numerical) needs, the proposal gives rise to qualitative benefits. The salient matters are reconsidered below.

6.2 Quantitative need

Approach and evidence base

6.2.1 The quantitative assessment focuses on the Primary Catchment Area (PCA) – Zone 1, centred on Lampeter and Cwmann – which is the area from which the majority of the store's trade will be drawn and the extent of which Nexus accepts as reasonable. The assessment draws on an independent household survey of shopping patterns undertaken by NEMS in May 2025 (the scope of which was the subject of consultation with the Council), together with population and per-capita expenditure data and growth forecasts from Experian (Retail Planner Briefing Note series), and published convenience goods sales densities from GlobalData 2025 (at a 2023 price base). The full updated statistical tables are provided at Appendix C.

Shopping patterns across the study area

6.2.2 In response to the request to demonstrate shopping patterns beyond the PCA at application PL/08840, the position across all five study area zones confirms that convenience expenditure retention is weak across the study area and that substantial expenditure is being lost to higher-order destinations, principally in Aberystwyth and Carmarthen.

6.2.3 The PCA retains c.75% of convenience expenditure, of which the Sainsbury's store in Lampeter alone accounts for around half; this confirms there is a single dominant local store and a lack of local choice. There is currently no limited assortment discount operator available locally. Around £8m of PCA expenditure is lost beyond the catchment; this is broadly equivalent to the convenience turnover of the proposed store. Of the 'leaked' PCA trade, c.3.6m flows to Limited Assortment Discounter (LAD) stores – the Aldi at Stephens Way and Lidl at Friars Park in Carmarthen, and the Lidl at Rheidol Retail Park in Aberystwyth – the very format proposed here and unavailable locally.

6.2.4 Across the wider study area, market share retention falls with around £48m lost to Aberystwyth and Carmarthen destinations, c.30% of which is captured by Aldi and Lidl. The Drive Time Plan at **Appendix B** illustrates the extent of this gap in provision: the nearest LAD stores are up to a c.50-minute drive (a c.45-mile round trip) from Cwmann and Lampeter.

Existing store trading performance

6.2.5 The trading performance of existing PCA convenience provision has been assessed against company benchmark turnover levels, derived from published sales densities (GlobalData 2025, 2023 prices). In short, it confirms that the Co-op at Bridge Street, Lampeter is trading broadly at a company benchmark level, whilst the Sainsbury's at Market Street is trading substantially above company benchmark. The remaining PCA provision comprises small, specialist units with no discernible main-food market penetration and little 'trading overlap' with the proposed store.

6.2.6 The scale of 'overtrading' at Sainsbury's exceeds the convenience turnover of the proposed store. This is compelling quantitative evidence of the quantum of expenditure capacity available to support a new discount operator locally; the dearth of local choice and competition; and the existing latent need for improved local competition. It also demonstrates the trading strength of Lampeter's principal foodstore; it is demonstrably well equipped to absorb the trading effects of the proposal (this is considered further in Section 8.0 below).

PCA convenience goods capacity

6.2.7 The quantitative assessment sets the available convenience expenditure in the PCA against the benchmark turnover of existing PCA stores, and against their survey-derived turnover, to establish the balance between demand and supply at the design year of the proposed store.

This benchmark-based approach directly addresses the methodology recommended by the Council's advisor, Nexus, during application PL/08840.

6.2.8 The proposed store has a benchmark convenience turnover which is lower than previously assessed[2]. Measured against PCA available expenditure alone, there is expenditure capacity which demonstrates quantitative capacity. A modest allowance for 'inflow' (non-resident spend i.e. visitors and tourists) from which Lampeter benefits further demonstrates there is sufficient expenditure headroom to sustain the proposed store.

6.2.9 Converting the surplus expenditure capacity to floorspace at the proposed store's benchmark sales density shows convenience floorspace capacity in the PCA in 2030 of between c.797 sqm net (excluding inflow, on available expenditure) and c.2,220 sqm net (including inflow, on turnover). On the turnover-based scenarios the capacity is c.1,510 sqm net excluding inflow – comfortably in excess of the 942 sqm net convenience floorspace proposed. In the same manner as demonstrated at app ref: PL/08840 quantitative capacity or need is demonstrated.

Effect of the proposal on market share retention

6.2.9.1 A zonal trade-draw assessment shows the store drawing c.63% of its trade from the PCA and c.37% from Zones 2–5. Given that the proposal delivers a materially different retail format to the catchment, an uplift in market share retention through clawback is realistic and eminently achievable, and it counteracts unsustainable expenditure leakage in accordance with the Welsh Government's placemaking and sustainability objectives.

Extant planning permission and fall-back position

6.2.9.2 It must also be recalled that the application site benefits from an extant full planning permission (ref. PL/05898) for retail (Class A1) and other commercial uses, in addition to earlier permissions for a service station and neighbourhood convenience store. The ability to bring forward retail development on the site without further permission represents a fall-back position and this is a material consideration.

6.3 Conclusion on quantitative need

6.3.1 The evidence demonstrates significant convenience expenditure capacity in the PCA, whether measured against available expenditure or existing turnover, that is sufficient to support the convenience turnover of the proposed store in full. Consistent with this, the Council's advisor Nexus, accepts that there is potential quantitative need for the proposed foodstore. Quantitative need for the proposed development is demonstrated.

[2] The store's net sales area excludes non trading space inc, tills and circulation area

6.4 Qualitative Need

6.4.1 Qualitative need is a significant material consideration. PPW 12 and TAN 4 recognise that qualitative need may include addressing operational deficiencies and overtrading, improving accessibility, widening choice, and counteracting unsustainable shopping patterns. The proposal delivers clear qualitative benefits under each of these headings.

Meeting local consumer need and improving choice

6.4.2 Neither Cwmann nor Lampeter is currently served by a Limited Assortment Discounter. LAD retailers fulfil a distinct role, different to the mainstream supermarkets, offering particular benefits of price and value that are recognised by the Competition Commission, Planning Inspectors and the Secretary of State. Lidl does not stock tobacco or individual confectionery, stocks only limited pre-packed fish and meat and has no in-store counters or concessions; overlap with town-centre operators is therefore typically limited.

6.4.3 The Council's own evidence base supports a qualitative need. The Carmarthenshire Retail Study Update (January 2023) identifies the most obvious deficiencies in foodstore provision as the rural areas in the north, west and north-east of the County (Zones 4, 5 and 6). The application site lies in Zone 5, at the far north of the County, where Lampeter – immediately across the authority boundary – performs an important role in serving the rural north of Carmarthenshire.

6.4.4 The household survey confirms strong local demand: 50% of all respondents, rising to c.65% in the PCA, consider there is a need for a new discount food supermarket in the Lampeter/Cwmann area[3]. This is reinforced by the representation from Pencarreg Community Council at app ref: PL/08440, whose Councillors record that they support the project, citing the loss of local shops, the need for a competitively priced retailer, job creation and the travel time and cost currently incurred reaching the nearest LAD stores c.20–30 miles away.

6.4.5 The applicant's pre-application consultation (app ref: PL/08440) demonstrated overwhelming local support, and comparable qualitative benefits were advanced by local members and supporters at the determination of the previous Aldi proposal in Lampeter – including reduced out-commuting for food shopping, improved affordability, accessibility for less-abled residents, local employment and reduced air pollution. Basket-shop analysis shows Lidl offers materially better value than existing local provision.

Counteracting unsustainable shopping patterns

6.4.6 The most sustainable way to shop is to shop where you live – a principle well established in PPW and TAN 4 and promoted in Future Wales. There is clear, empirical evidence of PCA residents making lengthy round trips to LAD and larger stores in Aberystwyth and Carmarthen;

[3] Question 24

as the Council's advisor, Nexus, accepts; this is itself a sign of local consumer need to which positive weight should be given. The proposal would claw back a meaningful proportion of this leaked expenditure and reduce the need to travel.

6.4.7 A Mileage Change Technical Note (Appendix D) quantifies this benefit, evidencing a net saving of between 34,000 and 44,000 vehicle miles per year across the local highway network. Applying published emissions factors, this equates to a saving of approximately 9.2 to 11.9 tonnes of CO_2e per year.

6.4.8 This is a highly material benefit in local policy terms. Carmarthenshire County Council declared a climate emergency in February 2019, committing to become a net-zero carbon authority by 2030, and was the first authority in Wales to publish a comprehensive net-zero Carbon Action Plan (February 2020). The LDP promotes the location of development to reduce the distances driven by private car (paragraph 5.3.5), Policy SP2 seeks to minimise the need to travel by private motor car, and Policy EP2 seeks to minimise pollution. The reduced mileage and associated CO_2 savings accord directly with these objectives.

6.4.9 The site is highly accessible by non-car modes. The built-up areas of Cwmann and Lampeter lie within a c.1-mile (c.10–15 minute) walk along the flat, legible and adopted A482, which performs well against recognised walkability criteria; a pedestrian crossing and bus stop/pull-in improvements are proposed. The Highways department raised no objection on active travel or accessibility grounds to previous app: PL/08440.

Employment and economic benefits

6.4.10 The store will generate up to 40 jobs, with the aim of employing c.80% locally, plus indirect construction, distribution and supply-chain roles. Lidl pays an industry-leading wage and was the first UK supermarket to pay the Living Wage. This is a meaningful economic benefit in a rural area where unemployment persists, and it regenerates a long-vacant, committed retail site.

6.4.11 It is noted that in providing a reason for refusing PL/08440 the economic benefits of the proposal including trip reduction, climate benefits, job creation, investment and increased retail choice etc were not considered by officers to outweigh perceived retail and town centre planning policy conflict, and likely harmful impact on the role and function of Lampeter centre. This is in spite of officers accepting there is demonstrable quantitative need, but with what was considered heavy reliance upon the trading performance of a Lampeter's principal existing store, Sainsbury's. A very strong trading performance which, it should be stated, we consider is evidence and reflective of a material absence of local choice and competition. And qualitative need being demonstrated (albeit this was considered by officers to be not "strong" need).

6.6 Conclusions on need

6.6.1 In respect of app ref: PL/08440 we consider officers erred in the weighing up of important material considerations of need in the planning balance.

6.6.2 In respect of TAN 4's need considerations, quantitative need is demonstrated and established in accordance with PPW 12, TAN 4 and Policy SP8 of the LDP (and emerging RLDP Policy SP2). This is accepted by the Council and its retail advisors in the determining of app ref: PL/08440. The development will address overtrading, improve accessibility, widen local choice, reduce unnecessary travel and redistribute trade. There is a clear quantitative and qualitative need for improved local provision in the north of the County, corroborated by the Council's own retail evidence, by local representations and by the household survey and assessment submitted with the application. Qualitative need for the proposed development is demonstrated, and full weight should be given to this in decision making.

SECTION 7

The Sequential Approach

7.0 The Sequential Approach

7.1 Introduction

7.1.1 The sequential approach is set out at paragraphs 4.3.18 to 4.3.24 of PPW 12. It requires that all potential suitable and available town-centre options, and then edge-of-centre options, are thoroughly assessed before out-of-centre sites are considered for main town-centre uses. The approach requires pragmatism and flexibility from all parties, and the onus of proof that more central sites have been thoroughly assessed rests with the developer. The key considerations for each site are the likelihood of availability within a reasonable period, suitability for the proposed development, and viability.

7.1.2 This section is unchanged in its conclusions from the position tested by the Council's retail planning advisor at application PL/08840, which concludes that the proposal meets the sequential test. This Section is updated and summarised here for completeness and reflects current judicial authority.

7.2 Status of the Application Site

7.2.1 The application site is a committed retail development site, benefiting from an extant permission (ref. PL/05898) that includes Class A1 retail use. The ability to build retail development on the site without further permission represents a strong fall-back position and is a material consideration. Notwithstanding this, the site lies in an out-of-centre location and the sequential test therefore applies.

7.2.2 The conclusions of the Sequential Assessment were considered in detail during the determination of application PL/08840 by both the LPA and its independent retail advisors.

7.3 Application of the Sequential Approach

7.3.1 The assessment is consistent with PPW, TAN 4 and prevailing judicial authority. In carrying out the sequential test, flexibility is demonstrated as to format and scale, but suitability is judged against the development proposed by the applicant rather than some lesser scheme that the authority might substitute for it (Tesco Stores v Dundee City Council [2012] UKSC 13). The whole exercise is directed to what the developer is proposing and is "for use in the real world in which developers wish to operate" (Dundee, paras 24, 28 and 38).

7.3.2 Neither PPW nor TAN 4 requires disaggregation of the scheme across multiple sites; the disaggregation wording previously in PPW was removed and Welsh policy is consistent with England and recent case law in this respect (see also Rushden Lakes and Scotch Corner). The identity and legitimate commercial objectives of the applicant may be relevant to suitability (Aldergate Properties v Mansfield DC [2016] EWHC 1670; Telford Forge), such that it is reasonable to apply the test on the basis that the broad type of development is a LAD foodstore, for which there is only limited scope for flexibility in format.

7.3.3 On availability, the Court of Appeal has confirmed that potential sequential sites committed to other operators are not "available" for the purposes of the test, and that "available" is an ordinary word not used in any technical way (R (Tesco Stores Ltd) v Stockport MBC and Lidl Great Britain Ltd [2025] EWCA Civ 610). As the proposal could be implemented immediately on grant of permission, a site must be available within a comparable timeframe to be sequentially preferable. Significantly the conclusion that no suitable, available and viable sequentially preferable site exists was not disputed during the consideration of the previous application (PL/08840).

7.4 Site Search Parameters

7.4.1 Delivering the LAD operational model constrains the design and layout of the store. The Secretary of State and Inspectors have repeatedly accepted that there are inherent characteristics of the business model that limit flexibility – a store of a size to accommodate all functions, a high proportion of sales to storage space, and efficient movement of palleted goods – and that the model cannot function without surface-level car parking. The physical requirements taken to define the development are:

- a minimum site size of c.0.6ha;
- a minimum net floorspace of c.1,672 sqm on a single level (there is no prospect of disaggregation);
- approximately 100 adjacent surface-level car parking spaces;
- safe manoeuvring for customer and delivery vehicles, and a dedicated rear service area able to accommodate HGVs; and
- a prominent site able to attract passing trade.

7.4.2 Any sequential site must be available, or expected to become available, within a reasonable period. Given the proposal could be implemented immediately, anything beyond three months is not considered a reasonable period in this instance.

7.5 Sequential Site Search

7.5.1 The search, informed by site visits and a review of adopted development plan policy and available town-centre and edge-of-centre sites, focuses on Lampeter Town Centre, Llanybydder District Centre and Tregaron Urban Service Centre, together with their edge-of-centre locations.

7.7 Assessment of Alternative Sites

Lampeter Town Centre

7.7.1 Lampeter Town Centre lies c.650m north of the site and is defined on the Ceredigion LDP Proposals Map. It is small, densely developed and physically constrained, which increases the challenge of identifying sequentially preferable alternatives. The following sites were assessed:

- Site 1 – Ceredigion Car Park, Peterwell Terrace (in-centre): c.0.3ha; an operational council car park performing an important function, not being marketed and not available; too small even allowing for flexibility. Discounted.
- Site 2 – Ceredigion Car Park, Mount Walk (edge-of-centre): c.0.2ha; an operational council car park, not available; too small even allowing for flexibility. Discounted.
- Site 3 – Lampeter town-centre vacant units: none of the 18 vacant units surveyed is of a scale capable of accommodating the proposed store, even allowing for flexibility. Discounted.
- Site 4 – Land south of Pontfaen Road (University of Wales Trinity Saint David playing fields): the subject of a previous Aldi application refused by Ceredigion Council in March 2025 on grounds including significant adverse landscape effects, harm to the setting of the Grade II Listed Pavilion, harm to Lampeter Conservation Area and loss of playing space without compensation. The site is not considered suitable and is discounted.

7.7.2 There are no sites within Lampeter Town Centre, edge of centre or out of centre that can be considered available, suitable and viable for the proposed store.

7.8 Llanybydder District Centre

7.8.1 Llanybydder lies c.6.8km south-west of the site. The single vacant unit in the centre (the former Cellar Bar, c.415 sqm) is too small even allowing for flexibility (Site 5). Land adjacent to the Cross Hands Hotel (Site 6, c.750 sqm) and the Old Foundry / Station Terrace (Site 7, c.0.5ha, allocated for employment) are each too small and/or unsuitable and unavailable. Discounted.

7.9 Tregaron Urban Service Centre

7.9.1 Tregaron lies c.15.6km north-east of the site. The three vacant units surveyed (Site 8) are each too small even allowing for flexibility. Land to the rear of Talbot Yard (Site 9) is allocated for mixed use and housing and benefits from permissions for other uses; it is not available as an alternative. Discounted.

7.10 Summary and conclusions

The application site is a committed retail development site. Notwithstanding this, a sequential search has identified no available, suitable and viable sequentially preferable alternatives, even allowing for flexibility. The proposal accords with local and national policy and guidance and with judicial and appeal authority in respect of the sequential approach. This conclusion is consistent with the advice of the Council's own retail advisor, Nexus, which likewise concludes that the proposal passes the sequential test.

SECTION 8

Assessment of Impact

8.0 Assessment of Impact

8.1 Introduction

8.1.1 This section considers the trading effects of the proposed development, with particular regard to nearby centres. At c.1,962 sqm gross the store falls below the 2,500 sqm threshold at which PPW 12 (paragraph 4.3.26) indicates an impact assessment would typically be sought. Notwithstanding this, and in the interests of robustness, a proportionate impact assessment is provided, underpinned by the independent NEMS household survey. It has been updated to reflect the size of the store.

8.1.2 In respect of retail impact considerations it is material to note these matters were assessed in rigorous detail which was independently audited by the Council's retail advisors, Nexus, during application PL/08840; that application was supported by a Retail Impact Assessment (July 2025), Retail Impact Assessment Addendum (December 2025), and Supplemental Retail Analysis Note (February 2026), the approach and findings of which we do not look to repeat in detail here given the development's similarities.

8.2 Methodology and Evidence Base

8.2.1 The assessment follows a widely adopted, industry-accepted methodology consistent with TAN 4: establishing the catchment and base (2025) and design (2030) years; examining the 'no development' scenario and any commitments; assessing turnover and trade draw from the household survey and published sales densities; and assessing impact on existing centres. Trade diversion is assessed on the accepted principles that trading effects are broadly proportionate to distance and that stores compete on a 'like-for-like' basis – particularly LAD stores, which deliver a distinct discount-focused offer. A 2023 price base is applied throughout and the full tables are at Appendix D.

8.3 Impact on Existing, Committed or Planned In-centre Investment

8.3.1 Retail allocations and any committed or planned in-centre investment in the catchment has been considered as part of the sequential investigations in Section 7.0. There are no known, notable existing, committed or planned in-centre retail investment proposals in the catchment upon which the proposal may give rise to unacceptable impact. On the contrary, the proposal itself constitutes significant local retail investment at a sequentially preferable site.

8.5 Impact on Allocated Sites Outside Centres

8.5.1 There are no allocated sites outside centres in the catchment area upon which the proposed development may unacceptably impact.

8.6 Cumulative Effects

8.6.1 There are no known, notable outstanding convenience retail planning permissions within the PCA to be included as commitments in this assessment.

8.7 Impact on Centre Vitality and Viability and In-centre Turnover and Trade

Turnover and comparison goods

8.7.1 The proposed store has a total (convenience and comparison) turnover of c.£10.3m, of which the convenience turnover is c.£8.9m inclusive of inflow (c.£8.1m excluding inflow). Lidl's comparison offer is very modest, sold on a 'when it's gone it's gone' basis with no consistent range; the store is not a comparison destination and its capacity to affect local comparison shopping patterns is minimal. The assessment therefore focuses on convenience impact.

Forecast trade diversion – zonal assessment

8.7.2 A zonal convenience trade-diversion assessment is set out in the enclosed statistical tables. As before (PL/08440) our zonal trade assessment has not changed and it compares similarly to the assessment adopted by the Council's advisor (Nexus) at the time of the previous application. The key difference is the extent to which each assessment recognises that a local LAD store will claw back food-shopping trips currently leaking to LAD stores in Aberystwyth and Carmarthen.

8.7.3 The Nexus assessment implies that c.89% of the expenditure currently lost to LAD stores would continue to leak to those stores even after a local LAD store opens – including c.91% of expenditure lost to the Lidl in Aberystwyth and c.88% of that lost to the Aldi in Carmarthen. In the applicant's view this significantly under-estimates the store's effect on shoppers' choice of LAD store. The applicant's assessment adopts a more realistic clawback of c.23% of leaked LAD expenditure (against 11%); a greater diversion from distant LAD stores necessarily means a lower proportionate diversion from Lampeter stores. On this there was a difference of professional opinion (at app ref: PL/08440).

8.7.4 The Nexus pattern is derived by mirroring the trade draw of the Sainsbury's and Co-op stores. The LAD format is, however, materially different and is actively being sought out by local shoppers – hence the substantial outflow to stores over 20 miles away. Food shopping is predominantly a dedicated trip undertaken on a convenience basis; where a local LAD alternative is provided, a significant proportion of those trips will inevitably be diverted to it. We consider basing the store's trade draw on the existing non-LAD stores negates the very shopping patterns the proposal is designed to address, and thus produces an inflated impact on Sainsbury's, Lampeter.

Trading position of the Sainsbury's store

8.7.5 As agreed with the Council's advisors, Nexus, during app ref: PL/08440, the ability of the Sainsbury's store to absorb the trading effect depends in part on its trading performance. Further liaison with NEMS on the latest survey results confirms the store to be strongly overtrading; this is evidenced. Accounting for price-base adjustment, the South West Wales Regional Retail Study (2016 survey) also showed the store overtrading against current benchmark, and there is **no evidence** – then or now – that its trading position is vulnerable. Decision must be taken on evidence.

8.7.6 A sensitivity test (Tables 13 and 12A, Appendix D) demonstrates that even if the Sainsbury's convenience turnover were manually reduced to c.£20.2m in 2030 (just 12% above the SWRRS-derived figure adjusted to a 2023 price base), the store would still trade above benchmark following the developm In respect of app ref: PL/08440 we consider officers erred in the weighing up of important material considerations of retail impact in the planning balance.

8.7.7 ent and would continue to do so even under the higher (c.£5.7m) impact assessed by the Council's advisor. There is accordingly no evidence that the Sainsbury's store is vulnerable; the evidence points to the contrary. Notably, **the Council's advisor agrees that the Sainsbury's store's future viability and trading position is not vulnerable, advising[4]:**

"3.9 With regards to the forecast trading impact upon the Sainsburys store in Lampeter town centre, CS are keen to point out that there is no evidence to suggest that its future viability / trading position is vulnerable. Based upon the information available to us for the purposes of this advice report, we would agree with CS."

Linked trips and the wider town centre

8.7.8 The town-centre health check finds food retailing comprises a small proportion of the centre's composition; the majority comprises service and leisure uses with which the proposal does not overlap. The survey confirms that the significant majority of Sainsbury's main-food shoppers do not link trips – 64% of study-area respondents (rising to 70% in the PCA) said their main-food trip to Sainsbury's was not linked to any other activity. Conversely, LAD shoppers show a high propensity to link trips (e.g. 70% of Lidl Aberystwyth main shoppers), so the proposal will itself generate linked trips with Lampeter town centre, given its relative accessbility.

8.7.9 Any loss of linked trips is therefore likely to be modest and must be weighed against the linked trips <u>generated</u> by the new store and the significant reduction in car journeys and mileage arising from reduced out-commuting. As the Council's advisor accepts, the evidence of the RIA, the

[4] Supplementary Advice on Retail & Town Centre Planning Policy – Nexus, Feb 206

SWRRS and its own assessment does not suggest a failing town centre, and impact must be assessed against the vitality and viability of the centre as a whole, not on individual retailers or sub-sectors[5]. Town-centre improvements to encourage linked trips and dwell time could, if necessary, be secured through planning obligations.

Overall scale of impact and comparison with appeal decisions

8.7.10 The applicant's assessment finds a convenience impact on Lampeter town centre and an overall Class A1 impact materially lower than assessed by the Council's advisor. Notwithstanding this even taken at the advisor's level, impacts of this order have consistently been found not to be significantly adverse.

8.7.11 The overall health of Lampeter town centre is strong, having regard to the high number of (often independent) commercial units, the low reliance on weekly main-food retailing, non-commercial trip attractors such as the UWTSD campus, an average vacancy rate, the appeal of non-food uses, and the strong character of Lampeter as a visitor destination. It is well equipped to absorb the assessed trading effects.

Comparison with the refused Aldi proposal

8.7.12 For consistency in decision making, it is material that the current proposal differs materially from the previously Aldi scheme refused at Pontfaen Road in March 2025. The Lidl proposal is on a committed retail site with extant retail planning permission, unconstrained in heritage terms, with no loss of community land; it contains no 'retail pods' that would compete directly with, and risk relocation of, town-centre operators; and it is supported by evidence of significant local overtrading and demonstrable need. Local facilities are well placed to absorb the trading effects of a single foodstore, with no undue overlap or direct competition with other town-centre operators. The differences in evidence base – a materially newer household survey – also distinguish the two applications and evidence.

The retail balance

8.7.13 Impact can be both positive and negative, and it is not for the planning system to stymie commercial competition, which benefits consumers through reduced trip duration and pollution, reduced mileage cost and increased choice and price competitiveness. Where any residual detrimental consequences are identified, PPW 12 (paragraph 4.3.25) and the courts confirm that the retail impact test is only one consideration to be weighed in the balance (Zurich Assurance v North Lincolnshire Council). Here, any such consequences are outweighed by the material planning benefits of the proposal.

[5] Tollgate West, Secretary of State

8.9 Summary

8.9.1 In respect of app ref: PL/08440 we consider officers erred in the weighing up of important material considerations of retail impact in the planning balance.

8.9.2 The proposed development will not result in a significant adverse impact on existing, committed or planned in-centre investment, allocated sites, or the vitality and viability of nearby centres, with particular regard to Lampeter. The updated evidence demonstrates that the town centre is vital, viable and diverse; that its principal foodstore is strongly overtrading and resilient to competition, with no evidence of vulnerability; that the significant majority of main-food shoppers do not link trips; and that the proposal will itself generate linked trips whilst delivering substantial sustainability benefits. Any detrimental consequences through trade diversion are not significantly adverse and are, in our view, clearly outweighed by the benefits of the proposal. The proposal is thus considered to accord with Policy SP8 of the LDP and Section 4.3 of PPW 12.

SECTION 9

Other Principal Planning Considerations

9.0 Other Principal Planning Considerations

9.1 Introduction

9.1.1 The preceding sections of this report have addressed retail policy considerations, including the sequential test and the potential impact on the vitality and viability of existing centres. These assessments conclude that the revised scheme is compliant with both national and local planning policy in this regard.

Summary of Previous Consultation Responses

9.1.2 During the determination of planning application PL/08840, consultation was undertaken with a range of statutory and non-statutory consultees. Significantly, no overriding objections were raised by technical consultees in relation to matters including highways, drainage, ecology, environmental health or infrastructure provision.

9.1.3 The findings of the consultation process demonstrated that the application site is capable of accommodating development without resulting in unacceptable technical or environmental impacts.

9.1.4 The current application is supported by updated technical information where necessary and there have been no material changes that would alter the conclusions previously reached by consultees.

9.1.5 This section now considers the principal non-retail planning policy matters relevant to the proposed development, specifically:

- Design and Appearance
- Landscape and Visual Impact
- Flood Risk and Drainage
- Biodiversity and Green Infrastructure
- Highways, Accessibility and Transport
- Residential Amenity
- Socio-Economic Benefits
- Sustainability
- Ground Conditions

9.3 Design and Appearance

9.3.1 The proposed development comprises a modern Lidl foodstore together with associated parking, servicing, landscaping, drainage infrastructure and ancillary works. The design has evolved through an iterative process informed by technical assessments, stakeholder engagement and feedback received during the determination of the previous application.

9.3.2 The proposed store adopts Lidl's contemporary store format and has been designed to balance operational requirements with the characteristics of the application site and its wider setting. The building has been carefully positioned within the site to maintain efficient customer circulation, safe servicing arrangements and an active frontage facing the principal customer parking area.

9.3.3 Since the submission of application PL/08840, a number of minor amendments have been incorporated into the proposals. These changes do not alter the fundamental nature or scale of the development but further refine the layout and appearance of the scheme having regard to technical considerations and the wider landscape strategy.

9.3.4 Compared with the previously submitted scheme, the current proposals incorporate a refined site layout, updated parking arrangements, revised access and circulation details and amendments arising from the development of the flood mitigation and drainage strategy. These changes represent design refinements rather than substantive alterations to the development concept and further strengthen the overall quality of the proposal.

9.3.5 The revised layout provides 102 customer parking spaces, including accessible parking spaces, parent and child spaces and electric vehicle charging facilities. The updated arrangement reflects ongoing design optimisation whilst continuing to ensure appropriate customer accessibility and operational efficiency.

9.3.6 The building has been integrated with a comprehensive landscape framework which includes structural planting, boundary treatments and public realm enhancements. The design seeks to soften views of the development, strengthen landscape integration and reinforce the site's role as an important gateway location on the approach to Lampeter.

9.3.7 Particular attention has been given to the relationship between the proposed development, the surrounding road network and the wider landscape setting. The layout maintains clear pedestrian routes, cycle parking provision and legible access arrangements, whilst ensuring the development remains readily accessible to customers arriving by a range of transport modes.

9.3.8 The proposed development will replace an underutilised site with a high-quality, purpose-built retail facility capable of serving Cwmann, Lampeter and the wider rural catchment. The design responds appropriately to the site's prominent location and has been carefully considered alongside the landscape, transport and flood risk requirements that have informed the evolution of the scheme.

9.3.9 Overall, the proposed development represents a well-designed and visually coherent scheme which will provide a modern retail environment whilst contributing positively to the appearance and functionality of the site.

9.3.10 The proposal is therefore considered to accord with PPW's placemaking objectives together with Strategic Policy SP1 and Policy GP1 of the Carmarthenshire LDP, which seek to secure high quality, sustainable and contextually responsive development.

9.4 Landscape and Visual Impact

9.4.1 The application is supported by a Landscape and Visual Impact Assessment (LVIA), an updated Landscape and Ecological Design Scheme and an Arboricultural Assessment. Collectively, these documents have informed the evolution of the proposals and demonstrate that the development can be accommodated without giving rise to unacceptable landscape or visual effects.

9.4.2 The application site occupies a prominent location on the approach to Lampeter and lies within the Teifi Valley Special Landscape Area (SLA). The site is however, strongly influenced by existing transport infrastructure, settlement edge development and commercial activity, forming part of the transition between the built-up areas of Lampeter and Cwmann. As such, the site does not comprise an isolated or undeveloped landscape parcel and has the capacity to accommodate a sensitively designed development.

9.4.3 The proposed development has been designed having regard to the landscape characteristics of the site and its surroundings. Careful consideration has been given to the siting of the building, parking areas, boundary treatments, earthworks and planting proposals to ensure that the development integrates appropriately with its landscape setting.

9.4.4 Landscape and visual matters were considered in detail during the determination of planning application PL/08840. Whilst acknowledging that landscape and visual effects would arise as a consequence of development, the Council's Landscape Officer accepted the findings of the submitted LVIA and concluded that the proposal would not result in unacceptable effects on the wider Teifi Valley SLA. Importantly, the Landscape Officer advised that the development did not present justifiable grounds for refusal on landscape grounds.

9.4.5 Since the submission of the previous application, the landscape proposals have been refined through the preparation of an updated Landscape and Ecological Design Scheme. The revised strategy provides a comprehensive landscape framework that assists in integrating the development into its surroundings whilst reinforcing the site's role as an important gateway into Lampeter.

9.4.6 The Landscape and Ecological Design Scheme includes a substantial programme of structural planting, native hedgerow establishment and public realm enhancements. The proposals have been developed to strengthen the site's landscape structure, soften views of the development and reinforce local landscape character.

Arboriculture

9.4.7 An updated Arboricultural Assessment has been undertaken in support of the application and has informed the design and layout of the proposed development. Existing trees and hedgerows have been assessed and retained wherever practicable, with the development designed to respect important landscape features and minimise unnecessary vegetation loss.

9.4.8 Existing boundary vegetation will continue to provide an important landscape framework for the site and will be supplemented by significant new planting. The proposed tree planting strategy will strengthen the site's vegetated boundaries, improve visual containment and contribute positively to the long-term landscape structure of the area.

9.4.9 The landscape proposals include the provision of extensive new tree planting across the site, creating a stronger and more diverse landscape framework than currently exists. This will assist in mitigating visual effects whilst contributing positively to the character and appearance of the site over time.

Visual Effects

9.4.10 The LVIA identifies that views of the proposed development will be available from a number of locations in the immediate vicinity of the site. However, the effects are principally localised in nature and must be considered within the context of the site's relationship with the existing highway network, neighbouring development and settlement edge character.

9.4.11 The proposed planting strategy will become increasingly effective as it matures, assisting in filtering views of the development and reducing the prominence of built form within the wider landscape.

9.4.12 Whilst the development will inevitably alter the appearance of the site, the effects are not considered to give rise to unacceptable harm to landscape character or visual amenity. The findings of the original LVIA therefore remain robust and applicable to the current application.

Landscape Conclusion

9.4.13 The proposed development has been informed by detailed landscape, visual and arboricultural assessment and incorporates a comprehensive landscape framework designed to integrate the development into its surroundings.

9.4.14 The conclusions reached by the Council's Landscape Officer during the determination of the previous application remain highly relevant. The development will not result in unacceptable effects on the wider Teifi Valley SLA and does not give rise to overriding landscape or visual concerns.

9.4.15 It is therefore concluded that the proposal represents an acceptable form of development in landscape and visual terms and accords with Strategic Policies SP1 and SP14 together with Policies GP1, EQ5 and EQ6 of the Carmarthenshire LDP.

9.5 Flood Risk and Drainage

9.5.1 An updated Flood Consequences Assessment (FCA) and Drainage Strategy have been prepared by Lucion in support of the application. The assessments consider flood risk, surface water management, flood mitigation measures and the long-term operation of the proposed development.

9.5.2 The updated FCA concludes that the development can be accommodated safely and that the consequences of flooding can be managed appropriately through the incorporation of mitigation measures, including the elevated store design, flood warning procedures and long-term management arrangements.

9.5.3 Flood risk considerations were examined in detail during the determination of the previous application. In its consultation response dated 14 April 2026, NRW confirmed that the 1D-2D hydraulic model prepared by Lucion was suitable to support the FCA and acknowledged that the proposed store would comply with the relevant flood criteria through the raised floor level and stilted construction design. NRW's concerns related principally to the operation and long-term management of the development, including flood warning procedures and maintenance of the flood storage void beneath the building.

9.5.4 Following receipt of NRW's comments, a meeting was held between representatives of NRW, CarneySweeney, Lidl and Lucion on 14 May 2026 to discuss the outstanding flood risk matters. During that meeting, NRW confirmed that, whilst it was required to formally record concerns where proposals did not strictly comply with TAN 15, it was not objecting to the application and that the ultimate planning judgement rested with the LPA.

9.5.5 The meeting further confirmed NRW's acceptance in principle of the proposed Flood Warning and Evacuation Plan ("FWEP") and the preparation of a maintenance strategy for the flood storage void beneath the store. NRW confirmed that these represented appropriate mechanisms for addressing the concerns raised within its consultation response.

9.5.6 NRW also acknowledged that the FCA modelling undertaken by Lucion had already gone a considerable way in assessing flood risk and accepted that additional modelling work was unlikely to materially alter the overall conclusions reached in the assessment.

9.5.7 Subsequently, NRW confirmed that the FCA was "in a good state" and could be relied upon to inform the preparation of any flood warning, evacuation or maintenance plans required by the LPA. NRW also confirmed that its previous response remained applicable.

9.5.8 In parallel, the proposed drainage strategy was considered through the separate SAB process. Approval was secured under the relevant SAB application, and Carmarthenshire County Council subsequently confirmed that it had no drainage concerns in relation to the site.

9.5.9 Taken together, the updated FCA, Drainage Strategy, SAB approval and detailed engagement with NRW demonstrate that flood risk and drainage matters can be satisfactorily managed and do not represent barriers to the delivery of the development.

9.5.10 Accordingly, the proposal is considered to accord with Planning Policy Wales, TAN 15 and Policies EP1 and EP3 of the Carmarthenshire Local Development Plan relating to water quality, flood risk and sustainable drainage.

9.6 Biodiversity and Green Infrastructure

9.6.1 The application is supported by an updated Preliminary Ecological Appraisal (PEA), Construction Environmental Management Plan (CEcMP), Shadow Habitat Regulations Assessment (sHRA), Green Infrastructure Statement and Landscape and Ecological Design Scheme. Collectively, these documents assess the ecological value of the site, the potential effects of the proposed development and the measures necessary to protect, enhance and manage biodiversity and green infrastructure assets.

9.6.2 The ecological assessments identify that the application site is predominantly comprised of modified grassland, hardstanding and scrub habitats of relatively low ecological value. The principal ecological feature associated with the site comprises the boundary hedgerow and associated trees, which provide habitat and connectivity functions within the local landscape.

9.6.3 Updated ecological surveys confirm that the site supports limited ecological interest and does not provide significant habitat for protected species. Surveys undertaken to inform the application have identified no overriding ecological constraint to development and have informed the mitigation and enhancement measures incorporated within the scheme.

9.6.4 Particular consideration has been given to the proximity of the Afon Teifi SAC and SSSI. Given the ecological importance of the river corridor, the proposed development has been designed to avoid adverse effects on designated features and incorporates a range of measures to ensure that ecological receptors are protected during both the construction and operational phases of development.

9.6.5 Ecological matters were considered in detail during the determination of planning application PL/08840 by both NRW and the Council's Ecologist. Whilst comments were raised in relation to construction management, pollution prevention, lighting controls and ecological safeguards, no overriding ecological objections were raised to the principle of development. The comments received focused principally on mitigation, management and the securing of appropriate ecological safeguards.

9.6.6 In response to matters identified through the previous application process, a detailed CEcMP has been prepared which establishes the procedures and controls that will be implemented during construction. These include pollution prevention measures, protection of watercourses, ecological supervision, construction lighting controls, invasive species management, protected species safeguards and habitat protection measures.

Green Infrastructure Strategy

9.6.7 In accordance with PPW 12, the proposed development has been informed by a Green Infrastructure-led design approach. The Green Infrastructure Statement demonstrates how the scheme has sought to maintain, strengthen and enhance existing green infrastructure assets whilst creating new ecological and landscape features throughout the site.

9.6.8 The proposals deliver a comprehensive package of green infrastructure enhancements including:

- extensive native tree planting;
- new native hedgerow planting;
- creation of a community orchard;
- species-rich meadow grassland;
- pollinator-friendly planting areas;
- sustainable drainage features including an attenuation pond;
- habitat enhancement measures for birds, bats and other wildlife; and
- long-term ecological and landscape management arrangements.

9.6.9 The proposed planting and habitat creation measures will strengthen ecological connectivity across the site and improve links between existing habitat features within the wider landscape. The development has been designed to retain and reinforce existing ecological corridors whilst creating new opportunities for wildlife movement and foraging.

9.6.10 The Green Infrastructure Statement concludes that the proposals will substantially increase habitat diversity across the site and deliver meaningful biodiversity enhancements when compared with the existing baseline conditions.

Nutrient Neutrality and Designated Sites

9.6.11 The application is supported by a Nutrient Neutrality Mitigation Strategy, updated nutrient budget calculations and a Shadow Habitat Regulations Assessment. The updated sHRA has been prepared having regard to the revised site layout and confirms that the mitigation strategy remains effective in delivering nutrient neutrality. Accordingly, the assessment concludes that the proposed development will not adversely affect the integrity of the Afon Teifi SAC, either alone or in combination with other plans or projects

Biodiversity and Green Infrastructure Conclusion

9.6.12 The proposed development has been informed by detailed ecological assessment and incorporates a robust package of avoidance, mitigation, compensation and enhancement measures. The updated evidence demonstrates that biodiversity interests, designated sites and ecological connectivity can be appropriately protected throughout the construction and operational phases of the development.

9.6.13 Importantly, the concerns raised by ecological consultees during the determination of the previous application related to mitigation and management measures rather than the principle of development itself. The current application responds directly to those matters through the submission of updated ecological information, the CEcMP, CEMP, the sHRA and the Green Infrastructure Statement.

9.6.14 It is concluded that the proposal will not result in unacceptable ecological impacts and will deliver significant green infrastructure and biodiversity enhancements through habitat creation, native planting, ecological connectivity improvements and long-term management. The development therefore accords with Section 6 of the Environment (Wales) Act 2016, PPW 12, Strategic Policy SP14 and Policies EQ4 and EQ5 of the Carmarthenshire LDP.

9.7 Highways, Accessibility and Transport

9.7.1 An updated Transport Assessment (TA) has been prepared by SCP Transport Planning in support of the application. The assessment considers the accessibility of the site by all modes of transport, the operation of the proposed access arrangements, parking provision, highway safety and the effect of the development on the surrounding highway network.

9.7.2 The site occupies a highly accessible location on the edge of Lampeter, fronting both the A482 and A485. The site is situated approximately 650m from Lampeter Town Centre and benefits from established pedestrian, cycle and public transport connections serving both Lampeter and Cwmann.

Accessibility and Sustainable Travel

9.7.3 The updated TA confirms that the site is readily accessible by a range of transport modes. Existing footways connect the site with Lampeter Town Centre, neighbouring residential areas and local services, whilst a range of facilities including schools, healthcare, community facilities and public transport services are located within convenient walking distance of the site.

9.7.4 The assessment demonstrates that Lampeter, Cwmann and a number of surrounding settlements fall within realistic walking and cycling catchments of the site. The development will also provide secure customer and staff cycle parking together with associated active travel infrastructure.

9.7.5 Existing bus stops are located immediately adjacent to the site and provide connections to destinations including Aberystwyth, Llanybydder and Carmarthen. The proposed development also incorporates enhancements to local public transport infrastructure, including improvements to the nearest bus stop facilities.

Highway Safety

9.7.6 A review of Personal Injury Accident data was undertaken covering the most recent five-year period available. The assessment identified no existing highway safety issues in the vicinity of the site that would be exacerbated by the proposed development. Of the ten recorded incidents identified within the wider study area, only one occurred in the immediate vicinity of the application site and resulted in slight injury. SCP therefore concluded that there is no evidence of an existing highway safety problem associated with the development site.

9.7.7 A Stage 1 Road Safety Audit was undertaken on the proposed access arrangements. No fundamental safety concerns were identified and the matters raised related to detailed design considerations including drainage, visibility maintenance, lighting and junction detailing. SCP's Designer's Response confirmed that all matters could be addressed through the detailed design process and concluded that there were no insurmountable highway safety issues associated with the proposals.

Traffic Generation and Network Impact

9.7.8 The updated TA considers the traffic effects of the proposed development using industry-standard TRICS data derived from comparable Lidl stores across the UK. The assessment also recognises that a significant proportion of customer trips will comprise linked, pass-by or diverted trips already present on the surrounding road network.

9.7.9 Junction capacity assessments were undertaken for both the proposed site access and the existing A482/A485 junction under opening year and future year scenarios. The assessments demonstrate that all junctions continue to operate well within capacity with the proposed development in place.

9.7.10 Importantly, the TA concludes that the proposed site access will operate comfortably within capacity through both the opening year and future assessment year scenarios. Similarly, the impact of the development on the existing A482/A485 junction is assessed as negligible, with only minimal changes in queue lengths and delays forecast. SCP concludes that there is no material increase in congestion or delay directly attributable to the proposed development.

9.7.11 The assessment therefore concludes that the impact of the development on the surrounding highway network is de minimis and that there is no evidence of any unacceptable highway impact or residual cumulative impact that could be considered severe.

Parking and Servicing

9.7.12 The proposals incorporate 102 customer parking spaces, including accessible parking bays, parent and child spaces and electric vehicle charging facilities. Parking accumulation assessments undertaken by SCP demonstrate that the proposed parking provision comfortably exceeds forecast demand during both weekday and weekend peak periods and provides sufficient spare capacity to accommodate seasonal trading peaks.

9.7.13 Delivery and servicing arrangements have also been assessed. The development will typically generate one HGV delivery per day, increasing to two/three deliveries during peak seasonal periods. Swept-path assessments demonstrate that service vehicles can safely access and manoeuvre within the site in forward gear.

Previous Application and Consultation Response

9.7.14 Highway matters were carefully considered during the determination of planning application PL/08840. Significantly, the Highway Authority raised no objection to the proposed development and recommended a series of planning conditions relating to detailed implementation and infrastructure matters rather than the principle of the development itself.

9.7.15 Furthermore, highway safety, traffic generation, parking and accessibility did not form part of the reasons for refusal. The delegated refusal accepted that the proposal could be accommodated on the local highway network and the principal issues in dispute related to retail planning considerations rather than transport impacts.

Transport and Accessibility Improvements

9.7.16 In addition to demonstrating that the development can be accommodated safely on the local highway network, the proposed development will deliver a number of transport and accessibility improvements that will benefit both customers and the wider community.

9.7.17 These improvements include the provision of enhanced pedestrian infrastructure, improved connections to existing footway networks, secure cycle parking facilities and enhancements to local public transport infrastructure in the vicinity of the site.

9.7.18 The proposals also include improvements to the adjacent highway environment through the delivery of a new bus stop and associated infrastructure together with pedestrian crossing facilities designed to improve connectivity between the site, Lampeter and Cwmann.

9.7.19 The development will improve accessibility to day-to-day shopping facilities for residents of Lampeter and the surrounding rural catchment, reducing the need for longer shopping trips to larger centres outside the area. In this regard, the proposal supports the objectives of PPW 12 in promoting sustainable travel patterns and improving access to services.

9.7.20 The site occupies a location directly on established travel routes already used by residents for employment, education and shopping purposes. Consequently, a significant proportion of trips to the store are anticipated to comprise linked, pass-by and diverted trips rather than wholly new journeys on the highway network.

Transport Conclusions

9.7.21 The conclusions of the updated Transport Assessment therefore reinforce the position that the proposal accords with Strategic Policies SP1 and SP17 together with Policies TR2, TR3 and TR4 of the Carmarthenshire Local Development Plan and there are no transport-related reasons that would preclude the grant of planning permission.

9.9 Residential Amenity

9.9.1 Policy GP1 of the Carmarthenshire LDP requires development proposals to safeguard the amenity of neighbouring occupiers and ensure that new development does not result in unacceptable impacts on those who live, work or visit the area.

9.9.2 The application site occupies a transitional location between Lampeter and Cwmann and is surrounded by a varied mix of uses including residential development, agricultural land, roadside commercial activity and strategic highway infrastructure. The site is therefore not located within a predominantly residential environment and is influenced by existing traffic movements associated with the A482 and A485.

9.9.3 The proposed development has been designed having regard to neighbouring land uses and the need to maintain an appropriate standard of amenity for nearby residents. The siting of the building, customer parking areas, servicing arrangements and landscape buffers has evolved through the design process to ensure that the operational requirements of the store are appropriately accommodated within the site.

9.9.4 The foodstore building is located within the eastern part of the site, whilst parking, landscaping and circulation areas provide separation from surrounding properties. The proposed landscaping strategy will further reinforce site boundaries and assist in integrating the development into its surroundings.

9.9.5 Customer activity associated with the development will be typical of a retail use of this nature and will primarily occur within the main parking and circulation areas. Given the site's relationship with the surrounding road network and the separation provided between the operational areas of the development and nearby residential properties, the proposal is not considered likely to give rise to unacceptable levels of disturbance.

9.9.6 Servicing will be undertaken from the dedicated service area located on the western elevation of the building. Lidl stores typically receive a limited number of deliveries per day and unloading periods are generally short in duration. Having regard to the characteristics of the site and surrounding land uses, servicing arrangements are not considered likely to result in unacceptable amenity impacts.

9.9.7 The application is supported by a detailed external lighting strategy and associated lighting calculations. The proposed lighting scheme has been designed to provide safe and effective illumination of customer, staff and servicing areas whilst minimising unnecessary light spill beyond the site boundary. Modern LED luminaires and appropriate lighting controls will be utilised throughout the development to ensure that lighting levels remain proportionate to operational requirements and do not result in unacceptable impacts on neighbouring properties or the wider landscape setting.

9.9.8 The previous planning application was accompanied by a comprehensive suite of technical assessments and no overriding concerns were identified in relation to residential amenity.

Significantly, residential amenity considerations did not form part of the delegated reasons for refusal and no evidence was identified to suggest that the operation of the proposed foodstore would result in unacceptable living conditions for nearby residents.

9.9.9 The current application proposes a development which remains substantially unchanged in principle from that previously assessed. The minor amendments incorporated within the revised scheme do not materially alter the relationship between the development and neighbouring properties, nor do they affect the conclusions previously reached in respect of residential amenity.

9.9.10 Accordingly, the proposed development is not considered to result in unacceptable effects in terms of noise, disturbance, overlooking, loss of privacy, visual impact or general residential amenity and is therefore considered to accord with Policy GP1 of the Carmarthenshire LDP and the placemaking objectives of PPW 12.

9.10 Socio-Economic Benefits

9.10.1 The proposed Lidl store will deliver substantial economic and social value to Wales, in line with Lidl's proven impact across the region and nationally. In 2024, Lidl contributed £808.2 million in Gross Value Added (GVA) to the Welsh economy. The business supports 14,928 jobs in Wales, comprising 1,350 direct roles and 13,578 indirect positions, and generated £57.5 million in tax revenues for public services in 2024. Lidl also invests in local communities, donating £160,485 to Welsh causes, providing over one million meals to tackle food insecurity, and delivering healthy eating education to 11,995 children through its Lidl Foodies programme. Environmental benefits include avoiding over 1,600 tonnes of CO2 emissions through food redistribution and efficiency measures.

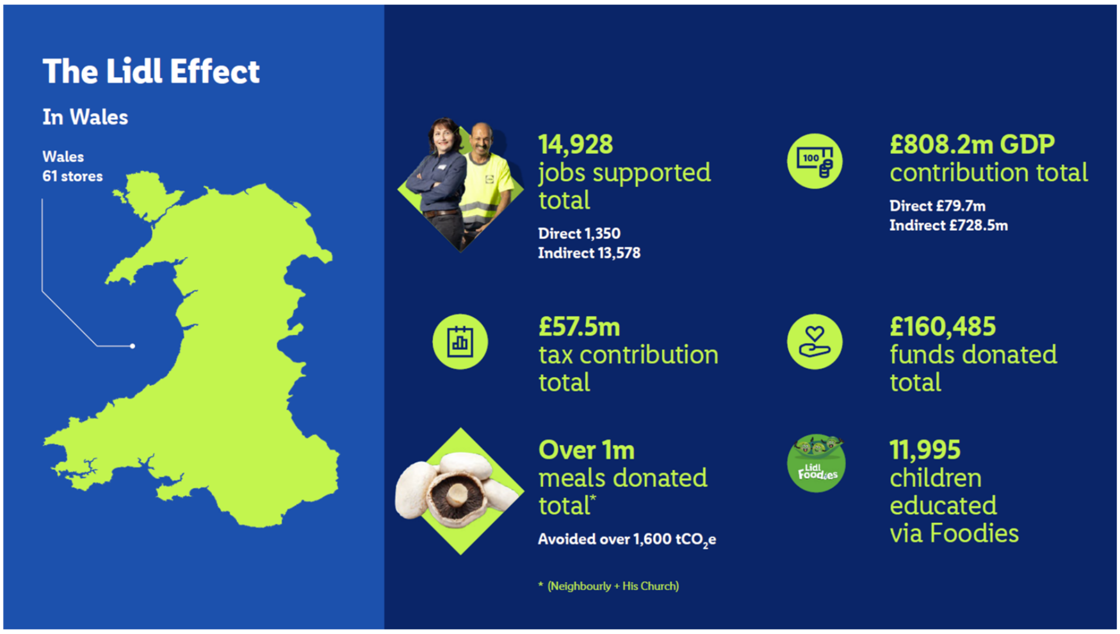


Figure 8.1 Extract from Lidl Effect Regional Report (Appendix D)

9.10.2 At a national level, in 2024, Lidl generated £14.5 billion in GVA across the UK (0.56% of UK GVA), supported 281,813 jobs, paid over £1 billion in taxes, and invested £474 million in new stores and distribution centres. Around two-thirds of Lidl's products are sourced from British suppliers and invested £5.8 billion in British food and farming, reinforcing domestic agriculture and manufacturing. In addition, Lidl supported 281,813 jobs and paid £392 million in wages above the Living Wage benchmark, demonstrating its commitment to fair employment. Lidl also donated 18.5 million meals, alleviating an estimated £79.5 million in NHS costs linked to malnutrition and obesity, and raised £10 million for the NSPCC, funding Childline counselling and safeguarding services.

Figure 8.2 Extract from Lidl Effect Report (Appendix D)

9.10.3 These figures demonstrate that the proposed store will not only create local employment and strengthen supply chains but also contribute meaningfully to public revenues, community wellbeing, and sustainable development.

9.10.4 A full copy the 'Lidl Effect' Socio-Economic Impact Report is provided in **Appendix B**.

9.10.5 In summary, the proposed Limited Assortment Discount (LAD) store will deliver a range of benefits as an employment-generating use. During the construction phase, the scheme will create jobs and support local economic activity, as workers spend earnings within the community. At the operational stage, the foodstore will provide approximately 40 full-time equivalent (FTE) roles, ranging from store assistants and cleaners to managerial positions. These jobs will be accessible by foot or bicycle for the surrounding population. Lidl currently offers a retail industry-leading wage of £12.40 per hour, rising to £13.35 per hour for long service.

9.10.6 The economic and employment benefits associated with the development attract significant weight in favour of the proposal and support the objectives of Strategic Policies SP1, SP3 and SP8 of the Carmarthenshire LDP.

9.11 Sustainability and Climate Change

9.11.1 Sustainability has been a key consideration throughout the design and development of the proposed foodstore. The proposal incorporates a range of measures designed to minimise energy consumption, reduce carbon emissions and promote sustainable patterns of travel.

9.11.2 Lidl stores are designed to achieve high standards of energy efficiency. The proposed store will incorporate highly efficient building systems and operational measures intended to minimise energy demand and improve long-term environmental performance.

9.11.3 The building will utilise high-efficiency heating and ventilation systems, with heating regulated through intelligent controls and sensors designed to minimise unnecessary energy consumption. The building envelope and canopy design have also been developed to reduce thermal gain and improve operational efficiency.

9.11.4 Renewable energy generation forms an important component of the proposals. The store will incorporate rooftop solar photovoltaic panels . The system will generate renewable electricity on-site and make a significant contribution towards the operational energy requirements of the store.

9.11.5 Energy-efficient lighting systems will be incorporated throughout the development. Lighting within storage and servicing areas will be controlled through motion sensors, whilst the sales area will utilise a Building Management System and Lux sensors to optimise lighting levels and minimise energy consumption outside trading hours.

9.11.6 Sustainable construction techniques will be utilised during both the construction and operational phases of the development wherever practicable.

Sustainable Location and Reduced Travel Demand

9.11.7 In addition to the sustainability measures incorporated within the building itself, the proposed development will improve access to food shopping facilities for residents of Lampeter and the surrounding rural catchment.

9.11.8 The application is supported by a Mileage Change Technical Note which demonstrates that the provision of a Lidl foodstore in Lampeter would significantly reduce the need for residents to travel to alternative discount foodstores in larger centres such as Aberystwyth and Carmarthen. The assessment forecasts annual mileage savings of between approximately 34,000 and 44,000 miles as existing expenditure leakage is retained within the local area.

9.11.9 The supporting analysis further demonstrates that these mileage reductions would result in annual carbon savings of between approximately 9.2 and 11.9 tonnes of CO_2e, representing a meaningful environmental benefit associated with the proposal.

9.11.10 During the determination of the previous application, Nexus Planning acknowledged that the reduction in shopping mileage arising from the development would represent a material benefit of the proposal and accepted that the forecast mileage reductions were reasonable.

9.11.11 The proposed development combines energy-efficient building design, on-site renewable energy generation and sustainable operational practices with a highly accessible location capable of reducing longer-distance shopping trips currently undertaken by residents.

9.11.12 The proposal therefore supports the sustainability objectives of PPW 12, Future Wales, Strategic Policies SP1 and SP2 of the Carmarthenshire LDP and the wider objective of reducing the need to travel by providing access to affordable food shopping within Lampeter and its rural catchment.

9.12 Ground Conditions

9.12.1 A Phase 2 Ground Investigation was undertaken by Remada Ltd in October 2024. This followed the preparation of the Phase 1 ground investigation in August 2024.

9.12.2 Overall, the investigation concludes that the site is suitable for the proposed development subject to ground improvement, radon protection, and appropriate waste management during construction.

CARNEYSWEENEY

SECTION 10

Summary & Conclusions

10.0 Summary and Conclusions

10.1 Introduction

10.1.1 This Planning and Retail Statement has been prepared by CarneySweeney on behalf of Lidl Great Britain Limited to accompany a planning application for the erection of a discount foodstore, together with associated access, parking, landscaping, drainage and ancillary development on land at the former Penybont farm off the A482, Cwmann, Lampeter. The application constitutes a resubmission of app ref: PL/08440.

10.1.2 The Statement assesses the proposed development against the relevant Development Plan and other material considerations. The key findings are:

- The application site occupies a highly accessible location between Lampeter and Cwmann and is well related to the communities it is intended to serve, supporting the sustainable development objectives of PPW 12 and the Carmarthenshire LDP.
- The proposal will deliver a modern discount foodstore which responds directly to an identified demand for enhanced consumer choice, increased competition and access to affordable food shopping within Lampeter and its wider rural catchment.
- In respect of app ref: PL/08440 we consider officers erred in the weighing up of important material considerations of retail need and impact in the planning balance. The accompanying retail evidence demonstrates compliance with the relevant retail policy framework, including PPW 12, TAN 4 and Policies SP8 and RT1 of the Carmarthenshire LDP. The evidence confirms that no suitable, available and viable sequentially preferable site exists capable of accommodating the proposed development.
- The proposed development will deliver a significant investment in Lampeter and provide a range of economic and social benefits, including approximately up to 40 jobs, inward investment, enhanced consumer choice, expenditure retention and improved access to services.
- The scheme incorporates a range of sustainability measures including renewable energy generation, energy efficient building systems, sustainable drainage infrastructure, extensive landscaping and biodiversity enhancements together with reductions in shopping mileage and associated carbon emissions.
- Updated technical assessments demonstrate that the development can be accommodated without resulting in unacceptable impacts in respect of highways, accessibility, residential amenity, landscape and visual effects, arboriculture, ecology, biodiversity, flood risk, drainage or ground conditions.
- The proposal will deliver significant green infrastructure and biodiversity enhancements through native planting, habitat creation, ecological connectivity improvements, sustainable drainage features and long-term landscape and ecological management.

10.1.3 Importantly, during the determination of application PL/08840, no overriding technical objections were raised by the relevant statutory consultees and none of the matters addressed within Section 8 formed part of the delegated reasons for refusal.

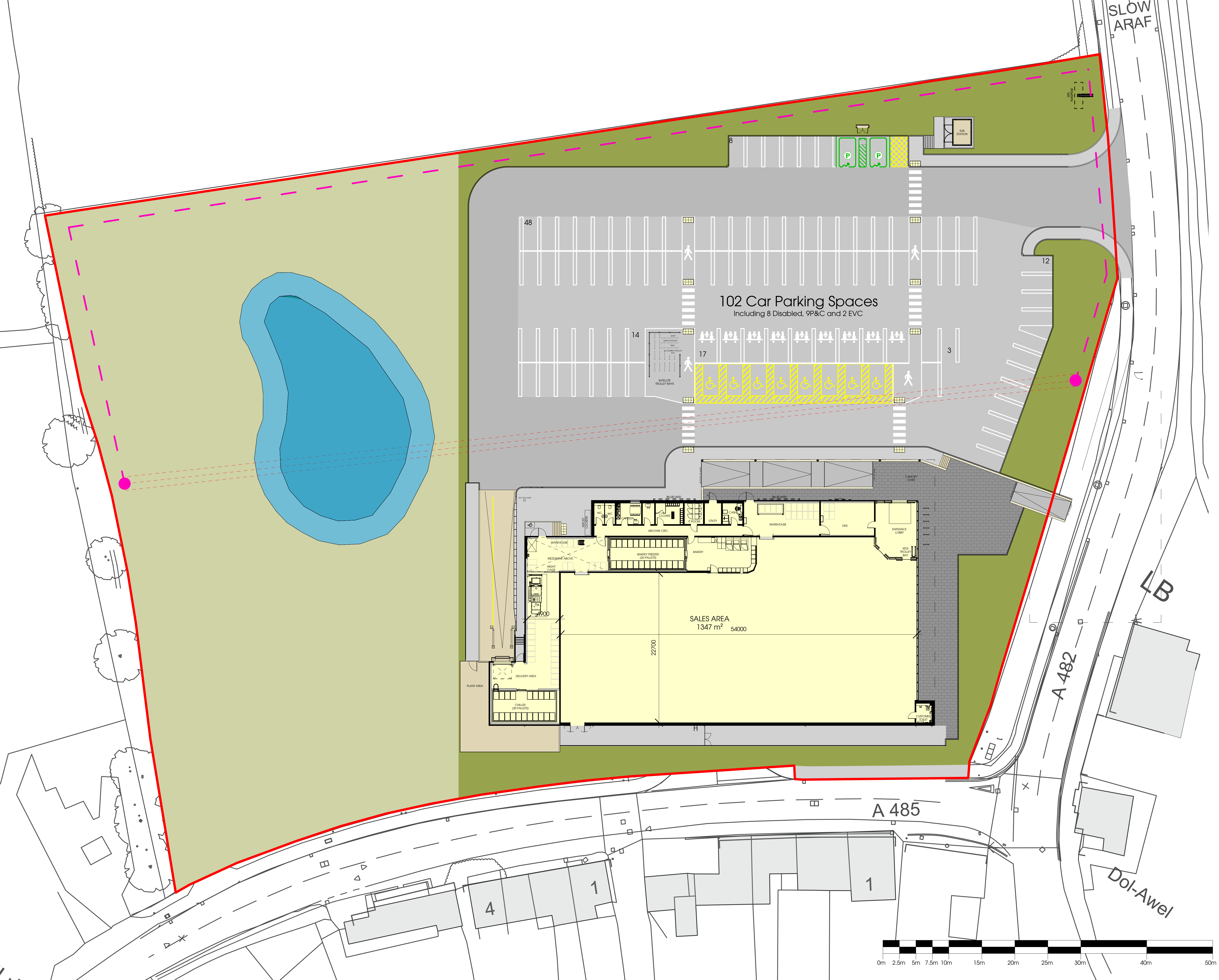
10.1.4 The proposed development represents a sustainable and policy-compliant form of development which will provide enhanced food retail provision for Lampeter, Cwmann and the wider rural catchment whilst delivering significant economic, social and environmental benefits.

10.1.5 When assessed against the Development Plan as a whole, together with all other material considerations, the proposal accords with the objectives of PPW 12 and the Carmarthenshire LDP.

Accordingly, it is respectfully concluded that the balance of planning considerations weighs firmly in favour of the proposal and planning permission should be granted.

CARNEYSWEENEY

Appendix A – Site Layout Plan



Rev.	Date	Description	Drawn

htcarchitects

York Place Studio
8 Britannia Street
Leeds
LS1 2DZ

T:(0113) 244 3457

W: www.htcarchitects.co.uk
E: info@htcarchitects.co.uk

client
Lidl GB Ltd.

project
Cwmann, Lampeter

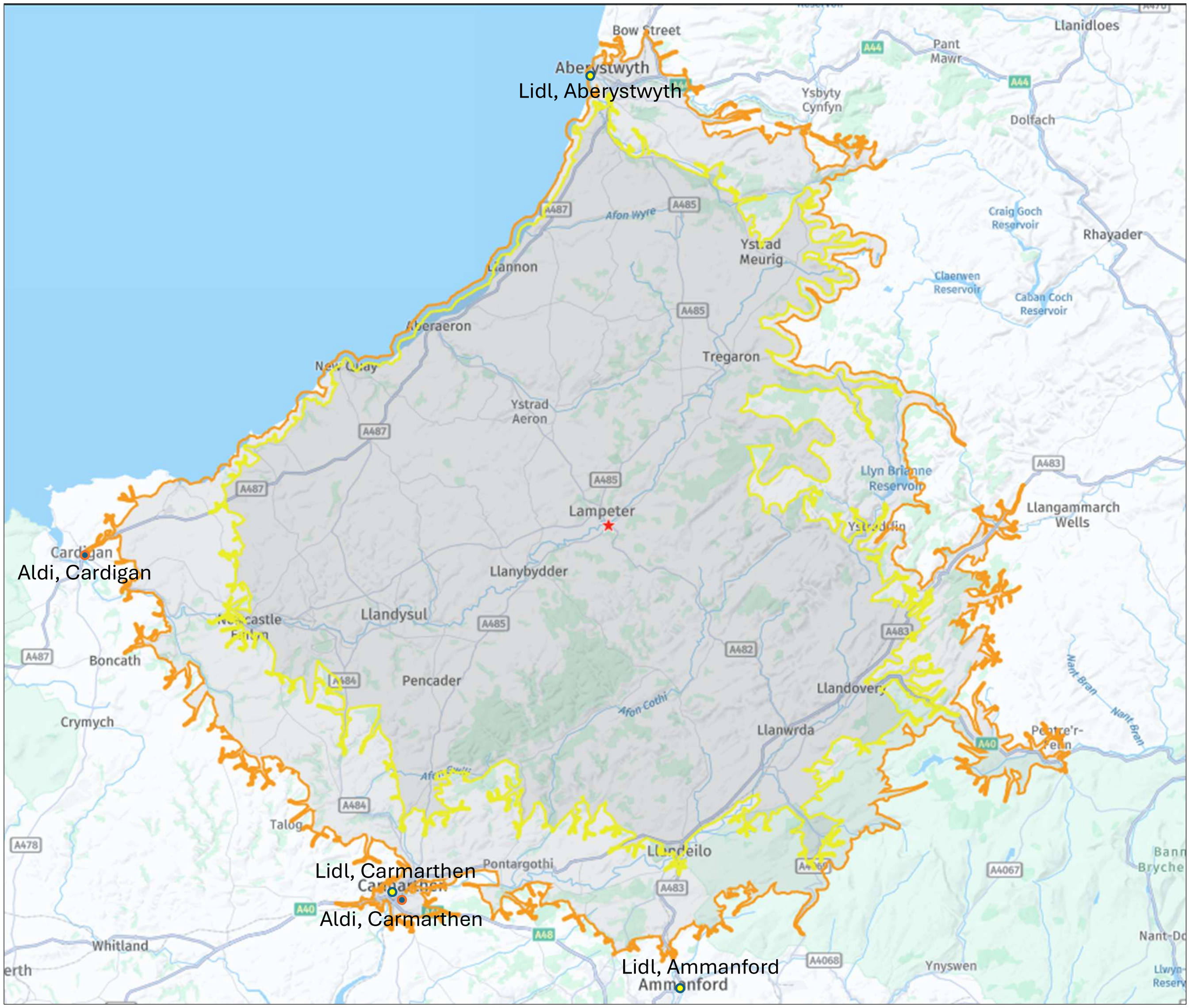
drawing title
Proposed GA Site Plan

date June 2026
status Planning
scale 1:500 @ A3
drawn NG checked BMS
job no. 3384 dwg no. P1403 rev.

CARNEYSWEENEY

Appendix B – Drive Time Plan

Nearest LAD format stores from application site



Legend:

Application Site

40 Minutes Off-Peak Drive Time

50 Minutes Off-Peak Drive Time

Lidl

Aldi

CARNEYSWEENEY

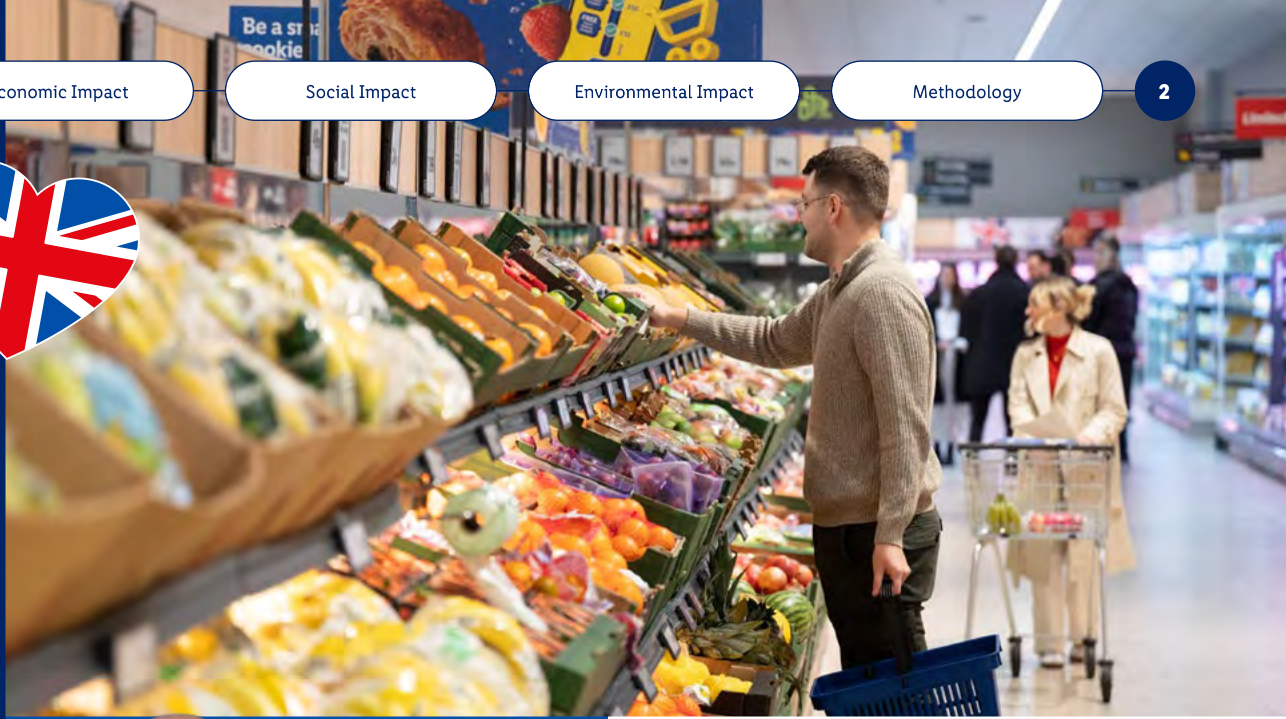
Appendix C – The 'Lidl Effect' Socio-Economic Impact Report (2024)

The Lidl Effect

FY24

Lidl GB's socioeconomic impact

A proud and major contributor to Britain



Ever since our first store opened in Great Britain in 1994, Lidl has stood for high-quality products at affordable prices – and much more besides.

We are proud to be a major British investor, creating high-quality jobs, offering support for British farmers and suppliers, contributing to local national tax revenues and meaningfully supporting the communities we serve. This is the **Lidl effect** – creating value beyond the price tag.

So as we open our 1000th GB store in 2025, we're not only celebrating another new Lidl, but the socioeconomic impact it will make.

Our new colleagues are joining a workforce of over 35,000 people of all ages, backgrounds, ethnicities and skills. The store's contribution will further add to the £14.5 billion in Gross Value Added (GVA) Lidl generated for the GB economy in 2024. The products it stocks will be more good news for British suppliers, who already supply around two-thirds of the products we sell.

It will also help to fund the vital work of the NSPCC and Childline, and work with organisations tackling food insecurity through Neighbourly and His Church. In 2024 alone, we donated 18.5 million meals through a combination of food surplus and customer donations, while continuing to invest in educational programmes and food redistribution initiatives nationally.

Fuelled by the passion of our colleagues and the trust of our customers, this report shows that the **Lidl effect** is not only significant – it's growing. And with each passing year, we're aiming higher, to help shape a brighter future for all our stakeholders.

Ryan McDonnell
CEO of Lidl GB

See our **Beyond the basket** report for more insights.

Certain metrics within this report have been independently assured by Forvis Mazars.
More details available within our Methodology section on page 11.

The Lidl effect in numbers

Adding value to the GB economy?

That's more to value

Our contribution included a
£474m[†]
investment in new stores and distribution centres.

£14.5bn

generated in Gross Value Added (GVA)
by Lidl and our supply chain, in 2024 alone.

A major job generator

From the stores we operate to the supply chain that supports us, Lidl's GB presence has generated **281,813 jobs.**

Backing Britain's producers

Around 2/3[†]
of all products sold are sourced directly from British suppliers.[*]

* Based on FY24 purchase value from British-based suppliers; includes own brand and branded core and promotional lines.
† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

Giving back

NSPCC
Making every child heard

Since 2017, we've raised
£10m
through our NSPCC partnership.

We also donate surplus food from our stores to help make good healthy food accessible to families who need support.

In 2024, we donated more than
18.5m meals[†]
through a combination of surplus food and customer donations, via Neighbourly and His Church. These meals supported a wide range of local causes including charities, food banks, community cafés and soup kitchens. Since 2020, we've increased our local distributions four fold.

Our £14.5bn economic impact

From Dingwall in the highlands of Scotland to Penzance in Cornwall, Lidl's GB-wide network of stores generates a considerable economic impact.

By championing British suppliers, creating high-quality job opportunities, and investing in retail operations and infrastructure across Great Britain, we make both a direct and indirect impact on the British economy.

Which break down like this:

£1.4bn†
in direct Gross Value Added (GVA) was generated by Lidl GB in 2024

£9.6bn
was created through our domestic suppliers

£3.5bn
was generated through international suppliers

Result: A total economic contribution of £14.5bn

How £1 becomes £10: the multiplier effect

For every £1 of direct value created by Lidl GB – through our own operations, investments and employment – the benefits ripple out and grow. Our British suppliers generate an additional £7, with a further £2 added across the wider value chain.

These figures reflect our broad impact and the role we play in supporting long-term economic development across Great Britain.

+£2 added across the wider value chain

+£7 generated by British suppliers

£1 direct value created by Lidl GB

Investment = commitment

We're investing at the heart of British communities to create economic impact and strengthen its ripple effect in the process.

In 2024, as part of our expansion in Great Britain, Lidl invested
£474m
in developing new stores and distribution centres, creating new jobs, supporting local suppliers and boosting local economies.

And in November 2025, we proudly opened our
1,000th
store, a landmark and symbol of our growth and commitment.

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

More than a retailer: a significant taxpayer

Lidl International and Lidl GB firmly believe that every responsible business must pay its fair share of tax, to fund vital public services such as the NHS, education, transport and state pensions.

In 2024, Lidl GB paid over £1 billion in taxes.† That's the equivalent of almost half of England's annual agricultural subsidies (£2.56 billion in 2024).

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

We paid over £1bn in taxes (FY24)

Lidl GB's tax contribution

2024: Lidl collected £335 million in taxes on behalf of the Government and paid £697 million in taxes.

As we grew our business in 2024, our contribution to National Insurance rose to £77.1 million (FY23: £63.4 million), giving further support to key public services.

Billions in backing for British farming

In 2024, Lidl GB invested:

£5.8bn
in British food and farmed products, with...

around 2/3
of products sourced directly from GB-based suppliers – significantly strengthening our British supplier network.*

We invested £5.8bn in British food and farmed products

And this is just the start. Over the next five years, Lidl has committed to investing a further
£30bn
in British food and farming!

Read more on Backing British Farming commitments here.

* Based on FY24 purchase value from British-based suppliers; includes own brand and branded core and promotional lines.

An employer of choice

Lidl strengthens the communities we serve, not only through our products and services, but as a large-scale, high-quality employer. Across Great Britain, we directly employ around 35,000 colleagues.†

Our colleagues are the backbone of our business, and their success is our success. Guided by our core values, we foster a culture rooted in fairness, respect and collaboration – and driven by open communication and mutual support.

Since becoming the first UK supermarket to provide a Living Wage in 2015,[1] we are committed to upholding our values. We now offer some of the highest entry wages in the sector, stable contracts and clear development pathways for everyone who chooses to join us.

We employ over **35,000** colleagues

1 Source: https://www.livingwage.org.uk/news/lidl-become-first-supermarket-pay-living-wage

We are guided by our values

Belonging

Performance

Trust

Grounded

Respect

6.84% year-on-year increase in our GB workforce†

Every role creates more

Lidl GB ranks in the top five Lidl countries by headcount, representing around 12% of the Company's global workforce.

We also benefit from the strength, expertise and network of the Schwarz Group. One of the world's largest retailers, they are also Europe's No. 1 in food retail.

In turn, our size means that positive socioeconomic impacts are amplified along the supply chain. For example, for every role at Lidl GB, five additional jobs are supported by our British-based direct suppliers. And when the broader value chain is factored in, this impact grows to as many as four additional roles sustained for each Lidl GB position.

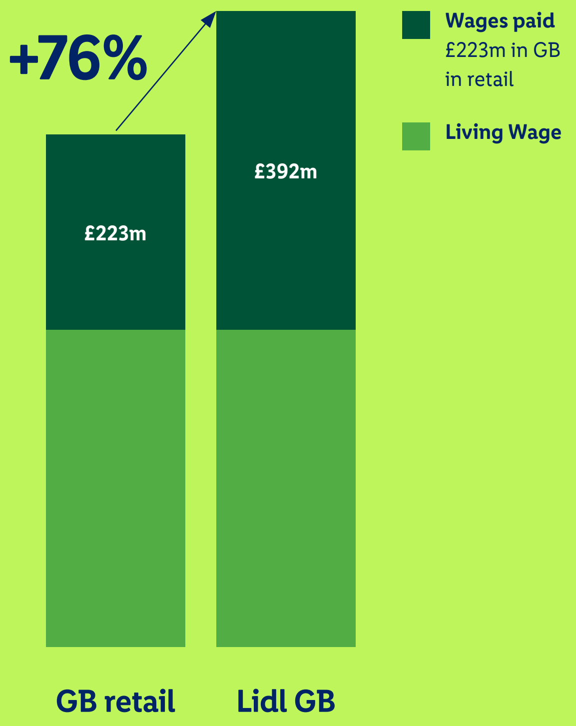
In all, our GB business sustains around 281,813 jobs across our direct operations and the wider supply network.

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

281,813 jobs supported from farm to factory

Competitive pay

We take our responsibility to colleagues seriously, and competitive pay is central to this commitment. For example, during FY24, this resulted in pay awards totalling £392 million above the UK Living Wage benchmark.



Mean gender pay gap: reduced

In 2024, we cut our mean pay gap to 8.0% – well below the UK average of 13.1%* – showing real progress towards fairer pay and equal opportunity.

* Source: ONS

Mean gender pay gap reduced to 8.0%

Median gender pay gap: (there isn't one)

Lidl GB's median gender pay gap remained at 0% for the fourth year in a row, highlighting our leadership in pay equity and commitment to fairness and equality.

For further information, see our Gender Pay Gap Report 24/25.

Median gender pay gap 0.0% for 4 years running

Fair wages: the foundation of our supply chains' success

Lidl GB believes fairness is fundamental to good business, and one example is the pioneering tool we are rolling out across our banana supply chain, to help close living wage gaps on plantations.

Developed with the Sustainable Trade Initiative (IDH), it identifies the gap to local living wages, calculates Lidl's share of extra payments due, and empowers suppliers to pass this on through wages, bonuses or vouchers.

See our Beyond the basket report for the full story.

Community food insecurity: we're on it

For many, affording good, healthy food is a constant challenge – and Lidl GB is committed to being part of the solution.

In 2024, we donated 18.5 million meals for 6.8 million people via Neighbourly and His Church. This is broken down as 16.6 million meals from our food surplus and 1.96 million meals from our customers 'Good To Give' food donations.

The Neighbourly donations:

Represent food worth around

£31.9m

Saved almost

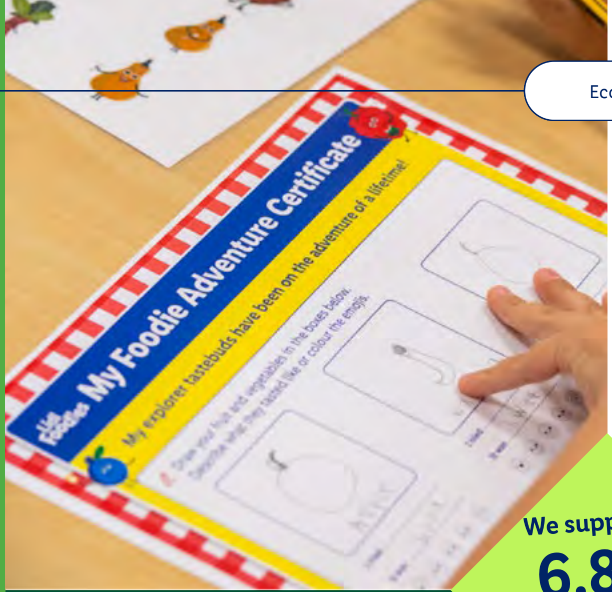
28,465 tCO_2e

emissions related to food waste

Helped to reduce incremental costs to the NHS by an estimated

£79.5m*†

* £79.5 million is the estimated FY24 social value figure for Lidl GB's edible product redistribution programme, calculated by Neighbourly based on data, evidence and financial proxies assured by CHY Consultancy. Based in part on a report by BAPEN, the figure reflects the estimated prevention of additional costs to the NHS for subjects with malnutrition and obesity as a result of the meals donated.



We supported 6.8m people through healthy meal donations

Discovering healthy – early

Lidl has invested £500,000 over two years in Lidl Foodies, a nationwide schools programme designed to spark a lifelong love of healthy eating. Delivered by teachers through fun, hands-on workshops, the initiative brings fruit and vegetables to life for primary school children across the UK. The programme is completely free for schools and aims to reach 250,000 pupils. By the end of FY24, over 150,000 children from 1,000 schools had already taken part – with more than half coming from Schools in Need. We're here to 'Vegucate' the nation and make healthy food exciting, accessible and enjoyable for every child.

Partnering for impact

Through Neighbourly – a platform connecting our stores to over 2,800 good causes nationally – His Church, and initiatives such as the Lidl Community Fund, toy giveaways and our Lidl Foodies education programme, we reduce waste and help families towards healthier futures.

18.5m
meals donated

£2.08m
generated through fundraising

£599,429
in grants for 688 causes supported

85,000
toys donated

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

Charity partnering

The vital priorities of the safety, mental health and wellbeing of Britain's children, and the success to date of our work with the NSPCC, led us to an important decision in 2025: we decided to extend our partnership with Britain's leading youth charity for another five years.

In 2024 alone...

£2m†

was raised by our colleagues and customers to give a vital boost to the NSPCC's funding and ability to protect vulnerable children, right across the country.

To date...

£10m

has been invested to support thousands of children. And our renewed commitment will ensure this vital work continues well into the future.

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

Our donations funded...

13

Childline bases around the UK, supported through Lidl, and the entirety of Childline's night time service

38,302

counselling sessions with young people, delivered by Childline

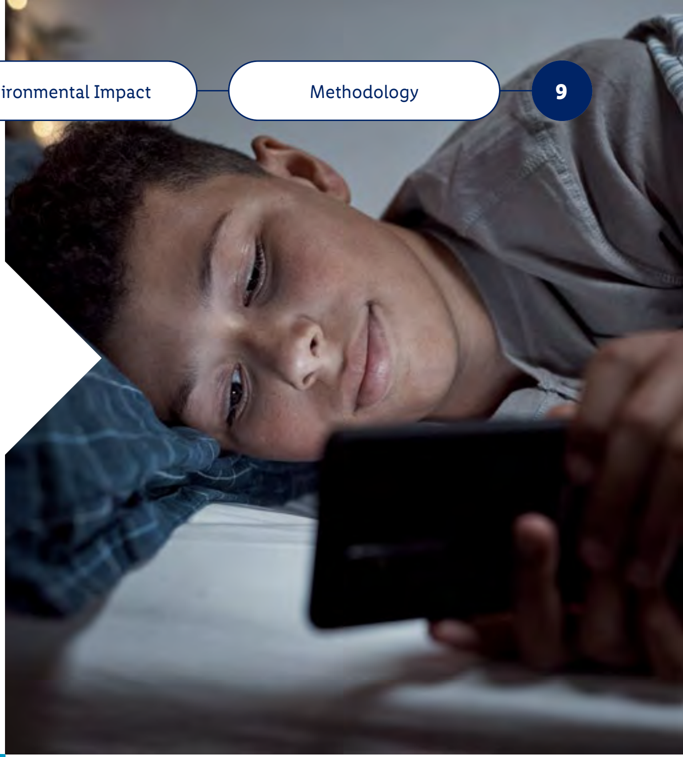
1,452

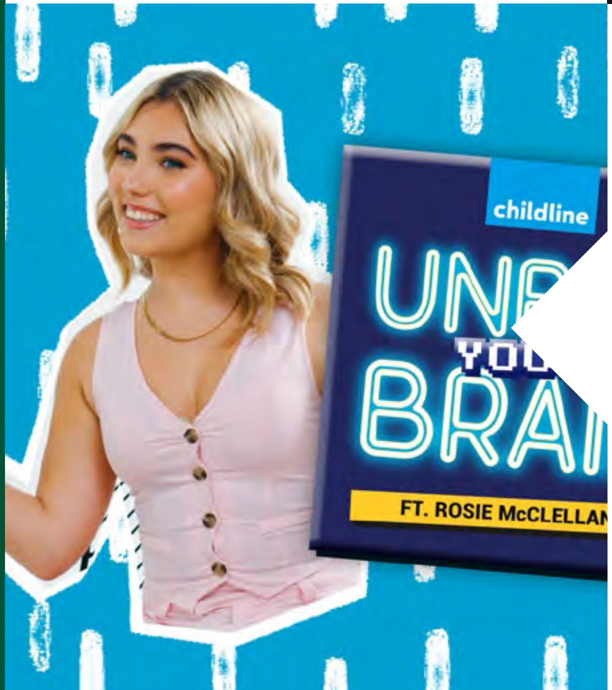
initial assessments for young people who needed additional support

Childline counselling: there when it's needed

Lidl's support enables tens of thousands of Childline's counselling sessions for children and young people.

Childline is in constant demand: on average, it receives a call every 45 seconds, usually from children who need help with their mental health and emotional wellbeing. Our partnership helps to make sure they have someone to turn to – whatever difficulty they're facing, 24/7.





Unbox Your Brain campaign

Social media is a wonderful thing – until it isn't. There is a lot of misleading, and potentially harmful, mental health content on social media platforms like TikTok. Lidl therefore funded a nationwide campaign, aimed at reaching young people with sound and reliable advice. By engaging influencers and using creative formats, we directly address one of the biggest risks to young people's mental health: exposure to harmful digital content.

NSPCC Making every child heard

More impact, through less impact

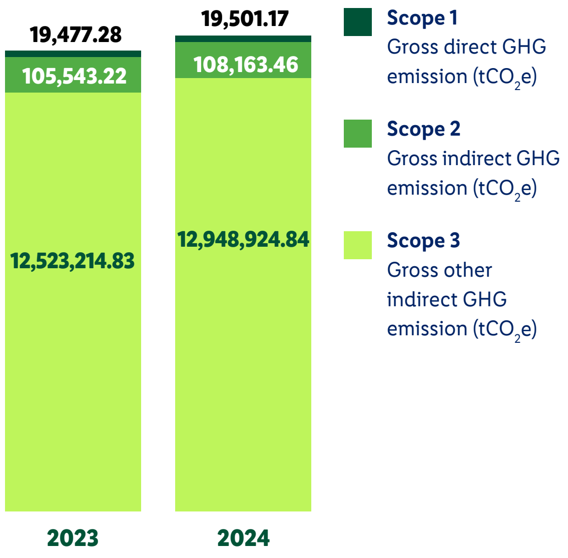
Our bold environmental reduction goals

In line with our parent Schwarz Group's official net zero commitment to the Science Based Targets initiative (SBTi), Lidl has defined a clear long-term climate strategy. By 2030, we aim to cut our operational emissions (Scope 1 and 2) by 70% against a 2019 baseline – a decisive move towards meaningful environmental impact and corporate responsibility.

With 13.1 million tCO_2e greenhouse gases emitted in 2024, our increased carbon footprint reflects the scale and growth of our operations – and the responsibility that comes with it. We took targeted steps in 2024 to strengthen our climate strategy, reducing future emissions and increasing our positive societal impact over time. That's why we're driving change across all three scopes – from our own operations, to the energy we source, to the suppliers we work with.

Find out more on our website and in our latest Sustainability Report.

Greehouse gas (GHG) emissions



The mission to cut emissions

- Our largest warehouse, opened in Luton in 2023, is powered by biogas and solar PVs, covering electricity needs seasonally.
- We eased freezer temperatures from -24°C to -22°C (Oct 2024 – March 2025), cutting warehouse freezer power use by ~9% a year.
- Lidl GB significantly expanded its Battery Electric Vehicle (BEV) fleet by 16% between FY23 and FY24 by making more BEV options available to colleagues.

CO_2 is just the start

National Insights

£1.75m
biodiversity net gain payments

7,883t
food waste avoided through surplus redistribution and operational efficiency measures

£11.8m
towards improving recycling infrastructure through Packaging Recovery Notes (PRNs)

94.6%
of our own-label and branded product packaging that is recyclable, reusable, refillable or renewable*

541,312 MWh
energy saved through efficiency measures

See our **Beyond the basket** report for more insights

* Based on % tonnage of packaging that is eligible to carry on pack recycling label 'recyclable' or 'recycle at collection point' logo

Methodology

Sources of information

This report's analysis draws primarily on Lidl's internal datasets, including store-level sales, payroll for stores, offices and distribution centres, procurement from domestic and international suppliers, and operational indicators such as greenhouse gas emissions, food waste and energy consumption. Tax contribution figures were taken from Lidl's most recent Annual Report and Financial Statements 2024.

Internal data was validated and supplemented with publicly available macroeconomic data sources. Supplier records were mapped to economic sectors, and macroeconomic datasets (including multi-regional input/output tables, the Business Register and Employment Survey, and labour market statistics) were integrated into the analysis.

Scope of data reporting

The data in this report differs from the data in Lid GB's Financial Statement and Sustainability Report as the Socioeconomic Report encompasses the following two legal entities:

- Lidl GB (LGB) – retailing grocery products in Great Britain
- Lidl UK Trading (LUKT) – facilitating the purchase of goods from overseas and the subsequent sale to Lidl GB.

Gross Value Added (GVA)

The economic impact assessment is based on two components: direct and indirect Gross Value Added (GVA):

- Direct impact reflects the GVA created through Lidl's own activities, including demand for goods and services sold in stores and online, measured through the income approach – aggregating compensation of employees, gross operating surplus (profits plus capital consumption via depreciation and amortisation), and taxes on production. Direct GVA is calculated nationally from Lidl's Annual Report and locally from store sales.
- Indirect impact captures the global effects generated through Lidl's procurement from GB and international suppliers and their supply chains. This covers purchases for resale as well as goods and services acquired to support operations. Supplier data is mapped to sector and location, and multi-regional multipliers are applied to estimate additional GVA across the global economy. The report excludes induced GVA and employment effects, and includes only procurement-based indirect impacts, ensuring verifiable data that safeguards credibility, transparency and compliance.

Employment

The employment impact assessment considers both direct and indirect effects.

Direct employment represents the jobs provided by Lidl itself across stores, offices and distribution centres. Indirect employment reflects additional jobs supported in Lidl's GB and international supply chains through the Company's procurement of goods and services. To quantify these impacts, employment multi-regional impact multipliers were applied to estimate the additional jobs created across the global economy.

Living wages & gender pay gap

The methodology compares actual wages with locally defined living wages and measures the gender pay gap as the average earnings difference between men and women, following national law.

The mean gender pay gap is measured by taking the difference between average hourly earnings (excluding overtime) of men and women, as a proportion of men's average hourly earnings. The median gap is calculated by taking the midpoint of the highest and lowest hourly pay in the organisation, and comparing the respective midpoints paid to men and women.

Direct effects are based on internal data, while indirect effects are estimated through sector- and country-level wage allocations, using multi-regional impact multipliers. All employees are adjusted to full-time equivalents.

Methodology continued

Environmental data

Environmental indicators are measured using Lidl's internal reporting systems, which track (food) waste, energy use, water consumption and greenhouse gas emissions across operations. Data is collected through monitoring and supplier reporting, and then aggregated and validated against national standards.

Indirect (upstream) impacts are estimated through carbon accounting methods according to the GHG Protocol or by applying multi-regional impact multipliers.

Benchmarking

Benchmarks are established in several ways. In most cases, when referencing a typical competitor or statistical baseline, this involves constructing a hypothetical company of comparable size (measured by production value, GVA or full-time-employees) operating in the same market and year, with results calculated using respective multi-regional impact multipliers.

Neighbourly

Through our partnership with Neighbourly, we capture and report on a range of induced social impacts, including meals redistributed, funds raised, toys donated and community grants delivered. In addition, financial impacts such as estimated NHS savings are calculated using recognised sources and programmes, including the Waste and Resources Action Programme (WRAP) and the British Association for Parenteral and Enteral Nutrition (BAPEN).

TCO_2e per meal calculation: Each of the food catalogue items has its average tray weight and average CO_2 per tray. For food catalogue items in general 1kg item weight ~ 3.611kg CO_2 (which is based on the average saving of 3,611kg CO_2 e per tonne from diverting food surplus away from anaerobic digestion), e.g. Fruit & Veg weight is 5kg per tray, CO_2 is 18.055kg per tray. Our estimated tray size: 58cm(l), 40cm(w), 15cm(h).

NSPCC

Through our partnership with the NSPCC, impacts are measured in terms of access to child protection services, counselling, and safeguarding support delivered via programmes such as Childline. Data provided by the NSPCC is used to capture outcomes such as improved mental health support and community resilience, while in-kind donations and colleague fundraising are included to reflect the wider social value of the collaboration.

WRAP

The estimated money saving from food donations is based on WRAP analysis of the DEFRA Family Food Survey, using the total per-person expenditure and weight of food purchased to derive the price-per unit. The scope used is the total household food purchases, excluding takeaway food. This excludes drinks and milk. For estimating the price-per unit in 2022, the most recent available Family Food estimates were adjusted using Consumer Price Index food figures. The weight of a meal is assumed to be 420g. The figure is rounded.

Limitations

Input/output modelling is the standard method for estimating the wider economic and employment effects of company activities, but it carries certain limitations.

The input/output tables provide only a static view of the economy for a given year; in this analysis, 2023 tables were used and adjusted for inflation to present values.

The approach measures the gross value added and employment supported by Lidl's operations but does not include a counterfactual scenario of how spending might be redistributed in the absence of Lidl.

Supplier classification may also create uncertainty, as sector codes do not always capture the full scope of a supplier's activities.

As with any large-scale modelling exercise, results are subject to data quality constraints and should be interpreted as indicative estimates rather than exact figures.

Assurance

Certain metrics within this Report have been independently assured by Forvis Mazars.

† This symbol denotes where a KPI has undergone limited assurance. The full assurance statement is available here: https://corporate.lidl.co.uk/sustainability/sustainability-reports

CARNEYSWEENEY

Appendix D – Statistical tables

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 1: Population

Zone	2025	2026	2027	2028	2029	2030	Change 2025-2030	
							No.	%
	[1]					[2]	[3]	[4]
Zone 1 PCA	11,397	11,396	11,395	11,379	11,376	11,384	-13	-0.1
Zone 2	4,908	4,914	4,909	4,909	4,904	4,915	7	0.1
Zone 3	4,136	4,138	4,125	4,128	4,127	4,127	-9	-0.2
Zone 4	8,013	8,001	7,973	7,950	7,927	7,910	-103	-1.3
Zone 5	10,928	10,912	10,903	10,889	10,871	10,842	-86	-0.8
Total	39,382	39,361	39,305	39,255	39,205	39,178	-204	-0.5

Notes:

Population projections obtained from Experian Location Analyst Report

[3] = [2] - [1]

[4] = [3] / [1]%

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 2: Convenience goods expenditure (per capita)(£) (exc SFT)

Zone	2025	2026	2027	2028	2029	2030
Zone 1	3,148	3,126	3,108	3,095	3,083	3,070
Zone 2	3,277	3,254	3,234	3,221	3,209	3,196
Zone 3	3,314	3,291	3,271	3,258	3,245	3,232
Zone 4	3,355	3,332	3,312	3,299	3,285	3,272
Zone 5	3,294	3,271	3,252	3,239	3,226	3,213

Notes:

per capita figures sourced from from Experian Location Analyst report data

Excludes SFT in line with Fig 5 of EXRPBN 22 (Mar 2025)

subsequent years projected forward in accordance with growth rates set out in App 3 of EXRPBN 22 (adj. for SFT (sales via stores))

Table 3: Comparison goods expenditure (per capita)(£) (exc SFT)

Zone	2025	2026	2027	2028	2029	2030
Zone 1	3,100	3,128	3,169	3,232	3,304	3,376
Zone 2	3,262	3,291	3,334	3,400	3,475	3,552
Zone 3	3,218	3,247	3,289	3,355	3,429	3,504
Zone 4	3,316	3,346	3,389	3,457	3,533	3,611
Zone 5	3,253	3,282	3,324	3,391	3,466	3,542

Notes:

per capita figures sourced from Experian Location Analyst data

Excludes SFT in line with Fig 5 of EXRPBN 22 (Mar 2025)

subsequent years projected forward in accordance with growth rates set out in App 3 of EXRPBN 22 (adj. for SFT (sales via stores))

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 4a: Total Convenience Goods Expenditure, 2025-2030 (£m)

Zone	2025	2026	2027	2028	2029	2030	Change 2025-2030	
							£m	%
	[1]					[2]	[3]	[4]
Zone 1 PCA	35.9	35.6	35.4	35.2	35.1	35.0	-0.9	-2.6
Zone 2	16.1	16.0	15.9	15.8	15.7	15.7	-0.4	-2.3
Zone 3	13.7	13.6	13.5	13.4	13.4	13.3	-0.4	-2.7
Zone 4	26.9	26.7	26.4	26.2	26.0	25.9	-1.0	-3.7
Zone 5	36.0	35.7	35.5	35.3	35.1	34.8	-1.2	-3.2
Total	**128.6**	**127.6**	**126.6**	**126.0**	**125.3**	**124.7**	**-3.8**	**-3.0**

Notes:
[1] & [2] Derived by multiplying the population (Table 1) with expenditure per capita per zone (Table 2).
[3] = [2] - [1]
[4] = [3]%

Table 4b: Total main food shopping expenditure (£m)

Zone	2025	2026	2027	2028	2029	2030
Zone 1 PCA	26.4	26.2	26.1	25.9	25.8	25.8
Zone 2	12.9	12.8	12.7	12.7	12.6	12.6
Zone 3	11.5	11.4	11.3	11.3	11.3	11.2
Zone 4	22.9	22.7	22.5	22.3	22.2	22.1
Zone 5	28.8	28.5	28.3	28.2	28.0	27.8
Total	**102.5**	**101.7**	**101.0**	**100.4**	**99.9**	**99.42**

Notes:
Proportion of expenditure on main food shopping derived from the mean weekly expenditure for each zone

Table 4c: Total top up food shopping expenditure (£m)

Zone	2025	2026	2027	2028	2029	2030
Zone 1 PCA	9.4	9.4	9.3	9.3	9.2	9.2
Zone 2	3.2	3.2	3.2	3.1	3.1	3.1
Zone 3	2.2	2.2	2.2	2.1	2.1	2.1
Zone 4	4.0	3.9	3.9	3.9	3.9	3.8
Zone 5	7.2	7.2	7.1	7.1	7.1	7.0
Total	**26.1**	**25.9**	**25.7**	**25.5**	**25.4**	**25.3**

Notes:
Proportion of expenditure on top up food shopping derived from the mean weekly expenditure for each zone

2023 prices

Table 5a: Total Comparison Goods Expenditure, 2025-2030 (£m)

Zone	2025	2026	2027	2028	2029	2030	Change 2025-2030	
							£m	%
					[2]		[3]	[4]
Zone 1 PCA	35.3	35.7	36.1	36.8	37.6	39.3	3.9	11.2
Zone 2	16.0	16.2	16.4	16.7	17.0	17.8	1.8	11.4
Zone 3	13.3	13.4	13.6	13.8	14.2	14.8	1.5	11.0
Zone 4	26.6	26.8	27.0	27.5	28.0	29.2	2.6	9.9
Zone 5	35.5	35.8	36.2	36.9	37.7	39.2	3.7	10.4
Total	**126.8**	**127.8**	**129.3**	**131.7**	**134.5**	**140.3**	**13.6**	**10.7**

Notes:
[1] & [2] Derived by multiplying the population (Table 1) with expenditure per capita per zone (Table 2).
[3] = [2] - [1]
[4] = [3]%

Table 5b: Total Comparison Expenditure per capita 2025 (£m) (Ex SFT)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Clothing & Footwear	8.2	3.6	3.1	6.3	8.2
Furniture & Floor Coverings	1.8	0.8	0.6	1.3	1.8
DIY, Decorating & Gardening	3.4	1.7	1.4	2.6	3.5
Electrical	3.7	1.6	1.4	2.8	3.6
Small Household	6.2	3.0	2.4	4.7	6.4
Recording Media & Books	3.0	1.2	1.1	2.3	2.8
Chemist	3.7	1.7	1.4	2.7	3.8
Recreation	5.3	2.5	1.9	3.9	5.5
Total Comparison	35.3	16.0	13.3	26.6	35.5

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 6: Convenience shopping patterns, %

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Main	TU	Main	TU	Main	TU	Main	TU	Main	TU
Zone 1										
Bara Gwalia, Llanybydder, SA40 9UE		1.0%								
Co-op, Bridge Street, Lampeter, SA48 7AF	15.3%	31.2%	8.6%	11.0%	5.0%	0.6%				0.9%
Costcutter, Pentre-bach, Lampeter, SA48 7JR		0.4%								
Costcutter, Ystrad Garage, Felinfach, Lampeter, SA48 8AE		0.7%						0.5%		1.3%
Local shops, Lampeter Town Centre		8.6%						0.8%		
Mark Lane Bakery & Café, Bridge Street, Lampeter, SA48 7HG				2.8%						
Mulberry Bush Wholefoods, Bridge Street, Lampeter, SA48 7HG			0.4%	1.4%						
Nisa, Post Office, Rhiw San Pedr, Llanybydder, SA40 9XP		1.1%		1.0%						
Premier, High Street, Lampeter, SA48 7BG		2.8%								
Sainsbury's, Market Street, Lampeter, SA48 7DS	56.8%	33.5%	36.8%	14.9%	24.5%	4.3%	8.3%	3.4%	6.0%	4.3%
Siop y Bont, Bridge Street, Llanybydder, SA40 9XY		1.4%		1.0%		3.2%				
Watson & Pratt's, Industrial Estate, Tregaron Road, Lampeter, SA48 8LT		2.8%		1.0%						
Zone 2										
Checkpoint Garage, Harford, Llanwrda, SA19 8DT			0.7%	1.0%						
Cwmdu Inn, Shop & Post Office, Cwmdu, Llandeilo, SA19 7DY			0.4%							
Local shops, Llanwrda Village Centre			0.4%							
Nisa Local, Harford, Llanwrda, SA19 8DT				1.4%						
Village Shop and Coffee, Talley Road, Llandeilo, SA19 7YP				5.6%						
Zone 3										
Caffe A Siop, Village Square, Llangeitho, Tregaron, SY25 6TL			0.4%			10.8%				
Caron Groceries, Station Road, Tregaron, SY25 6HX					3.6%	13.3%				
Local shops, Pontrhydfendigaid Village Centre						1.7%				
New Medical Hall, Station Road, Tregaron, SY25 6HU					0.9%					
Riverbank Café and Farm Shop, Tregaron, SY25 6QS						0.6%				
Siop y Bont, Bridge Street, Pontrhydfendigaid, Ystrad Meurig, SY25 6EE					0.5%	8.3%				
Spar, Rhydyronnen, Tregaron, SY25 6JL					0.5%	38.5%				
Zone 4										
Costcutter, Llanrhystud Service Station, Llanrhystud, SY23 5BT								4.5%		
Costcutter, Market Street, Aberaeron, SA46 0AS	0.6%	3.9%				1.1%	3.1%	34.0%	0.4%	2.2%
Costcutter, Uplands Square, New Quay, SA45 9QH							1.5%	6.3%		0.5%
Glenarthen Stores, Cross Inn, Llanon, SY23 5NB						1.1%		3.2%		1.6%
Local shops, Aberaeron Town Centre		0.7%								
Local shops, Llwyncelyn Village Centre								1.8%		
Local shops, New Quay Town Centre								0.5%		
Londis, Llwyncelyn, Aberaeron, SA46 0HF								0.9%		
Morrisons Daily, Forge Industrial Park, Aberaeron, SA46 0HA	1.2%	1.4%					2.3%	9.9%		1.3%
Premier, London House, Llanon, SY23 5HG								6.6%		
Premier, Pont Llethi, Llanarth, SA47 0NE								4.3%		
Watson & Pratt's, Bridge Street, Aberaeron, SA46 0AP								0.9%		
Ydfa Health Food Store, Victoria Street, Aberaeron, SA46 0AS								0.9%		
Zone 5										
CK's Supermarket, Pencader Road, Pontwelly, Llandysul, SA44 4AE	0.5%	0.6%		1.7%					5.6%	19.3%
Local shops, Brynhoffnant Village Centre										0.5%
Londis, North Cardigan, Brynhoffnant, Llandysul, SA44 6ED										6.2%
Londis, Pencnwc Isaf, Cross Inn, Llandysul, SA44 6NL								0.5%		
Morrisons Daily, Gwalia House, Felindre, Carmarthen, SA44 5UG										1.4%
Nisa Extra, Pencader Road, Pontwelly, Llandysul, SA44 4AE									0.4%	4.2%
Premier (JJ Stores), Storfa, Ffostrasol, Llandysul, SA44 4SY										0.5%
Siop y Pentref, Cross Inn, New Quay, SA44 6NL										0.5%
Spar, Lincoln Street, Llandysul, SA44 4BU									2.9%	24.6%
Y Pantri Bach, Drefach, Felindre, Llandysul, SA44 5UG									0.7%	1.4%
Outside Survey Area										
Aldi, Aberystwyth Road, New Town, Cardigan, SA43 1NA	1.3%						11.8%	1.0%	14.6%	0.9%
Aldi, Llandeilo Road, Cross Hands, Llanelli, SA14 6RD			2.1%	1.4%			0.8%			
Aldi, Stephens Way, Carmarthen, SA31 2BG	8.2%	1.8%	5.5%	1.0%					14.2%	0.5%
B&M, Hall Street, Carmarthen, SA31 1PH			0.7%							
B&M, Parc y Llyn Retail Park, Llanbadarn Fawr, Dyfed, SY23 3TL						0.6%				
Bailey L J & Sons, Church Street, Llangadog, SA19 9AA				0.5%						
CK Foodstores, Kings Road, Llandovery, SA20 0AN				1.7%						
CK Supermarket, Gogerddan Garage, Tan-y-groes, Cardigan, SA43 2HP										1.9%
CK's Foodstores, Waun Fawr, Aberystwyth, SY23 3QH								1.8%		
CK's Supermarket, Rhosmaen Street, Llandeilo, SA19 6HD			2.2%	4.2%						
CK's Supermarket, Station Road, Newcastle Emlyn, SA38 9BX									0.4%	1.4%
Co-op, High Street, Llandovery, SA20 0RA			6.7%	6.4%						
Co-op, New Road, Newcastle Emlyn, SA38 9BA									1.5%	1.9%
Co-op, Rhosmaen Street, Llandeilo, SA19 6LU			2.8%	30.9%						1.9%
Co-op, Station Road, St Clears, Carmarthen, SA33 4DG										2.0%
Crwst, Bridge Street, Newcastle Emlyn, SA38 9DU										0.5%
Farmfoods, Heol Stanllyd, Cross Hands Retail Park, Cross Hands, SA14 6RB			0.4%							
Farmfoods, Stephens Way, Pensarn, Carmarthen, SA31 2NG			2.0%						0.7%	
Hugh Evans & Son, Rhosmaen Street, Llandeilo, SA19 6HA				1.4%						
Iceland (The Food Warehouse), Stephens Way, Carmarthen, SA31 2BG	0.6%		0.8%						2.4%	1.0%
Iceland, Rhydal Retail Park, Station Road, Aberystwyth, SY23 1LL					0.9%		1.5%	1.4%		0.9%
Lidl, Cross Hands, Llanelli, SA14 6SY			1.7%	2.8%						
Lidl, Foundry Road, Ammanford, SA18 2LS			2.7%	1.5%						
Lidl, Friars Park, Carmarthen, SA31 3FF		2.4%	4.8%				0.4%		3.3%	
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL	2.0%	1.9%			8.6%		15.6%	0.9%		
Local shops, Llandovery Town Centre								0.9%		
Local shops, Llangadog Village Centre				1.5%						
London House Stores, Aberporth, Cardigan, SA43 2EU							0.8%	0.9%		
Maeth Y Meysydd, Chalybeate Street, Aberystwyth, SY23 1HX					0.9%	1.1%				
Marks and Spencer (M&S), Kingsland High Street, Carmarthen, SA31 1RS		1.5%	1.1%	0.5%				0.8%	1.1%	4.1%
Marks and Spencer (M&S), Park Avenue, Aberystwyth, SY23 1PB			2.5%	1.7%		0.6%	5.0%	0.9%	1.5%	
Morrisons Daily, Carmarthen Road, Fforest-fach, Swansea, SA5 8HR								0.9%		
Morrisons Daily, Manchester House, Carmarthen, SA38 9AJ	1.5%									1.9%
Morrisons, Parc Pensarn, Carmarthen, SA31 2NF		0.4%	2.4%	1.0%					3.0%	0.5%
Morrisons, Parcydolau, Aberystwyth, SY23 3TL	4.4%	1.5%			33.6%	6.2%	16.9%	2.8%	0.4%	
Morrisons, Park Road, Abergavenny, NP7 5TP			0.4%							
Tesco Express, North Parade, Aberystwyth, SY23 2JN							3.8%	1.8%		
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen, SA31 3AX	5.9%	0.4%	9.6%	0.5%	0.8%	1.0%	2.6%		23.5%	5.6%
Tesco Extra, Pontardulais Road, Cadle, Fforest-fach, Swansea, SA5 4BA			0.4%							
Tesco Superstore, Aberystwyth Road, New Town, Cardigan, SA43 1NA	1.3%						9.0%		16.7%	3.2%
Tesco Superstore, Park Avenue, Aberystwyth, SY23 1PB	0.3%				20.3%	4.2%	16.6%	6.9%	1.0%	
Tesco Superstore, Park Street, Ammanford, SA18 2LR			3.8%							
The Village Shop, Towy Terrace, Ffairfach, Llandeilo, SA19 6ST						3.2%				1.3%
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes
taken from NEMS household survey - Main (Q1&Q1) Top Up (Q14&Q22)
Exc Nulls, SFT

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 7: Convenience Turnover of Existing facilities, 2025 (£m)

Destination	Zone 1			Zone 2			Zone 3			Zone 4			Zone 5			Total
	Main	TU	Sub Total	Main	TU	Sub Total	Main	TU	Sub Total	Main	TU	Sub Total	Main	TU	Sub Total	(£m)
Zone 1																
Bara Gwalia, Llanybydder, SA40 9UE		0.1	0.1													0.1
Co-op, Bridge Street, Lampeter, SA48 7AF	4.1	2.9	7.0	1.1	0.4	1.5	0.6	0.0	0.6					0.1	0.1	9.1
Costcutter, Pentre-bach, Lampeter, SA48 7JR		0.03	0.03													0.03
Costcutter, Ystrad Garage, Felinfach, Lampeter, SA48 8AE		0.1	0.1								0.02	0.02		0.1	0.1	0.2
Local shops, Lampeter Town Centre		0.8	0.8								0.03	0.03				0.8
Mark Lane Bakery & Café, Bridge Street, Lampeter, SA48 7HG					0.1	0.1										0.1
Mulberry Bush Wholefoods, Bridge Street, Lampeter, SA48 7HG				0.0	0.0	0.1										0.1
Nisa, Post Office, Rhiw San Pedr, Llanybydder, SA40 9XP		0.1	0.1		0.0	0.0										0.1
Premier, High Street, Lampeter, SA48 7BG		0.3	0.3													0.3
Sainsbury's, Market Street, Lampeter, SA48 7DS	15.0	3.2	18.2	4.7	0.5	5.2	2.8	0.1	2.9	1.9	0.1	2.0	1.7	0.3	2.0	30.4
Siop y Bont, Bridge Street, Llanybydder, SA40 9XY		0.1	0.1		0.0	0.0		0.1	0.1							0.2
Watson & Pratt's, Industrial Estate, Tregaron Road, Lampeter, SA48 8LT		0.3	0.3		0.0	0.0										0.3
Zone 2																
Checkpoint Garage, Harford, Llanwrda, SA19 8DT				0.1	0.0	0.1										0.1
Cwmdu Inn, Shop & Post Office, Cwmdu, Llandeilo, SA19 7DY				0.0		0.0										0.0
Local shops, Llanwrda Village Centre				0.0		0.0										0.0
Nisa Local, Harford, Llanwrda, SA19 8DT					0.0	0.0										0.0
Village Shop and Coffee, Talley Road, Llandeilo, SA19 7YP					0.2	0.2										0.2
Zone 3																
Caffe A Siop, Village Square, Llangeitho, Tregaron, SY25 6TL				0.0		0.0		0.2	0.2							0.3
Caron Groceries, Station Road, Tregaron, SY25 6HX							0.4	0.3	0.7							0.7
Local shops, Pontrhydfendigaid Village Centre								0.0	0.0							0.04
New Medical Hall, Station Road, Tregaron, SY25 6HU							0.1		0.1							0.1
Riverbank Café and Farm Shop, Tregaron, SY25 6QS								0.0	0.0							0.01
Siop y Bont, Bridge Street, Pontrhydfendigaid, Ystrad Meurig, SY25 6EE							0.1	0.2	0.2							0.2
Spar, Rhydyronnen, Tregaron, SY25 6JL							0.1	0.8	0.9							0.9
Zone 4																
Costcutter, Llanrhystud Service Station, Llanrhystud, SY23 5BT											0.2	0.2				0.2
Costcutter, Market Street, Aberaeron, SA46 0AS	0.2	0.4	0.5					0.0	0.0	0.7	1.4	2.1	0.1	0.2	0.3	2.9
Costcutter, Uplands Square, New Quay, SA45 9QH										0.3	0.2	0.6		0.0	0.0	0.6
Glenarthen Stores, Cross Inn, Llanon, SY23 5NB								0.0	0.0		0.1	0.1		0.1	0.1	0.3
Local shops, Aberaeron Town Centre		0.1	0.1													0.1
Local shops, Llwyncelyn Village Centre											0.1	0.1				0.1
Local shops, New Quay Town Centre											0.0	0.0				0.02
Londis, Llwyncelyn, Aberaeron, SA46 0HF											0.0	0.0				0.0
Morrisons Daily, Forge Industrial Park, Aberaeron, SA46 0HA	0.3	0.1	0.4							0.5	0.4	0.9		0.1	0.1	1.5
Premier, London House, Llanon, SY23 5HG											0.3	0.3				0.3
Premier, Pont Llethi, Llanarth, SA47 0NE											0.2	0.2				0.2
Watson & Pratt's, Bridge Street, Aberaeron, SA46 0AP											0.0	0.0				0.04
Ydfa Health Food Store, Victoria Street, Aberaeron, SA46 0AS											0.0	0.0				0.04
Zone 5																
CK's Supermarket, Pencader Road, Pontwelly, Llandysul, SA44 4AE	0.1	0.1	0.2		0.1	0.1							1.6	1.4	3.0	3.3
Local shops, Brynhoffnant Village Centre														0.0	0.0	0.0
Londis, North Cardigan, Brynhoffnant, Llandysul, SA44 6ED														0.5	0.5	0.5
Londis, Pencnwc Isaf, Cross Inn, Llandysul, SA44 6NL											0.0	0.0				0.02
Morrisons Daily, Gwalia House, Felindre, Carmarthen, SA44 5UG														0.1	0.1	0.1
Nisa Extra, Pencader Road, Pontwelly, Llandysul, SA44 4AE													0.1	0.3	0.4	0.4
Premier (JJ Stores), Storfa, Ffostrasol, Llandysul, SA44 4SY														0.0	0.0	0.0
Siop y Pentref, Cross Inn, New Quay, SA44 6NL														0.0	0.0	0.0
Spar, Lincoln Street, Llandysul, SA44 4BU													0.8	1.8	2.6	2.6
Y Pantri Bach, Drefach, Felindre, Llandysul, SA44 5UG													0.2	0.1	0.3	0.3
Outside Survey Area																
Aldi, Aberystwyth Road, New Town, Cardigan, SA43 1NA	0.3		0.3							2.7	0.0	2.7	4.2	0.1	4.3	7.3
Aldi, Llandeilo Road, Cross Hands, Llanelli, SA14 6RD				0.3	0.0	0.3				0.2		0.2				0.5
Aldi, Stephens Way, Carmarthen, SA31 2BG	2.2	0.2	2.3	0.7	0.0	0.7							4.1	0.0	4.1	7.2
B&M, Hall Street, Carmarthen, SA31 1PH				0.1		0.1										0.1
B&M, Parc y Llyn Retail Park, Llanbadarn Fawr, Dyfed, SY23 3TL								0.0	0.0							0.01
Bailey L J & Sons, Church Street, Llangadog, SA19 9AA					0.0	0.0										0.02
CK Foodstores, Kings Road, Llandovery, SA20 0AN					0.1	0.1										0.06
CK Supermarket, Gogerddan Garage, Tan-y-groes, Cardigan, SA43 2HP														0.1	0.1	0.1
CK's Foodstores, Waun Fawr, Aberystwyth, SY23 3QH											0.1	0.1				0.1
CK's Supermarket, Rhosmaen Street, Llandeilo, SA19 6HD				0.3	0.1	0.4										0.4
CK's Supermarket, Station Road, Newcastle Emlyn, SA38 9BX													0.1	0.1	0.2	0.2
Co-op, High Street, Llandovery, SA20 0RA				0.9	0.2	1.1										1.1
Co-op, New Road, Newcastle Emlyn, SA38 9BA													0.4	0.1	0.6	0.6
Co-op, Rhosmaen Street, Llandeilo, SA19 6LU				0.4	1.0	1.3								0.1	0.1	1.5
Co-op, Station Road, St Clears, Carmarthen, SA33 4DG														0.1	0.1	0.1
Crwst, Bridge Street, Newcastle Emlyn, SA38 9DU														0.0	0.0	0.0
Farmfoods, Heol Stanllyd, Cross Hands Retail Park, Cross Hands, SA14 6RB				0.0		0.0										0.0
Farmfoods, Stephens Way, Pensarn, Carmarthen, SA31 2NG				0.3		0.3							0.2		0.2	0.5
Hugh Evans & Son, Rhosmaen Street, Llandeilo, SA19 6HA					0.0	0.0										0.0
Iceland (The Food Warehouse), Stephens Way, Carmarthen, SA31 2BG	0.2		0.2	0.1		0.1							0.7	0.1	0.8	1.0
Iceland, Rhydal Retail Park, Station Road, Aberystwyth, SY23 1LL							0.1		0.1	0.3	0.1	0.4		0.1	0.1	0.6
Lidl, Cross Hands, Llanelli, SA14 6SY				0.2	0.1	0.3										0.3
Lidl, Foundry Road, Ammanford, SA18 2LS				0.4	0.0	0.4										0.4
Lidl, Friars Park, Carmarthen, SA31 3FF		0.2	0.2	0.6		0.6				0.1		0.1	0.9		0.9	1.9
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL	0.5	0.2	0.7				1.0		1.0	3.6	0.0	3.6				5.3
Local shops, Llandovery Town Centre											0.0	0.0				0.04
Local shops, Llangadog Village Centre					0.0	0.0										0.05
London House Stores, Aberporth, Cardigan, SA43 2EU										0.2	0.0	0.2				0.2
Maeth Y Meysydd, Chalybeate Street, Aberystwyth, SY23 1HX							0.1	0.0	0.1							0.1
Marks and Spencer (M&S), Kingsland High Street, Carmarthen, SA31 1RS		0.1	0.1	0.1	0.0	0.2					0.0	0.0	0.3	0.3	0.6	0.9
Marks and Spencer (M&S), Park Avenue, Aberystwyth, SY23 1PB				0.3	0.1	0.4		0.0	0.0	1.1	0.0	1.2	0.4		0.4	2.0
Morrisons Daily, Carmarthen Road, Fforest-fach, Swansea, SA5 8HR											0.0	0.0				0.04
Morrisons Daily, Manchester House, Carmarthen, SA38 9AJ	0.4		0.4											0.1	0.1	0.5
Morrisons, Parc Pensarn, Carmarthen, SA31 2NF		0.0	0.0	0.3	0.0	0.3							0.9	0.0	0.9	1.3
Morrisons, Parcydolau, Aberystwyth, SY23 3TL	1.2	0.1	1.3				3.9	0.1	4.0	3.9	0.1	4.0	0.1		0.1	9.4
Morrisons, Park Road, Abergavenny, NP7 5TP				0.0		0.0										0.0
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen, SA31 3AX	1.6	0.0	1.6	1.2	0.0	1.2	0.1	0.0	0.1	0.6		0.6	6.8	0.4	7.2	10.7
Tesco Extra, Pontardulais Road, Cadle, Fforest-fach, Swansea, SA5 4BA				0.0		0.0										0.0
Tesco Superstore, Aberystwyth Road, New Town, Cardigan, SA43 1NA	0.4		0.4							2.1		2.1	4.8	0.2	5.0	7.5
Tesco Superstore, Park Avenue, Aberystwyth, SY23 1PB	0.1		0.1				2.3	0.1	2.4	3.8	0.3	4.1	0.3		0.3	6.9
Tesco Superstore, Park Street, Ammanford, SA18 2LR				0.5		0.5										0.5
The Village Shop, Towy Terrace, Ffairfach, Llandeilo, SA19 6ST								0.1	0.1					0.1	0.1	0.2
	26.4	9.4	35.9	12.9	3.2	16.1	11.5	2.2	13.7	22.9	4.0	26.9	28.8	7.2	36.0	128.6

Notes
Turnover derived from h/h survey and total available main and top up expenditure

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 8: Comparison Turnover of Existing facilities, 2025 (£m)

	Zone 1									Zone 2									Zone 3									Zone 4									Zone 5									
Destination	C&F	F&FC	DIY	Elec	Sm H/H	Books	Chem	Recre	Sub Total	C&F	F&FC	DIY	Elec	Sm H/H	Books	Chem	Recre	Sub Total	C&F	F&FC	DIY	Elec	Sm H/H	Books	Chem	Recre	Sub Total	C&F	F&FC	DIY	Elec	Sm H/H	Books	Chem	Recre	Sub Total	C&F	F&FC	DIY	Elec	Sm H/H	Books	Chem	Recre	Sub Total	Total £m
Zone 1																																														
AAA Decorating Centre, Bridge Street, Lampeter, SA48 7HG												0.1						0.1																												0.1
Allied Pharmacy, Taliesin Court, Bridge Street, Lampeter, SA48 7AA							0.0		0.0																																					0.05
BikeWise & Run, Church Street, Lampeter, SA48 7EG								0.4	0.4																																					0.4
Boots Pharmacy, Harford Square, Lampeter, SA48 7DX							0.1		0.1																																					0.1
Co-op, Bridge Street, Lampeter, SA48 7AF				0.1			0.0		0.1							0.1		0.1																												0.2
D.L.Williams Home Centre, High Street, Lampeter, SA48 7BB														0.1				0.1																												0.1
Lampeter Town Centre	2.3	0.8	1.5	1.7	2.1	1.2	1.6	1.0	12.3	0.3	0.1	0.0	0.1	0.3	0.1	0.2		1.1	0.1	0.1	0.1	0.4	0.1	0.1	0.2	0.1	1.2	0.2	0.0	0.1	0.2	0.2	0.3	0.1		1.1	0.1	0.1	0.1	0.3	0.2	0.2	0.1		1.1	16.8
Llanybydder Town Centre						0.1	0.1		0.3							0.0		0.0																												0.3
Robert J H & Sons, High Street, Lampeter, SA48 7BA				0.1					0.1																						0.2					0.2				0.1					0.1	0.3
Roberts Garden Centre, Barley Mow, Lampeter			0.2						0.2			0.1						0.1			0.1						0.1																			0.4
Sainsbury's, Market Street, Lampeter, SA48 7DS					0.3	0.3	0.9		1.5					0.1		0.4		0.5							0.1		0.1							0.1		0.1							0.1		0.1	2.3
Travis Perkins, Llambed Business Park, Tregaron Road, Lampeter			0.4						0.4												0.0						0.0																			0.4
Watson & Pratt's, Lampeter Industrial Estate, Tregaron Road, Lampeter, SA48 8LT																																														
Well Pharmacy, Market Place, Llanybydder, SA40 9UE																0.0		0.0																												0.01
Zone 2																																														
D.L.Williams Building Supplies, Pantyresgair Yard, Talley, Llandeilo, SA19 7YG												0.0						0.0																												0.04
Llanwrda Village Centre																																														
Manordeilo Village Centre																																														
Pumpsaint Village Centre												0.0						0.0																												0.02
Talley Village Centre												0.1						0.1																												0.1
Zone 3																																														
CCF, Station Road, Tregaron, SY25 6HX																																														
Huw Evans Pharmacy, Chapel Street, Tregaron, SY25 6HA																									0.0		0.0																			0.04
Purple Trees / Coed Porffor, Bryn Teifi, Ystrad Meurig, SY25 6AA																					0.0						0.0																			0.03
Tregaron Town Centre																					0.2	0.0			0.5		0.7																			0.7
Zone 4																																														
Aberaeron Town Centre							0.1		0.1										0.1						0.1		0.2	0.2	0.2	0.0	0.1	0.1	0.3	1.0	0.5	2.4		0.0				0.2	0.1		0.3	3.0
CEI Carpets, Upland Square, Gwalia, New Quay, SA45 9QH																																						0.0							0.0	0.03
Costcutter, Uplands Square, New Quay, SA45 9QH																																														
Ffos-y-ffin Village Centre																																														
Llanarth Garden Centre, Llanarth																														0.3						0.3										0.3
Llanarth Village Centre																														0.1						0.1										0.1
Llanon Village Centre																																														
Llanrhystud Village Centre																																														
New Quay Town Centre																													0.1	0.1	0.1			0.1		0.4		0.2					0.2	0.6	0.9	1.3
Norris Carpets, North Road, Aberaeron, SA46 0JF																													0.1							0.1										0.1
Pennant Village Centre																												0.1								0.1										0.1
Quay Bay Trading, Glanmor Terrace, New Quay, SA45 9PS																																							0.1						0.1	0.1
Talybont Village Centre																								0.0			0.0																			0.04
Zone 5																																														
CK's Supermarket, Pencader Road, Pontwelly, Llandysul																																							0.0				0.2		0.2	0.2
Cross Inn Village Centre																																										0.1			0.1	0.1
Davies & Davies Furniture Centre, Felindre, Llandysul, SA44 5UH											0.0	0.0						0.0																												0.03
Dre-fach Felindre Village Centre		0.0							0.0		0.0							0.0		0.0							0.0		0.0							0.0		0.1							0.1	0.2
Farmyard Nurseries, Dol Llan Road, Llandysul																					0.0						0.0												0.2						0.2	0.2
Ffostrasol Village Centre																													0.0							0.0										0.02
Llandysul Town Centre																													0.1		0.0					0.1		0.3		0.1		0.1	0.7		1.1	1.2
Nisa Extra, Pencader Road, Pontwelly, Llandysul																																											0.0		0.0	0.0
Sarnau Village Centre																	0.3	0.3																												0.3
Spar, Lincoln Street, Llandysul, SA44 4BU																																														
Outside Survey Area																																														
Aber Gas & Electrical Appliances, Cambrian Street, Aberystwyth, SY23 1NZ																						0.1					0.1				0.0					0.0										0.1
Abergavenny Town Centre					0.1				0.1		0.0							0.0																												0.2
Aberporth Village Centre																				0.0							0.0																0.1		0.1	0.1
Aberystwyth Town Centre	1.2	0.2	0.2	0.3	0.4	0.2	0.1		2.6		0.0	0.1						0.1	1.3	0.1	0.1	0.1	0.5	0.8	0.3	1.1	4.5	2.3	0.2	0.3	0.5	1.1	1.6	0.5	1.7	8.3	0.7	0.0	0.0	0.1		0.1			0.8	16.3
Aldi, Aberystwyth Road, New Town, Cardigan																														0.1				0.0		0.1							0.1		0.1	0.2
Aldi, Stephens Way, Carmarthen							0.1		0.1							0.0		0.0																			0.1		0.0		0.1			0.2	0.4	0.5
Ammanford Town Centre											0.0			0.0				0.1																												0.1
Argos, Merlin Street, Carmarthen, SA31 3BN																																								0.2					0.2	0.2
Argos, Rheidol Retail Park, Aberystwyth, SY23 1LL																															0.1				0.3	0.4										0.4
Asda Living, Trostre Retail Park, Llanelli, SA14 9UY													0.1					0.1																												0.1
B&M, Aberystwyth Road, North Park Estate, Ceredigion, SA43 1NA																														0.1		0.1				0.1			0.1	0.1					0.1	0.3
B&M, Cross Hands Business Centre Heol Parc Mawr, Cross Hands, SA14 6SY														0.1			0.3	0.4																												0.4
B&M, Hall Street, Carmarthen			0.1						0.1																														0.0						0.0	0.1
B&M, Parc y Llyn Retail Park, Llanbadarn Fawr, Dyfed			0.1		0.2			0.4	0.6																					0.1		0.1		0.0		0.2										0.8
B&Q, Old Towy Sawmills, Glanyrafon Road, Carmarthen			0.3						0.3			0.3						0.3		0.0	0.1						0.1			0.0						0.0		0.0	0.9						0.9	1.7
Blaenporth Village Centre																																						0.0							0.0	0.03
Brecon Town Centre					0.1				0.1																												0.2				0.2				0.4	0.6
Bristol City Centre																																						0.0							0.0	0.03
British Heart Foundation Home Store, Pensarn Retail Park, Stephens Way, Carmarthen, SA31 2BG											0.0		0.1					0.1																												0.1
Bronant Local Centre																				0.0							0.0																			0.05
Burton upon Trent Town Centre																	0.1	0.1																												0.1
Cardiff Bay Retail Park, Ferry Road, Cardiff, CF11 0JR																												0.2								0.2										0.2
Cardiff City Centre	0.3								0.3		0.0			0.1				0.1	0.1				0.1		0.0		0.3	0.1				0.2				0.2	0.6								0.6	1.7
Cardigan Town Centre			0.1		0.1		0.1		0.3					0.1				0.1										0.1	0.0	0.1		0.2		0.0	0.3	0.8	0.6	0.1	0.2	0.2		0.5	0.3	0.6	2.4	3.6
Carmarthen Town Centre	1.6	0.1		0.2	0.8	1.0	0.1	1.0	4.8	1.5	0.0	0.2	0.2	0.3	0.6	0.2	0.7	3.7	0.3				0.1			0.2	0.6	0.2	0.0			0.1		0.1	0.3	0.7	3.4	0.1	0.1	0.2	1.3	0.5	0.5	1.2	7.2	17.1
Carmarthen Garden Centre, Myrtle Hill, Pensarn, Carmarthen												0.0						0.0																					0.1						0.1	0.2
CCF, Parc Teifi Business Park, Cardigan, SA43 1EW																																														
Central London																												0.2								0.2										0.2
Chadzy's, Bryneithyn, Newcastle Emlyn, SA38 9DQ																																							0.0						0.0	0.04
Charlies Stores, Cambrian Place, Aberystwyth, SY23 1NT																														0.1						0.1										0.1
Charlies Stores, Stephens Way, Carmarthen, SA31 2BG			0.0						0.0			0.0						0.0			0.0						0.0												0.0						0.0	0.1
CK's Supermarket, Penparcau Road, Penparcau, Aberystwyth																																														
CK's Supermarket, Rhosmaen Street, Llandeilo																																														
CK's Supermarket, Station Road, Newcastle Emlyn																																														
Co-op, High Street, Llandovery, SA20 0RA																0.0		0.0																												0.05
Co-op, Rhosmaen Street, Llandeilo, SA19 6LU																0.0		0.0																												0.01
Costco, Capital Retail Park, Leckwith Road, Cardiff, CF11 8EG													0.0					0.0																												0.02
Crickhowell Town Centre											0.0			0.1				0.1					0.1				0.1																			0.2
Cross Hands Industrial Estate, Heol Stanllyd, Cross Hands, Llanelli, SA14 6RB		0.1							0.1	0.1	0.0							0.1																												0.1
Cross Retail Park, Culverhouse Cross, Cardiff, CF5 6EH																												0.1								0.1										0.1
Crymych Village Centre																																								0.1					0.1	0.1
Cwmdu Industrial Estate, Carmarthen Road, Gendros, Swansea																																														
Days Department Store, Hall Street, Carmarthen, SA31 1PH																																									0.1				0.1	0.1
Designer Outlet Cheshire Oaks, Kinsey Road, Wirral, CH65 9JJ																			0.1								0.1	0.2								0.2										0.3
Designer Outlet, Derwen, Bridgend, CF32 9SU										0.1								0.1																			0.4				0.2	0.1			0.7	0.8
DFS, Bush Road, Morriston, Swansea, SA6 8ER		0.1							0.1																																					0.1
DFS, Springfield Retail Park, Fishguard Road, Haverfordwest, SA61 2AT																													0.0			0.1				0.1										0.1
Dobbies Garden Centre, Siemens Way, Bon-y-maen, Swansea																																														
Driffield Town Centre																																										0.1			0.1	0.1
Dunelm, Myrtle Hill, Pensarn, Carmarthen, SA31 2NG											0.0			0.1				0.1		0.0	0.0		0.3				0.4					0.1				0.1					0.1				0.1	0.6
Dunelm, Sundorne Retail Park, Whitchurch Road, Shrewsbury, SY1 4YA																							0.1				0.1																			0.1
Eve's Toy Shop, King Street, Llandeilo, SA19 6AA																	0.1	0.1																												0.1
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest-fach, Swansea																																						0.1							0.1	0.1
Ford Retail Park, Towy, Carmarthen (Currys, The Range & more)			0.1	0.5	0.1				0.6			0.0	0.4	0.1				0.5				0.0					0.0		0.0			0.1			0.1	0.2			0.2	1.1	0.9	0.2		0.2	2.5	3.9
Glan Yr Afon Industrial Estate, Llanbadarn Fawr, Aberystwyth (Toolstation, Screwfix, Jewson & more)																					0.1						0.1		0.0	0.1						0.2										0.3
Gorseinon Town Centre															0.1		0.3	0.4																												0.4
Hafren Furnishers, Llanbadarn Fawr, Aberystwyth, SY23 3TN																				0.1							0.1		0.0							0.0										0.1
Hafren Furnishers, Llangurig Road, Llanidloes, SY18 6ES											0.0							0.0											0.0							0.0										0.03
Hafren Furnishers, Westgate Street, Llanidloes, SY18 6HL																				0.0							0.0																			0.04
Happy Home Furnishers, Heol Parc Mawr, Cross Hands, Llanelli, SA14 6RE											0.0							0.0																												0.02
Haverfordwest Town Centre																													0.1							0.1										0.1
Henllan Village Centre																																							0.1						0.1	0.1
Hereford City Centre														0.1				0.1																												0.1
Home Bargains, Cross Hands Business Park, Heol Stanllyd, Cross Hands, Llanelli, SA14 6RB												0.1				0.0		0.1																												0.1
Home Bargains, Park Avenue, Ystwyth Retail Park, Aberystwyth			0.2						0.2			0.1						0.1			0.0						0.0		0.0	0.3				0.0	0.1	0.4										0.7
Home Bargains, Stephens Way, Carmarthen	0.2		0.1				0.1		0.4			0.1				0.1		0.2																					0.4				0.0		0.4	1.0
Hugh Evans & Son, Rhosmaen Street, Llandeilo, SA19 6HA																																														
Ikea, Ferry Road, Cardiff, CF11 0XR		0.1			0.2				0.3		0.0			0.1				0.2											0.1			0.2				0.4		0.1							0.1	0.8
J Harries Electrical, Parc Teifi, Cardigan, SA43 1EW																																								0.1					0.1	0.1
John Lewis, The Hayes, Cardiff, CF10 1EG		0.1							0.1	0.1				0.1				0.2																												0.3
Jones Television & Electrical Services, Llannon Road, Nantgaredig, Llanegwad, Carmarthen, SA32 7NH													0.1					0.1																												0.1
Leekes, Cowbridge Road, Talbot Green, Pontyclun, CF72 8XU											0.0							0.0																				0.0							0.0	0.1
Leekes, Cross Hands Business Park, Llanelli, SA14 6RB											0.1	0.0						0.1		0.0							0.0		0.1							0.1		0.1			0.1				0.2	0.5
Lidl, Foundry Road, Ammanford, SA18 2LS																0.0		0.0																												0.03
Lidl, Friars Park, Carmarthen							0.1		0.1																												0.1								0.1	0.2
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth																										0.1	0.1				0.1			0.1		0.2										0.2
Llanbadarn Fawr Village Centre		0.0							0.0																																					0.04
Llandeilo Town Centre	0.2				0.3				0.5	0.1	0.1	0.1	0.2	0.3	0.2	0.2	0.2	1.4														0.2				0.2		0.0							0.0	2.2
Llandovery Town Centre					0.5			0.6	1.1	0.2		0.1	0.0	0.1	0.0	0.0		0.5														0.1				0.1										1.7
Llandudno Town Centre						0.1			0.1																																					0.1
Llanelli Town Centre											0.0							0.0																												0.03
Llangadog Village Centre												0.0						0.0																												0.02
Llanilar Village Centre																									0.0		0.0																			0.01
Llanwrtyd Wells Town Centre																																														
Londis, Cross Hands Road, Gorslas, Llanelli, SA14 6RR																																														
Maes Yr Eithin Retail Park, Llandeilo Road, Cross Hands, Llanelli (Lidl, Pets at Home, B&M, Shoezone & more)														0.1				0.1																												0.1
Marks and Spencer (M&S), Copthorne Way, Culverhouse Cross, Cardiff, CF5 6YZ											0.0							0.0																												0.02
Marks and Spencer (M&S), Kingsland High Street, Carmarthen	0.6								0.6	0.1				0.2				0.2										0.2				0.2				0.4	0.1				1.1		0.1		1.3	2.5
Marks and Spencer (M&S), Park Avenue, Aberystwyth	0.7				0.5				1.2	0.3				0.2		0.0		0.5	0.2				0.4				0.6	1.2				0.5		0.1		1.8	0.2				0.2				0.4	4.6
Matalan, Pensarn Retail Park, Stephens Way, Carmarthen, SA31 2BG																																					0.1								0.1	0.1
Mega Motorcycle Store, Athena Avenue, Swindon, SN2 8EJ																																												0.2	0.2	0.2
Meol Brace Retail Park, Hereford Road, Shrewsbury, SY3 9NB																																														
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea (B&Q, Currys, TK Maxx, Boots, Morrisons & more)	0.2	0.1		0.1				0.4	0.9		0.0							0.0		0.0							0.0											0.2		0.2					0.4	1.3
Morrisons, Parc Pensarn, Carmarthen							0.0		0.0							0.0		0.0																									0.1		0.1	0.2
Morrisons, Parcydolau, Aberystwyth							0.1		0.1													0.0	0.0		0.1		0.1	0.2		0.1				0.2		0.4										0.6
Mountain Warehouse, Pontardulais Road, Cadle, Fforest-fach, Swansea, SA5 4BA										0.2								0.2																												0.2
Nantgaredig Village Centre													0.1					0.1																												0.1
Narberth Town Centre																																					0.1				0.1				0.2	0.2
Newcastle Emlyn Town Centre		0.1							0.1	0.1								0.1																					0.1	0.8	0.3	0.2	0.4	0.2	2.1	2.2
Newmans Garden Centre, Capel Dewi, Aberystwyth																														0.1						0.1										0.1
Nigel Williams Pharmacy, Rhosmaen Street, Llandeilo, SA19 6EN																0.0		0.0																												0.03
Nisa Extra, Dyfed Llandysul, Station Road, Newcastle Emlyn																																														
Onllwyn Village Centre						0.1		0.2	0.3																																					0.3
Parc Pemberton Retail Park, Llanelli (Dunelm, Halfords, The Range, Currys, Halfords, Screwfix, Morrisons & more)		0.1		0.2					0.3																												0.4								0.4	0.6
Parc Tawe Retail Park, Quay Parade, Swansea (Aldi, Sports Direct, Iceland, B&M, JD Sports, Farmfoods & more)																																														
Parc Trostre Retail Park, Trostre Road, Llanelli (Tesco, M&S, B&Q, Primark, JD Sports, B&M & more)	0.2			0.2				0.8	1.3	0.1								0.1	0.0								0.0												0.1						0.1	1.5
Parc y Llyn Retail Park, Llanbadarn Fawr, Aberystwyth (Morrisons, Halfords, Currys, B&M & more)				0.1				0.2	0.3				0.0					0.0	0.3		0.5	0.7	0.2			0.1	1.9	0.2		0.4	1.2	0.3			0.3	2.4				0.2	0.1		0.0		0.3	4.9
Pembroke Dock Town Centre																																										0.1			0.1	0.1
Pencader Village Centre																																														
Pensarn Retail Park, Stephens Way, Carmarthen (Aldi, Game, Pets at Home, Dreams, Iceland, Toolstation & more)	0.1		0.1		0.2				0.4	0.2	0.0	0.0	0.0	0.1			0.2	0.5					0.0				0.0		0.1							0.1	0.4	0.1	0.1					1.2	1.8	2.8
Phoenix Retail Park, Llansamlet, Swansea (Iceland, Home Bargains, B&M & more)											0.0							0.0																												0.03
Pontarddulais Garden Centre, Allt-Y-Graban Road, Pontarddulais, Swansea																																														
Pontarddulais Town Centre																																														
Pugh's Garden Village, Tynant Nursery, Morganstown, Radyr, Cardiff, CF15 8LB																																							0.1						0.1	0.1
Rhayader Town Centre																																														
Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL																										0.1	0.1																			0.1
Right Price Carpets, Pier Street, Aberystwyth, SY23 2LN											0.0							0.0																												0.01
RM Hardware & Agricultural Supplies, King Street, Carmarthen, SA31 1BS												0.0		0.1				0.1																												0.1
Sainsbury's, St Ann Way, Gloucester, GL2 5SA																																									0.1				0.1	0.1
Screwfix, Alltycnap Road, Carmarthen												0.0						0.0																												0.03
Screwfix, Cross Hands Industrial Estate, Heol Stanllyd, Cross Hands, Llanelli												0.0	0.0					0.0																												0.04
Screwfix, Parc Teifi Business Park, Cardigan				0.1					0.1																					0.0						0.0			0.0						0.0	0.2
Shrewsbury Town Centre																			0.0								0.0																			0.05
Smyths Toys, Capital Shopping Park, Hadfield Road, Cardiff, CF11 8EG																																			0.1	0.1										0.1
Smyths Toys, Swansea Enterprise Park, St. Davids Road, Llansamlet, Swansea, SA6 8QL																																												0.6	0.6	0.6
Speedy Sofas, Yr Albion, Pencader, SA39 9ES																																						0.0							0.0	0.03
Sports Direct, Pensarn Retail Park, Stephens Way, Pensarn, Carmarthen, SA31 2BG																	0.3	0.3																												0.3
St Catherine's Walk Shopping Centre, St Catherine Street, Carmarthen										0.1						0.0		0.1																			0.3					0.1			0.4	0.5
Sundorne Retail Park, Arlington Way, Shrewsbury, SY1 4YA																				0.0							0.0																			0.02
Swansea City Centre	0.2								0.2	0.1								0.1										0.2								0.2	0.3	0.1			0.2	0.2			0.7	1.1
Swansea Enterprise Park, Llansamlet, Swansea (Wren Kitchens, Tapi Carpets & Floors, Halfords & more)										0.2	0.1							0.2											0.0							0.0		0.1							0.1	0.3
Swiss Valley Garden Centre, Llannon Road, Felinfoel, Llanelli																																														
T L Thomas & Son, Cross Roads, Llanllwni, Pencader, SA39 9DY																																							0.0						0.0	0.04
Talbot Green Town Centre																0.0		0.0																												0.01
Taunton Town Centre																								0.0			0.0																			0.04
Telegraph Garden and Indoor Plant Centre, Telegraph Inn, Llangadog, SA19 9LS												0.0						0.0																												0.03
Tenby Town Centre																																0.1				0.1										0.1
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen							0.1		0.1	0.1			0.1	0.3	0.1	0.0		0.7																			0.1			0.2	0.9	0.4	0.7	0.6	2.8	3.6
Tesco Superstore, Aberystwyth Road, New Town, Cardigan					0.2		0.0		0.2				0.1					0.1										0.1				0.3	0.1	0.2		0.7					0.2		0.2		0.4	1.4
Tesco Superstore, Park Avenue, Aberystwyth	0.1								0.1														0.0	0.1	0.1	0.2	0.5					0.2		0.1		0.4	0.1								0.1	1.0
Tesco Superstore, Park Street, Ammanford, SA18 2LR																0.0		0.0																												0.0
The Entertainer, St Catherine Street, Carmarthen, SA31 1GA																	0.1	0.1																												0.1
Toolstation, Dafen Trade Park, Dafen Road, Dafen, Llanelli																																														
Travis Perkins, Glan Yr Afon Industrial Estate, Cae Gwyn, Aberystwyth, SY23 3JF																														0.1						0.1										0.1
Trefhedyn, Bridge Street, Newcastle Emlyn, SA38 9DU			0.0						0.0												0.0						0.0												0.3						0.3	0.4
Tresaith Village Centre																																														
Velindre Local Centre																																						0.0							0.0	0.03
Webbs of Crickhowell, High Street, Crickhowell, NP8 1BD											0.0							0.0		0.0							0.0																			0.05
Well Pharmacy, Rhosmaen Street, Llandeilo, SA19 6HA																0.0		0.0																												0.02
West Swansea Retail Park, Pontardulais Road, Cadle, Fforest-fach, Swansea		0.1							0.1		0.0							0.0																				0.1							0.1	0.2
WHSmith, Trostre Retail Park, Parc Trostre, Llanelli, SA14 9UY								0.4	0.4																																					0.4
Wynnstay Stores, Heol Parc Mawr, Cross Hands, Llanelli, SA14 6RE												0.0						0.0																												0.04
Ystrad Nursery, Agricultural Supplies and Café, Llandovery												0.1						0.1			0.0						0.0																			0.1
Ystwyth Retail Park, Park Avenue, Aberystwyth																			0.4		0.0		0.3				0.7	0.5		0.2	0.2	0.3				1.1					0.2				0.2	2.0
	8.2	1.8	3.4	3.7	6.2	3.0	3.7	5.3	35.3	3.6	0.8	1.7	1.6	3.0	1.2	1.7	2.5	16.0	3.1	0.6	1.4	1.4	2.4	1.1	1.4	1.9	13.3	6.3	1.3	2.6	2.8	4.7	2.3	2.7	3.9	26.6	8.2	1.8	3.5	3.6	6.4	2.8	3.8	5.5	35.5	126.8

Notes
Turnover derived from h/h survey and available comparison expenditure

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 9: Retail Turnover of Proposed Development

	Net sales area (sqm)	Trading density (£/sqm)	Turnover 2025 (£m)	Turnover 2030 (£m)	Turnover 2030 inc. inflow (£m)
	[1]	[2]	[3]	[4]	[5]
Proposed Lidl Foodstore	1,178				
convenience	942	8,585	8.1	8.1	8.9
comparison	236	4,620	1.1	1.2	1.4
Total				9.3	10.3

Notes

[1] Net sales area taken from application drawings

[2] s/d taken from Global Data (March 2025) indexed to 2023 price base

[3] = [1]*[2]/1,000,000

[4] turnover rolled forward to 2030 based on assumed f/s efficiency increase (0% conv, 2.6% comp) (EXRPBN 22 Fig 4a (Mar 2025))

[5] 10% inflow

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 10a Capacity for additional convenience floorspace to 2030

	2025	2030
[1] Available Convenience Expenditure in PCA (Zone 1) (£m)	36	35
[2] PCA derived turnover of stores in PCA (Zone 1) (£m)	27	26
[3] Turnover of proposed development (£m)		8.1
[4] Turnover of Convenience Retail Commitments in PCA (£m)	0.0	0.0
[5] Total PCA turnover (£m)	27	34
[6a] PCA convenience expenditure capacity (£m)	9	1

Notes
[1] taken from table 4
[2] derived from table 7. Projected forward to 2025/30 on basis that facilities gain from a pro-rata growth in expenditure as set out at Table 4
[3] taken from table 9
[5] = [2]+[3]+[4]
[6a] = [1]-[5]
[6b] = [5] as a % of [1]

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 10b Market share assessment - post development

	PCA (Zone 1) (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Total (£m)
[1] Available expenditure (£m)	35.9	16.1	13.7	26.9	36.0	128.6
[2] Expenditure to proposed store (£m)	5.1	1.3	0.6	0.3	0.7	8.1
[3] Existing retained zonal expenditure	26.9	0.4	2.2	4.5	7.0	62.2
[4] Zonal expenditure change (£m)	2.3	0	0	-0.1	-0.1	
[5] Market share %	81.6	2.7	16.2	16.5	19.1	48.4

Notes
[1] taken from table 7a
[2] table 13
[3] table 7a
[4] table 14
[5] = [3]+[4]/100

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 10c: Capacity estimate for additional convenience goods floorspace in Lampeter PCA

PCA	Net Conv Sales area sqm	Sales Density £/sqm	Benchmark Turnover £m	Survey Turnover (exc. inflow) £m	Survey Turnover (inc. inflow) £m	Overtrading +/- (exc. inflow) £m	Overtrading +/_ (inc. inflow) £m
	[1]	[2]	[3]	[4]	[5]	[6]	[7]
Co-op, Bridge Street, Lampeter, SA48 7AF	855	10,859	9.3	9.1	10.2	- 0.2	0.9
Costcutter, Pentre-bach, Lampeter, SA48 7JR (Petrol Filling Station)	75	5,708	0.4	0.03	0.04	- 0.4	- 0.4
Costcutter, Ystrad Garage, Felinfach, Lampeter, SA48 8AE (Petrol Filling Station)	95	5,708	0.5	0.2	0.2	- 0.4	- 0.3
Local shops, Lampeter Town Centre*	176	5,000	0.9	0.8	1.0	- 0.0	0.1
Mark Lane Bakery & Café, Bridge Street, Lampeter, SA48 7HG	78	4,500	0.4	0.1	0.1	- 0.3	- 0.2
Mulberry Bush Wholefoods, Bridge Street, Lampeter, SA48 7HG	86	4,500	0.4	0.1	0.1	- 0.3	- 0.3
Sainsbury's, Market Street, Lampeter, SA48 7DS	1,246	11,613	14.5	30.4	34.9	15.9	20.5
Premier, High Street, Lampeter, SA48 7BG	50	8,349	0.4	0.3	0.3	- 0.2	- 0.1
Watson & Pratt's, Industrial Estate, Tregaron Road, Lampeter, SA48 8LT	90	5,000	0.5	0.3	0.3	- 0.2	- 0.1
Bara Gwalia (Bakery), Llanybydder, SA40 9UE	20	4,500	0.1	0.1	0.1	0.0	0.0
Nisa, Post Office, Rhiw San Pedr, Llanybydder, SA40 9XP	95	7,452	0.7	0.1	0.1	- 0.6	- 0.6
Siop y Bont, Bridge Street, Llanybydder, SA40 9XY	90	5,000	0.5	0.2	0.3	- 0.2	- 0.2
			28.5	**41.8**	**47.7**	**13.3**	**19.3**
Study Area market share %				**32.5**	**37.1**		

Notes
[1] derived from VOA, Experian GOAD, CS estimate
[2] GlobalData 2025 (at 2023 prices) or CS estimate where unpublished
[3] =[1]*[2]/1,000,000
[4] Table 7A RIAA
[5] non-resident spend (inc. tourist) of c.12-15%
[6]=[4]-[3]
[7]=[5]-[3]
* estimate of unnamed misc stores

Table 10d: Capacity estimate for additional convenience goods floorspace in Lampeter PCA, 2030

Capacity in Lampeter PCA	Benchmark Turnover £m	Available Expenditure/Turnover £m	Inflow £m	Surplus expenditure inc. inflow £m)	Surplus expenditure exc. inflow (£m)
	[1]	[2]	[3]	[4]	[5]
2025 PCA avble expenditure (Zone 1)	28.5	35.9	5.0	12.5	7.4
2025 Turnover	28.5	41.8	6.0	19.3	13.3
2030 PCA avble expenditure (Zone 1)	28.5	34.8	4.9	11.2	6.4
2030 Turnover	28.5	40.5	5.7	17.7	12.1

Notes
[1] Table 15A
[2] Table 7A RIAA & Table 15A, 2030 accounting for exp (minus) growth
[3] est 14%
[4] = [2]+[3]-[1]
[5]=[2]-[1]
Assumes constant market share

Table 10e: Convenience sales floorspace capacity in PCA, 2030

	Surplus Expenditure £m	Sales density £/sqm	Floorspace capacity sqm net
	[1]	[2]	[3]
Floorspace Capacity in 2030 (exc. inflow) (PCA Exp)	6.4	7,989	797
Floorspace Capacity in 2030 (inc. inflow) (PCA Exp)	11.2	7,989	1,408
Floorspace Capacity in 2030 (exc. inflow) (Turnover)	12.1	7,989	1,510
Floorspace Capacity in 2030 (inc. inflow) (Turnover)	17.7	7,989	2,220

Notes
[1]=Table 15B
[2]= Lidl sales density - GlobalData 2025 (at 2023 price base)
[3] = [1]/[2]*1,000,000

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 11a Zonal trade draw assessment to proposed store

		Zone					Total
		1	2	3	4	5	
Nexus - trade draw pattern							
£m		*6*	*1.4*	*0.8*	*0.4*	*0.5*	*9.2*
%		*65.4*	*15.6*	*9.2*	*4.7*	*5.0*	*100*
Lidl							
Convenience Goods turnover of proposal							
	£m	5.1	1.3	0.6	0.3	0.7	8.1
Zonal trade draw	%	63.0	16.6	8.0	3.4	9.0	100

Notes
Turnover derived from Table 9
Numbers may not add due to rounding

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 11b: Convenience goods trade diversion to proposed store - zonal assessment

Destination	Zone 1 Sub Total £m	Zone 1 %	Zone 1 £m	Zone 2 Sub Total £m	Zone 2 %	Zone 2 £m	Zone 3 Sub Total £m	Zone 3 %	Zone 3 £m	Zone 4 Sub Total £m	Zone 4 %	Zone 4 £m	Zone 5 Sub Total £m	Zone 5 %	Zone 5 £m	Total (£m)	TD Total £m
Zone 1																	
Bara Gwalia, Llanybydder, SA40 9UE	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Co-op, Bridge Street, Lampeter, SA48 7AF	7.0	11.0	0.6	1.5	13	0.2	0.6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	9.1	0.7
Costcutter, Pentre-bach, Lampeter, SA48 7JR	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Costcutter, Ystrad Garage, Felinfach, Lampeter, SA48 8AE	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0
Local shops, Lampeter Town Centre	0.8	1.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.03	0.0	0.0	0.0	0.0	0.0	0.8	0.1
Mark Lane Bakery & Café, Bridge Street, Lampeter, SA48 7HG	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Mulberry Bush Wholefoods, Bridge Street, Lampeter, SA48 7HG	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Nisa, Post Office, Rhiw San Pedr, Llanybydder, SA40 9XP	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Premier, High Street, Lampeter, SA48 7BG	0.3	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Sainsbury's, Market Street, Lampeter, SA48 7DS	18.2	40.0	2.0	5.2	15.0	0.2	2.9	12.0	0.1	2.0	0.0	0.0	2.0	0.0	0.0	30.4	2.3
Siop y Bont, Bridge Street, Llanybydder, SA40 9XY	0.1	0.4	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Watson & Pratt's, Industrial Estate, Tregaron Road, Lampeter, SA48 8LT	0.3	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Checkpoint Garage, Harford, Llanwrda, SA19 8DT	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Cwmdu Inn, Shop & Post Office, Cwmdu, Llandeilo, SA19 7DY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Llanwrda Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nisa Local, Harford, Llanwrda, SA19 8DT	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Village Shop and Coffee, Talley Road, Llandeilo, SA19 7YP	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Caffe A Siop, Village Square, Llangeitho, Tregaron, SY25 6TL	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Caron Groceries, Station Road, Tregaron, SY25 6HX	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0
Local shops, Pontrhydfendigaid Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.04	0.0
New Medical Hall, Station Road, Tregaron, SY25 6HU	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Riverbank Café and Farm Shop, Tregaron, SY25 6QS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.01	0.0
Siop y Bont, Bridge Street, Pontrhydfendigaid, Ystrad Meurig, SY25 6EE	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Spar, Rhydyronnen, Tregaron, SY25 6JL	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0
Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-op (Mini Market), Haven Quay West Holiday Park, New Quay, SA45 9SE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Costcutter, Alma Street, Ceredigion, Llanarth, SA47 0NP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Costcutter, Llanrhystud Service Station, Llanrhystud, SY23 5BT	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Costcutter, Market Street, Aberaeron, SA46 0AS	0.5	3.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.3	0.0	0.0	2.9	0.2
Costcutter, Uplands Square, New Quay, SA45 9QH	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	20.0	0.1	0.0	0.0	0.0	0.6	0.1
Glenarthen Stores, Cross Inn, Llanon, SY23 5NB	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.3	0.0
Local shops, Aberaeron Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Local shops, Llwyncelyn Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Local shops, New Quay Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.02	0.0
Londis, Llwyncelyn, Aberaeron, SA46 0HF	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Morrisons Daily, Forge Industrial Park, Aberaeron, SA46 0HA	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.1	0.0	0.0	1.5	0.0
Premier, London House, Llanon, SY23 5HG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Premier, Pont Llethi, Llanarth, SA47 0NE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
The Moody Cow Farm Shop & Welsh Bistro, Llwyncelyn, Aberaeron, SA46 0HL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Watson & Pratt's, Bridge Street, Aberaeron, SA46 0AP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.04	0.0
Ydfa Health Food Store, Victoria Street, Aberaeron, SA46 0AS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.04	0.0
Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CK's Supermarket, Pencader Road, Pontwelly, Llandysul, SA44 4AE	0.2	1.0	0.1	0.1	10.0	0.1	0.0	0.0	0.0	0.00	0.0	0.0	3.0	0.0	0.0	3.3	0.2
Local shops, Brynhoffnant Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londis, Drefach, Felindre, Llandysul, SA44 5UG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Londis, North Cardigan, Brynhoffnant, Llandysul, SA44 6ED	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.5	0.0
Londis, Pencnwc Isaf, Cross Inn, Llandysul, SA44 6NL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.02	0.0
Morrisons Daily, Gwalia House, Felindre, Carmarthen, SA44 5UG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0
Nisa Extra, Pencader Road, Pontwelly, Llandysul, SA44 4AE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0
Premier (JJ Stores), Storfa, Ffostrasol, Llandysul, SA44 4SY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Siop y Pentref, Cross Inn, New Quay, SA44 6NL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, Lincoln Street, Llandysul, SA44 4BU	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	7.0	0.1	2.6	0.1
Y Pantri Bach, Drefach, Felindre, Llandysul, SA44 5UG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.3	0.0
Outside Survey Area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Aldi, Aberystwyth Road, New Town, Cardigan, SA43 1NA	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	4.3	0.0	0.0	7.3	0.0
Aldi, Llandeilo Road, Cross Hands, Llanelli, SA14 6RD	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.5	0.0
Aldi, Stephens Way, Carmarthen, SA31 2BG	2.3	18.0	0.9	0.7	22.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	4.1	8.0	0.1	7.2	1.3
B&M, Hall Street, Carmarthen, SA31 1PH	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
B&M, Parc y Llyn Retail Park, Llanbadarn Fawr, Dyfed, SY23 3TL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.01	0.0
Bailey L J & Sons, Church Street, Llangadog, SA19 9AA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.02	0.0
Cilgerran Siop y Pentre, Dolwar Fach, High Street, Cilgerran, Cardigan, SA43 2SG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CK Foodstores, Black Lion, St Clears, Carmarthen, SA33 4AA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CK Foodstores, Kings Road, Llandovery, SA20 0AN	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.06	0.0
CK Supermarket, Gogerddan Garage, Tan-y-groes, Cardigan, SA43 2HP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0
CK's Foodstores, Penbryn, Cardigan, SA43 2HP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CK's Foodstores, Waun Fawr, Aberystwyth, SY23 3QH	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
CK's Supermarket, Penparcau Road, Penparcau, Aberystwyth, SY23 1RR	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CK's Supermarket, Rhosmaen Street, Llandeilo, SA19 6HD	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
CK's Supermarket, Station Road, Newcastle Emlyn, SA38 9BX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2	0.0
Co-op, High Street, Llandovery, SA20 0RA	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Co-op, Job's Well Road, Carmarthen, SA31 3HG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, King Street, Carmarthen, SA31 1BH	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, New Road, Newcastle Emlyn, SA38 9BA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6	0.0
Co-op, Rhosmaen Street, Llandeilo, SA19 6LU	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.5	0.0
Co-op, Station Road, St Clears, Carmarthen, SA33 4DG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0
Costcutter, Mill Street, Aberystwyth, SY23 1HZ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Crwst, Bridge Street, Newcastle Emlyn, SA38 9DU	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Farmfoods, Heol Stanllyd, Cross Hands Retail Park, Cross Hands, SA14 6RB	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Farmfoods, Stephens Way, Pensarn, Carmarthen, SA31 2NG	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.5	0.0
Home Bargains, Cross Hands Business Park, Heol Stanllyd, Cross Hands, Llanelli, SA14 6RB	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Home Bargains, Park Avenue, Ystwyth Retail Park, Aberystwyth, SY23 1PB	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Home Bargains, Stephens Way, Carmarthen, SA31 2BG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Hugh Evans & Son, Rhosmaen Street, Llandeilo, SA19 6HA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Iceland (The Food Warehouse), Stephens Way, Carmarthen, SA31 2BG	0.2	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	1.0	0.0
Iceland, Rhydal Retail Park, Station Road, Aberystwyth, SY23 1LL	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.1	0.0	0.0	0.6	0.0
Lidl, Cross Hands, Llanelli, SA14 6SY	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Lidl, Foundry Road, Ammanford, SA18 2LS	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Lidl, Friars Park, Carmarthen, SA31 3FF	0.2	1.0	0.1	0.6	10.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.9	80.0	0.6	1.9	0.8
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL	0.7	10.0	0.5	0.0	0.0	0.0	1.0	76.0	0.5	3.6	25.0	0.1	0.0	0.0	0.0	5.3	1.1
Local shops, Llandovery Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.04	0.0
Local shops, Llangadog Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.05	0.0
London House Stores, Aberporth, Cardigan, SA43 2EU	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Maeth Y Meysydd, Chalybeate Street, Aberystwyth, SY23 1HX	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Marks and Spencer (M&S), Kingsland High Street, Carmarthen, SA31 1RS	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.9	0.0
Marks and Spencer (M&S), Park Avenue, Aberystwyth, SY23 1PB	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.4	0.0	0.0	2.0	0.0
Morrisons Daily, Carmarthen Road, Fforest-fach, Swansea, SA5 8HR	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.04	0.0
Morrisons Daily, Manchester House, Carmarthen, SA38 9AJ	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.5	0.0
Morrisons, Parc Pensarn, Carmarthen, SA31 2NF	0.03	0.0	0.0	0.3	18.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	5.0	0.04	1.3	0.3
Morrisons, Parcydolau, Aberystwyth, SY23 3TL	1.3	6.0	0.3	0.0	0.0	0.0	4.0	12.0	0.1	4.0	0.0	0.0	0.1	0.0	0.0	9.4	0.4
Morrisons, Park Road, Abergavenny, NP7 5TP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nisa Extra, Dyfed Llandysul, Station Road, Newcastle Emlyn, SA38 9BX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nisa, Siop Y Ffrydiau, Cenarth, Newcastle Emlyn, SA38 9JP	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Carmarthen Road, Pencader, SA39 9HA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Great Darkgate Street, Aberystwyth, SY23 1DW	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, High Street, St Dogmaels, Cardigan, SA43 3EF	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, King Street, Carmarthen, SA31 1BS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, North Parade, Aberystwyth, SY23 2JN	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Penparcau Road, Penparcau, Aberystwyth, SY23 1RR	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Priory Street, Cardigan, SA43 1BZ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Sycamore Street, Newcastle Emlyn, SA38 9AJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Premier, Sycamore Way, Carmarthen, SA31 3QG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, Llansteffan Road, Johnstown, Carmarthen, SA31 3NG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, North Road, Cardigan, SA43 1LS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, Northgate Street, Aberystwyth, SY23 2JS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, Tenby Filling Station, Llysonnen Road, Carmarthen, SA33 5DT	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spar, Terrace Road, Aberystwyth, SY23 2AE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, North Parade, Aberystwyth, SY23 2JN	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.9	0.0
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen, SA31 3AX	1.6	3.0	0.2	1.2	12.0	0.2	0.1	0.0	0.0	0.6	0.0	0.0	7.2	0.0	0.0	10.7	0.3
Tesco Extra, Pontardulais Road, Cadle, Fforest-fach, Swansea, SA5 4BA	0.0	0.0	0.0	0.0	0.0	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Superstore, Aberystwyth Road, New Town, Cardigan, SA43 1NA	0.4	1.0	0.1	0.0	0.0	0.00	0.0	0.0	0.0	2.1	0.0	0.0	5.0	0.0	0.0	7.5	0.1
Tesco Superstore, Park Avenue, Aberystwyth, SY23 1PB	0.1	2.5	0.1	0.0	0.0	0.00	2.4	0.0	0.0	4.1	55.0	0.2	0.3	0.0	0.0	6.9	0.3
Tesco Superstore, Park Street, Ammanford, SA18 2LR	0.0	0.0	0.0	0.5	0.0	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0
The Village Shop, Towy Terrace, Ffairfach, Llandeilo, SA19 6ST	0.0	0.0	0.0	0.0	0.0	0.00	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0
Y Sied Goffi, St Catherine's Walk, Carmarthen, SA31 1GA	0.0	0.0	0.0	0.0	0.0	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	35.9	100	5.1	16.1	100	1.3	13.7	100	0.6	26.9	100	0.3	36.0	100	0.7	128.6	8.1

Notes
Patterns of trade diversion based upon existing market share levels, gap analysis and location and retail offer of existing LAD stores
figures may not add due to rounding

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 12: Trading effects of the proposed development, 2030

	Turnover 2025			Total Turnover 2025	Turnover 2030			Total Turnover 2030	Trade Diversion				Resultant Turnover 2030	Impact			
	Convenience	Comparison	inflow		Convenience	Comparison	inflow		Convenience		Comparison			Change 2025-30		2030 Impact	
	£m	£m	%	£m	£m	£m	%	£m	%	£m			£m	£m	%	£m	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]				[10]	[11]	[12]	[13]	[14]
Primary Catchment Area																	
Lampeter TC																	
Sainsbury's, Market Street, Lampeter, SA48 7DS	30.4	2.3	15	37.6	29.5	2.6	15	36.8	26	2.31	4	0.1	34.5	-3.13	-8.3	-2.37	-6.4
Premier, High Street, Lampeter, SA48 7BG	0.3		15	0.3	0.3		15	0.3									
Local shops, Lampeter Town Centre	1.0	16.8	15	20.5	1.0	18.6	15	22.5	1	0.09	33	0.4	22.0	1.49	7.3	-0.54	-2.4
Lampeter TC Total	31.7	19.1	15	58.4	30.7	21.1	15	59.6	27	2.40	37	0.5	56.7	-1.64	-2.8	-2.91	-4.9
Lampeter Out of Centre																	
Co-op, Bridge Street, Lampeter, SA48 7AF	9.1	0.2	12	10.4	8.8	0.2	12	10.2	8	0.71	1	0.01	9.4	-1.01	-9.6	-0.73	-7.1
Beyond PCA																	
Aberaeron TC																	
Costcutter, Market Street, Aberaeron, SA46 0AS	2.9		12	3.2	2.8	0.0	12	3.1	2	0.18			2.9	-0.27	-8.5	-0.18	-5.7
Local shops, Aberaeron Town Centre	0.1	3.0	12	3.4	0.1	3.3	12	3.7			1	0.01	3.7	0.34	10.0	-0.01	-0.4
Costcutter, Uplands Square, New Quay, SA45 9QH	0.6		12	0.7	0.6	0.0	12	0.7	1	0.09		0.0	0.6	-0.11	-15.6	-0.09	-13.0
CK's Supermarket, Pencader Road, Pontwelly, Llandysul, SA44 4AE	3.3		12	3.6	3.2	0.0	12	3.5	2	0.18		0.0	3.4	-0.29	-7.9	-0.18	-5.0
Spar, Lincoln Street, Llandysul, SA44 4BU	2.6		12	2.9	2.5	0.0	12	2.8	1	0.09		0.0	2.7	-0.18	-6.0	-0.09	-3.1
Aberystwyth																	
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL	5.3		12	5.9	5.1	0.0	12	5.8	12	1.07	10	0.1	4.6	-1.38	-23.3	-1.20	-20.9
Tesco Superstore, Park Avenue, Aberystwyth, SY23 1PB	6.9		12	7.7	6.7	0.0	12	7.5	3	0.27		0.0	7.2	-0.50	-6.5	-0.27	-3.6
Aberystywyth Town Centre		16.3	12	18.2	0.0	18.0	12	20.2		0.00	12	0.2	20.0	1.79	9.8	-0.16	-0.8
Aberyswyth Out of Centre																	
Morrisons, Parcydolau, Aberystwyth, SY23 3TL	9.4	0.6	12	11.2	9.1	0.6	12	10.9	4	0.36			10.6	-0.60	-5.4	-0.36	-3.3
Carmarthen TC		17.1	12	19.1	0.0	18.9	12	21.2			12	0.2	21.0	1.88	9.8	-0.16	-0.8
Carmarthen Out of Centre																	
Aldi, Stephens Way, Carmarthen, SA31 2BG	7.2		12	8.1	7.0	0.0	12	7.8	13	1.16	17	0.2	6.4	-1.63	-20.2	-1.39	-17.8
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen, SA31 3AX	10.7		12	12.0	10.4	0.0	12	11.6	4	0.36		0.0	11.3	-0.71	-6.0	-0.36	-3.1
Lidl, Friars Park, Carmarthen, SA31 3FF	1.9		12	2.1	1.8	0.0	12	2.0	9	0.80		0.0	1.2	-0.86	-41.2	-0.80	-39.4
Morrisons, Parc Pensarn, Carmarthen, SA31 2NF	1.3		12	1.4	1.2	0.0	12	1.4	4	0.36		0.0	1.0	-0.40	-28.2	-0.36	-26.0
Inflow									10	0.89	10	0.1					
									100	8.9	100	1.4					

Notes
[1] [2] taken from table 7/8
[3] allowance for inflow as per SWWRRS
[4] = [1]+[2] inc. [3]
[5]&[6] Allowance made for turnover of existing facilities to gain from pro-rata growth in expenditure to 2030 in line with Table 4a/5a.
[8]=[5]+[6] inc. [7]
[9] CS estimate reflective of existing stores trading position
[10] =[8]-[9]
[11]=[10]-[4]
[12]=[10]-[4]/[4]*100
[13]=[10]-[8]
[14]=[10]-[8]/[8]6*100

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 13: Trading effects of the proposed development, 2030 - Sensitvity Test

Sensitvity Test																	
	Turnover 2025			Total Turnover 2025	Turnover 2030			Total Turnover 2030	Trade Diversion				Resultant Turnover 2030	Impact			
	Convenience	Comparison	inflow		Convenience	Comparison	inflow		Convenience		Comparison			Change 2025-30		2030 Impact	
	£m	£m	%	£m	£m	£m	%	£m	%	£m			£m	£m	%	£m	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]				[10]	[11]	[12]	[13]	[14]
Primary Catchment Area																	
Lampeter TC																	
Sainsbury's, Market Street, Lampeter, SA48 7DS*	20.2	2.3	15	25.9	19.6	2.6	15	25.5	26	2.31	4	0.1	23.1	-2.78	-10.7	-2.37	-9.3
Premier, High Street, Lampeter, SA48 7BG	0.3		15	0.3	0.3		15	0.3									
Local shops, Lampeter Town Centre	1.0	16.8	15	20.5	1.0	18.6	15	22.5	1	0.09	33	0.4	22.0	1.49	7.3	-0.54	-2.4
Lampeter TC Total	21.5	19.1	15	46.7	20.9	21.1	15	48.3	27	2.40	37	0.5	45.4	-1.30	-2.8	-2.91	-6.0
Lampeter Out of Centre																	
Co-op, Bridge Street, Lampeter, SA48 7AF	9.1	0.2	12	10.4	8.8	0.2	12	10.2	8	0.71	1	0.01	9.4	-1.01	-9.6	-0.73	-7.1
Beyond PCA																	
Aberaeron TC																	
Costcutter, Market Street, Aberaeron, SA46 0AS	2.9		12	3.2	2.8	0.0	12	3.1	2	0.18			2.9	-0.27	-8.5	-0.18	-5.7
Local shops, Aberaeron Town Centre	0.1	3.0	12	3.4	0.1	3.3	12	3.7			1	0.01	3.7	0.34	10.0	-0.01	-0.4
Costcutter, Uplands Square, New Quay, SA45 9QH	0.6		12	0.7	0.6	0.0	12	0.7	1	0.09		0.0	0.6	-0.11	-15.6	-0.09	-13.0
CK's Supermarket, Pencader Road, Pontwelly, Llandysul, SA44 4AE	3.3		12	3.6	3.2	0.0	12	3.5	2	0.18		0.0	3.4	-0.29	-7.9	-0.18	-5.0
Spar, Lincoln Street, Llandysul, SA44 4BU	2.6		12	2.9	2.5	0.0	12	2.8	1	0.09		0.0	2.7	-0.18	-6.0	-0.09	-3.1
Aberystwyth																	
Lidl, Rheidol Retail Park, Alexandra Road, Aberystwyth, SY23 1LL	5.3		12	5.9	5.1	0.0	12	5.8	12	1.07	10	0.1	4.6	-1.38	-23.3	-1.20	-20.9
Tesco Superstore, Park Avenue, Aberystwyth, SY23 1PB	6.9		12	7.7	6.7	0.0	12	7.5	3	0.27		0.0	7.2	-0.50	-6.5	-0.27	-3.6
Aberystywyth Town Centre		16.3	12	18.2	0.0	18.0	12	20.2		0.00	12	0.2	20.0	1.79	9.8	-0.16	-0.8
Aberyswyth Out of Centre																	
Morrisons, Parcydolau, Aberystwyth, SY23 3TL	9.4	0.6	12	11.2	9.1	0.6	12	10.9	4	0.36			10.6	-0.60	-5.4	-0.36	-3.3
Carmarthen TC		17.1	12	19.1	0.0	18.9	12	21.2			12	0.2	21.0	1.88	9.8	-0.16	-0.8
Carmarthen Out of Centre																	
Aldi, Stephens Way, Carmarthen, SA31 2BG	7.2		12	8.1	7.0	0.0	12	7.8	13	1.16	17	0.2	6.4	-1.63	-20.2	-1.39	-17.8
Tesco Extra, Lon Y Plas, Morfa Lane, Carmarthen, SA31 3AX	10.7		12	12.0	10.4	0.0	12	11.6	4	0.36		0.0	11.3	-0.71	-6.0	-0.36	-3.1
Lidl, Friars Park, Carmarthen, SA31 3FF	1.9		12	2.1	1.8	0.0	12	2.0	9	0.80		0.0	1.2	-0.86	-41.2	-0.80	-39.4
Morrisons, Parc Pensarn, Carmarthen, SA31 2NF	1.3		12	1.4	1.2	0.0	12	1.4	4	0.36		0.0	1.0	-0.40	-28.2	-0.36	-26.0
Inflow									10	0.89	10	0.1					
									100	8.9	100	1.4					

Notes
[1] [2] taken from table 7/8
[3] allowance for inflow as per SWWRRS
[4] = [1]+[2] inc. [3]
[5]&[6] Allowance made for turnover of existing facilities to gain from pro-rata growth in expenditure to 2030 in line with Table 4a/5a.
[8]=[5]+[6] inc. [7]
[9] CS estimate reflective of existing stores trading position
[10] =[8]-[9]
[11]=[10]-[4]
[12]=[10]-[4]/[4]*100
[13]=[10]-[8]
[14]=[10]-[8]/[8]6*100
* Sainsburys Convenience turnover

2023 prices

Lidl Great Britain Ltd
Land at A485 Cwmann, Lampeter

Table 12A Existing Store convenience turnovers, Lampeter 2030 - Sensitivity Test

Sensitvity Test

	Gross Internal Area (sqm)	Convenience Net Sales (sqm)	Convenience Benchmark Sales Density (£/sqm)	Benchmark Turnover (£m)	SWRRS Sainsbury's turnover (adj 2023 price base) (£m)	Sainsbury's turnover (Adjusted) +12% b/m inc. inflow (£m)	Over/under Trading +/- (£m)	Pre-Development Sales Density (£/sqm)	Post-development Turnover 2030 (£m)	Post Development Sales Density (£/sqm)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]
Sainsburys, Market Street	1,384	1,246	13,869	17.3	18.1	23.3	6.0	18,674	20.9	16,817
Nexus impact assessment			*13,869*			*23.3*	6.0	18,674	*17.6*	14,098

Notes
[1] IGD (est.)
[2] estimated 90%
[3] GlobalData Mar 2025 (at 2023 prices)
[4] =[2]*[3]/1,000,000
[5] SWRRRS Table 4, App 5 price base adjusted
[6] =[5] +12% + inflow
[7] = [6]-[4]
[8] = [6]/[2]*1,000,000
[9]=[6]-£2.62m/£5.7m
[10]=[9]/[2]*1,000,000

2023 prices