



Braintree District Council

Retail and Leisure Evidence Study | Briefing Note

Our ref 72718/01/NG/JS
Date 15 September 2026
From Lichfields

Regulation. 19 Local Plan Update

1.0 Introduction

- 1.1 Lichfields was instructed to prepare a District-wide Retail and Leisure Evidence Study for the Council in 2024 (RLS 2024), which provided supporting evidence for the emerging Local Plan Review 2043 (LRP). This RLS followed similar studies for the Council in 2012, 2015 and a partial update in 2018.
- 1.2 This briefing note assesses the implications of more recent changes to population and expenditure projections and extending the plan period to 2043, as well as consideration of capacity for new local centres at larger strategic sites.

2.0 Population

- 2.1 Lichfields' RLS 2024 adopted ONS-based population projections from Experian, which suggested that Braintree District's population would increase by 15,363 (5.8%) over the plan period, from 265,760 in 2024 to 281,123 in 2041.
- 2.2 The updated 2026 base population figure assumed in this updated position note is 275,110. The latest Experian population projections show the District's population to grow by 27,686 (10.1%) over the revised plan period to 302,796 in 2043. Updated population projections for the study area zones are shown in Table 1 below.

Table 1 Study area population

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	65,015	65,820	67,856	69,888	71,814
Zone 2 - Rural West	52,004	52,943	55,331	57,453	59,408
Zone 3 - Witham	61,584	62,376	64,360	66,038	67,550
Zone 4 - Halstead	44,081	44,525	45,494	46,325	47,165
Zone 5 - Rural North	52,426	52,946	54,280	55,573	56,859
Total	275,110	278,610	287,321	295,277	302,796

Source: Experian Population Projections (2026)

3.0 Expenditure

- 3.1 Base year local expenditure per capita estimates for the study area zones were derived from Experian and projected forward based on Experian's recommended forecasts at that time, provided in their Retail Planner Briefing Note 21 published in February 2024. The 2024 RLS also adopted Experian's recommended forecast for changes in special forms of trading (SFT), which is deducted from available expenditure.
- 3.2 This briefing note includes new forecasts utilising Experian's latest Retail Planner Briefing Note 23, published in March 2026. All monetary values expressed in this briefing note are at 2024 prices, consistent with Experian's latest expenditure information. The RLS 2024 adopted a 2022 price base and therefore the figures are not directly comparable.
- 3.3 Updated expenditure (at 2024 prices) per capita with SFT deducted is shown in Table 2 (convenience goods retail), Table 3 (comparison goods retail) and Table 4 (food/beverage). Updated population and expenditure per capita projections have been combined to recalculate total expenditure available in the study area zones in Tables 5, 6 and 7.

Table 2 Convenience goods expenditure per person (£)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	2,740	2,712	2,663	2,616	2,582
Zone 2 - Rural West	2,931	2,902	2,848	2,799	2,762
Zone 3 - Witham	2,806	2,777	2,727	2,679	2,644
Zone 4 - Halstead	2,902	2,872	2,820	2,771	2,734
Zone 5 - Rural North	2,812	2,784	2,733	2,685	2,650

Experian Local Expenditure 2024 (published 2026, 2024 prices) and Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 Comparison goods expenditure per person (£)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	3,057	3,141	3,482	3,864	4,317
Zone 2 - Rural West	3,425	3,520	3,901	4,329	4,837
Zone 3 - Witham	3,142	3,229	3,579	3,972	4,438
Zone 4 - Halstead	3,263	3,354	3,717	4,125	4,609
Zone 5 - Rural North	3,084	3,170	3,513	3,899	4,356

Table 4 Food and beverage expenditure per person (£)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	1,846	1,877	1,981	2,082	2,188
Zone 2 - Rural West	2,012	2,046	2,159	2,269	2,385
Zone 3 - Witham	1,829	1,860	1,963	2,063	2,168
Zone 4 - Halstead	1,847	1,879	1,982	2,083	2,190
Zone 5 - Rural North	1,704	1,733	1,828	1,922	2,020

Table 5 Total convenience goods expenditure (£m)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	178.14	178.51	180.67	182.85	185.40
Zone 2 - Rural West	152.44	153.62	157.61	160.81	164.08
Zone 3 - Witham	172.80	173.24	175.48	176.93	178.59
Zone 4 - Halstead	127.90	127.88	128.28	128.35	128.95
Zone 5 - Rural North	147.44	147.39	148.34	149.24	150.67
Total	778.72	780.65	790.38	798.18	807.69

Source: Tables 1 and 2

Table 6 Total comparison goods expenditure (£m)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	198.73	206.77	236.25	270.05	310.04
Zone 2 - Rural West	178.10	186.34	215.84	248.73	287.37
Zone 3 - Witham	193.52	201.44	230.36	262.32	299.81
Zone 4 - Halstead	143.85	149.33	169.10	191.11	217.40
Zone 5 - Rural North	161.69	167.82	190.68	216.66	247.69
Total	875.89	911.70	1,042.23	1,188.87	1,362.31

Source: Tables 1 and 3

Table 7 Total food and beverage expenditure (£m)

Zone	2026	2028	2033	2038	2043
Zone 1 - Braintree	120.01	123.57	134.42	145.51	157.14
Zone 2 - Rural West	104.62	108.33	119.46	130.37	141.68
Zone 3 - Witham	112.65	116.05	126.34	136.25	146.48
Zone 4 - Halstead	81.43	83.65	90.19	96.52	103.28
Zone 5 - Rural North	89.32	91.74	99.24	106.79	114.83
Total	508.02	523.33	569.65	615.44	663.42

Source: Tables 1 and 4

4.0 Updated floorspace capacity

- 4.1 The updated District-wide floorspace projection, based on the new population, expenditure, SFT and sales density data outlined above, are shown in Tables 8 and 9 (convenience goods retail), Table 10 (comparison goods retail) and Table 11 (food/beverage). The full set of statistical analysis is provided at Appendix 2, 3, and 4.
- 4.2 The update has adopted shopping expenditure patterns in the 2026 base year within each study area zone from the 2024 RLS. These market shares or penetration rates were calculated from the results of a household shopper survey in July 2024.
- 4.3 For convenience goods, the survey derived turnover is compared to the ‘benchmark’ turnovers as was carried out for the 2024 RLS. In 2026, existing facilities generated a benchmark turnover of £352.4m, based on the size of store and the company average sales density, against £429.7m of available resident expenditure based on current market shares (Table 11, Appendix 2). This indicates an existing under-performance of convenience retail facilities of £77.3m.

Table 8 Convenience goods floorspace capacity (2026 to 2043) - accounting for underperformance against benchmark

Area	2026	2028	2033	2038	2043
Turnover Density New Floorspace (£ per sqm)	£11,330	£11,330	£11,319	£11,262	£11,206
Sales Floorspace Projection (sqm net)					
Braintree	2,510	2,540	2,740	2,990	3,260
Great Notley	950	970	1,040	1,120	1,210
Witham	2,440	2,470	2,620	2,760	2,920
Halstead	400	400	420	450	510
Other Braintree District	520	520	560	600	650
Total	6,820	6,900	7,380	7,920	8,550
Floorspace Projection (sqm gross)					
Braintree	3,590	3,630	3,910	4,270	4,660
Great Notley	1,360	1,390	1,490	1,600	1,730
Witham	3,490	3,530	3,740	3,940	4,170
Halstead	570	570	600	640	730
Other Braintree District	740	740	800	860	930
Total	9,750	9,860	10,540	11,310	12,220

- 4.4 Notably, the previous study had suggested a slight overperformance where existing facilities benchmark turnovers were c. £13m less than available resident expenditure at the time (resulting in an expenditure deficit). This is a result of a fall in company average sales densities (i.e. convenience stores are not performing as strongly) and an increase in both population and expenditure per capita (i.e. more residents, spending more on convenience goods) over the intervening years.
- 4.5 To ensure that the updated assessment addresses capacity generated by the additional population over the plan period (rather than short-term store performance), we have adopted the approach that convenience goods retailers across the Study Area are trading ‘at

equilibrium' at 2026 (which adopts the survey derived turnover) and examine capacity by measuring the growth in available expenditure to 2043.

Table 9 Convenience goods floorspace capacity (2026 to 2043) - at equilibrium

Area	2026	2028	2033	2038	2043
Turnover Density New Floorspace (£ per sqm)	£11,330	£11,330	£11,307	£11,262	£11,217
Sales Floorspace Projection (sqm net)					
Braintree	0	30	230	480	750
Great Notley	0	10	80	170	260
Witham	0	30	170	320	470
Halstead	0	0	20	50	110
Other Braintree District	0	10	40	80	130
Total	0	80	540	1,100	1,720
Floorspace Projection (sqm gross)					
Braintree	0	40	330	690	1,070
Great Notley	0	10	110	240	370
Witham	0	40	240	460	670
Halstead	0	0	30	70	160
Other Braintree District	0	10	60	110	190
Total	0	100	770	1,570	2,460

Table 10 Comparison goods floorspace capacity (2026 to 2043)

Area	2026	2028	2033	2038	2043
Turnover Density New Floorspace (£ per sqm)	£6,000	£6,248	£7,001	£7,844	£8,788
Sales Floorspace Projection (sqm net)					
Braintree	-	-10	540	1,060	1,720
Great Notley	-	0	20	50	80
Braintree Village Shopping Centre	-	0	190	370	590
Witham	-	0	120	230	350
Halstead	-	-10	40	90	170
Other Braintree District	-	0	10	30	50
Total	-	-20	920	1,830	2,960
Floorspace Projection (sqm gross)					
Braintree	-	-10	770	1,510	2,460
Great Notley	-	0	30	70	110
Braintree Village Shopping Centre	-	0	270	530	840
Witham	-	0	170	330	500
Halstead	-	-10	60	130	240
Other Braintree District	-	0	10	40	70
Total	-	-20	1,310	2,610	4,220

Table 11 Food and beverage floorspace capacity (2026 to 2043)

Area	2026	2028	2033	2038	2043
Turnover Density New Floorspace (£ per sqm)	£6,000	£6,000	£6,060	£6,121	£6,183
Sales Floorspace Projection (sqm net)					
Braintree	-	520	1,890	3,240	4,630
Great Notley	-	50	180	310	440
Braintree Village Shopping Centre	-	50	190	330	480
Witham	-	210	760	1,280	1,810
Halstead	-	100	340	570	810
Other Braintree District	-	440	1,600	2,720	3,890
Total	-	1,370	4,960	8,450	12,060

- 4.6 Taking account of the NPPF's requirement to meet need "looking at least 10 years ahead" (para 90.d), the updated convenience retail projection to 2038 is **2,460 sqm gross**, compared with a negative capacity of **-830 sqm gross** up to 2036 estimated in the 2024 RLS. As highlighted above, the new projected capacity is higher because of increases in population growth and expenditure per capita levels.
- 4.7 The updated comparison retail projection to 2038 is **4,220 sqm gross**, compared with **2,440 sqm gross** up to 2036 estimated in the 2024 RLS. In addition to higher population and expenditure per capita (i.e. higher resident spending), lower projected sales densities and resulting store turnovers over the assessment period has resulted in a higher projected over-supply.
- 4.8 The updated food/beverage projection to 2038 is **12,060 sqm net**, compared with **6,720 sqm net** up to 2036 estimated in the 2024 RLS. The increase in projected capacity is predominantly due to higher levels of population growth, alongside increased expenditure projections per capita.

5.0 Leisure, entertainment and cultural capacity

- 5.1 Experian's projections and local expenditure data for the household study area indicates the resident population generates £130.13 million in 2026 (an average of £473 per person) on selected cultural, recreational and sporting services, including:
- cinema admissions £6.19 million;
 - live entertainment i.e. theatre/concerts/shows £24.92 million;
 - museums, theme parks, houses and gardens £7.73 million;
 - admissions to clubs, dances, discos, bingo £13.42 million;
 - other miscellaneous entertainment £32.34 million;
 - subscriptions to sports and social clubs £24.93 million; and,
 - leisure class fees £20.60 million.

5.2

- 5.3 Leisure, entertainment and cultural expenditure has been projected to 2043 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 23 – March 2026). Taking population changes into account leisure expenditure is projected to increase by 27.9% from £130.13 million in 2026 to £166.46 million in 2043.
- 5.4 Not all leisure/cultural expenditure from study area residents is spent in Braintree District. The 2024 household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area. Around 11% of households did not participate in any of the leisure activities explored by the household survey.
- 5.5 The participation and retention rates varied significantly for each activity. Many residents travelled outside Braintree e.g. to Chelmsford, Colchester, Cambridge, Bury St. Edmunds, and Central London for leisure activities.
- 5.6 Residents in Braintree District have relatively limited access to the full range of commercial leisure and entertainment facilities within the District, therefore the retention rates for some activities are relatively low. Residents need to travel outside of the District for some commercial leisure uses.
- 5.7 The household survey results and Experian's expenditure figures have been used to estimate Braintree's combined leisure, entertainment and cultural expenditure market share within the study area. Taking the existing leisure trip retention rates into account and the split of cultural/entertainment expenditure between activities would suggest that Braintree currently attracts around 40% of residents' total leisure expenditure within the study area, about £52.1 million of the £130.1 million total.
- 5.8 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +1.7% between 2026 to 2028, +7.3% between 2026 to 2033, +12.8% between 2026 to 2038, and by +18.5% between 2026 to 2043.
- 5.9 With population growth (+4.4% by 2033 and +10.1% by 2043) and retained expenditure (40%) on these leisure/cultural activities, expenditure should increase from £52.1 million in 2026, to £53.6 million by 2028, £57.7 by 2033, £61.8 by 2038 and then £66.6 million in 2043. This equates to an additional +£1.6 million by 2028, +£5.6 million by 2033, +£9.7 million by 2038 or +£14.5 million by 2043.
- 5.10 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross in 2026, which is forecast for the assessment years based on Experian's projected growth in leisure sales densities. If leisure/cultural expenditure attracted to Braintree increased as indicated above, this additional expenditure could support about 630 sq.m gross of new commercial leisure and cultural floorspace by 2028, increasing to 2,050 sq.m gross by 2033, 3,400 sq.m gross by 2038 and 5,030 sq.m gross by 2043.
- 5.11 This analysis provides a broad brush global floorspace capacity analysis and assumes Braintree District will continue to retain, as a minimum, a relatively low (40%) proportion of leisure expenditure within the study area.

6.0 Strategic site capacities

- 6.1 We have also undertaken initial high-level calculations to identify the possible parameters and capacity for new main town centre uses provision across three Strategic Growth Locations identified by Council officers.
- 6.2 It is important to caveat that the capacity figures provided are indicative of how much main town centre uses that these sites could accommodate to aid the Council in planning for the future as a benchmark. They are based on assumptions that will change over time to reflect market trends and should not be taken to represent a specific target or minimum/maximum parameters.
- 6.3 It will be for developers of individual sites to demonstrate that the extent of any local centres and quantum and mix of floorspace meets the new populations' needs as part of any subsequent applications.
- 6.4 Key assumptions for the high-level analysis include:
- A convenience goods retention rate of 25% of new resident spend to be undertaken locally within small top-up convenience stores and larger foodstores to be provided within new centres in the large sites and new settlements. Local consideration may support planning for higher (or lower) levels of retention, and any future assessments and applications should provide evidence such an approach. The future spend per capita has been taken for 2043 (accounting for projected changes in spending patterns including the proportion of spending made online) from the Study Area zone in which the sites are located, as well as an average sales density in 2043.
 - For comparison goods, a lower retention rate of 5% has been adopted reflecting the need for a balance between the retail hierarchy and the sites' locations as urban extensions to existing settlements, and the need for local provision to encourage sustainable shopping patterns. A similar zonal approach has been taken to spend per capita, and a 2043 sales density has been adopted.
 - A rate of 10% is adopted for food and beverage retention, again recognising the role of the sites as urban extensions, as well as the need for a range and variety of provision for residents. No one centre is likely to cater to all of its local population's food and beverage spending.
 - There is no industry standard methodology for calculating the capacity for other non-retail service uses (e.g. hairdressers, barbers, beauty salons, estate agents, solicitor/financial services, travel agents etc.). Lichfields would normally expect at least 20% of total floorspace across a local centre to be occupied by these non-retail service uses.

East of Braintree

- 6.5 Braintree District Council officers identify that East of Braintree will feature 2,600 new homes, 1,840 of which are to come forward by the end of the 2043 plan period. These new homes could accommodate a population of 4,324 over the plan period, with a total population of 6,110 post-2043.

- 6.6 Over the plan period, this would generate c.£39.3m of spending. Based on the assumed retention rates, this would equate to c.£2.8m of convenience goods expenditure, c.£0.9m of comparison goods expenditure, and c.£0.9m on food and beverages.
- 6.7 Adopting sales densities for 2043 and suitable net-to-gross ratios would give a site capacity of approximately 800 sqm (gross internal areas) over the plan period:
- Convenience goods floorspace 350 sqm
 - Comparison goods floorspace 150 sqm
 - Food and beverage floorspace 150 sqm
 - Non-retail services 150 sqm
- 6.8 Notably, there is a significant additional population to come forward after the 2043 plan period. Collectively, over the life of the development, the East of Braintree population would generate c.£3.9m of convenience goods expenditure, c.£1.3m of comparison goods expenditure, and c.£1.3m of food and beverages expenditure.
- 6.9 In total, the planned population of the settlement at East of Braintree could support a total floorspace of 1,150 sqm, of which 500 sqm is for convenience goods, 200 sqm is for comparison goods, 200 sqm is for food and beverage, and 250 sqm for non-retail services.
- 6.10 As noted at Paragraph 6.3, retailer formats and occupier interest are likely to evolve over time, responding to prevailing market trends. The allocation should take a flexible approach to applying the floorspace identified, which is likely to come forward as a small parade of shops. The applications associated with the future delivery of the allocation may also adopt (where evidenced and justified) a different approach and assumptions to assessing the capacity and need for main town centre uses across East of Braintree.

Kings Dene - North, West and Southwest of Kelvedon

- 6.11 Kings Dene will provide 5,600 dwellings, including 2,344 over the plan period. The planned residential population for the Kings Dene allocation is 5,508 by 2043, out of a total 13,160.
- 6.12 This population would (based on the assumptions set out above) generate expenditure to support the 1,000sqm of floorspace over the plan period:
- Convenience goods floorspace 450 sqm
 - Comparison goods floorspace 150 sqm
 - Food and beverage floorspace 200 sqm
 - Non-retail services 200 sqm
- 6.13 The post-plan population would increase the capacity for a new centre to 2,450 sqm in total, comprising 1,100 sqm for convenience goods, 400 sqm for comparison goods, 450 sqm for food and beverage, and 500 sqm for non-retail services.
- 6.14 The allocation should be applied flexibly. Whilst the floorspace identified could be delivered as a small supermarket (taking account of the post-plan population), occupier needs are

likely to change over time. The planning application for the site may also use alternative assumptions to assess the need for such main town centre uses, where justified by evidence.

Land South and Northeast of Halstead

- 6.15 The planned extension is made up of two parcels for 2,850 new dwellings at Land South and Northeast of Halstead, which would collectively support 6,698 residents to be delivered over the plan period.
- 6.16 This population could provide for 1,300 sqm of main town centre uses, as follows:
- Convenience goods floorspace 600 sqm
 - Comparison goods floorspace 200 sqm
 - Food and beverage floorspace 250 sqm
 - Non-retail services 250 sqm
- 6.17 Retail needs may change over time, so the allocation should be applied flexibly with provision likely to come forward as a small parade of shops. Where justified, future applications may adopt alternative assumptions.

Land North of A12, Hatfield Peverel

- 6.18 The development at Land North of A12 in Hatfield Peverel is for 1,123 dwellings, to be delivered over the plan period. The 1,123 homes would equate to a resident population of 2,639 by 2043.
- 6.19 The resident population over the plan period could support 500 sqm of floorspace:
- Convenience goods floorspace 200 sqm
 - Comparison goods floorspace 100 sqm
 - Food and beverage floorspace 100 sqm
 - Non-retail services 100 sqm
- 6.20 These figures could support a small parade of shops, but reflect rounding associated with capacity modelling (to avoid overly precise interpretation) and should allow a degree of flexibility. Future applications may also use alternative assumptions, where supported by evidence.

7.0 Accommodating growth

- 7.1 The combined retail and food/beverage floorspace projections (cumulative) are as follows:

Table 12 Total floorspace capacity (sqm gross) - cumulative

	2028	2033	2038	2043
Convenience goods floorspace	100	770	1,570	2,460
Comparison goods floorspace	-20	1,310	2,610	4,220
Total retail floorspace	80	2,080	4,180	6,680

	2028	2033	2038	2043
Food and beverage floorspace	1,370	4,960	8,450	12,060
Total cumulative floorspace	1,450	7,040	12,630	18,740

- 7.2 The NPPF suggests the development plan should plan for at least 10 years. As in the 2024 RLS, the assessment suggests an under-supply of floorspace over this period, due to the increases in population projections and residents' expenditure per capita.
- 7.3 The RLS recommended that the future strategy should continue to assume that vacant units alongside potential allocations and development opportunities can accommodate this growth.
- 7.4 The existing stock of premises could also help to accommodate projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises should help to accommodate future growth.
- 7.5 Since the 2024 RLS, the Quadrant department store in George Yard Shopping Centre in Braintree closed, following the merger of the Chelmsford Star Co-op with the Central Co-op¹. Prior to the October 2025 closure, it was reported² that the store, which had sold bedroom furniture, beds, dining room furniture, flooring, home accessories along with men and women's clothing, had not turned a profit since 2008. Valuation Office (VO) business rates data suggests that the store measures 4,800 sqm (gross). This vacancy alone could accommodate the full extent of the retail (convenience and comparison goods floorspace) capacity identified over the first 10 years of the plan, or the full extent of comparison goods capacity over the whole of the plan period.
- 7.6 The RLS 2024 had identified the potential for the reoccupation of vacancies across the District, with a theoretical capacity to accommodate a minimum of 2,100 sqm gross of vacant floorspace, based on an 8% vacancy rate target (alongside a higher option, based on a 5% vacancy rate target).
- 7.7 The previous study had also considered development opportunities and draft Local Plan allocations across the District. These provided a theoretical capacity to accommodate a further 7,000 sqm to 10,000 sqm gross of retail and food/beverage floorspace over the plan period.
- 7.8 Growth in the food/beverage facilities provide an opportunity to enhance the evening and night-time economy in designated centres (including planned local centres), as well as the repurposing of retail floorspace. However, the nature and format of this sector is constantly evolving to reflect changing customer demands and the commercial viability of such uses. Notwithstanding the quantitative capacity identified, the 2024 RLS did not find any specific qualitative deficiencies or requirements that would justify additional allocations in their own right, and would caution against any allocations without express landowner and/or operator interest.

¹ <https://www.essexlive.news/news/essex-news/quadrant-department-stores-chelmsford-braintree-10298281>

² <https://www.bbc.co.uk/news/articles/cly4qlnvowjo>

- 7.9 The LPR should recognise the potential for additional food/beverage development over the plan period (particularly when aligned with any new mixed-use and residential schemes), balanced against the potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.
- 7.10 Strategic housing developments including sites at East of Braintree, Kings Dene, Land South and Northeast of Halstead and Land North of A12 in Hatfield Peverel (each assessed at Section 5 above) will also accommodate a proportion of the identified population growth.
- 7.11 Given the scale of these strategic developments, new facilities will be needed to cater for day-to-day needs within walking distance of the new homes. The provision of new local shops and services in these developments is expected to meet any residual need for new floorspace over and above the reoccupation of vacant floorspace and existing development opportunities.

Appendix 1 Study Area

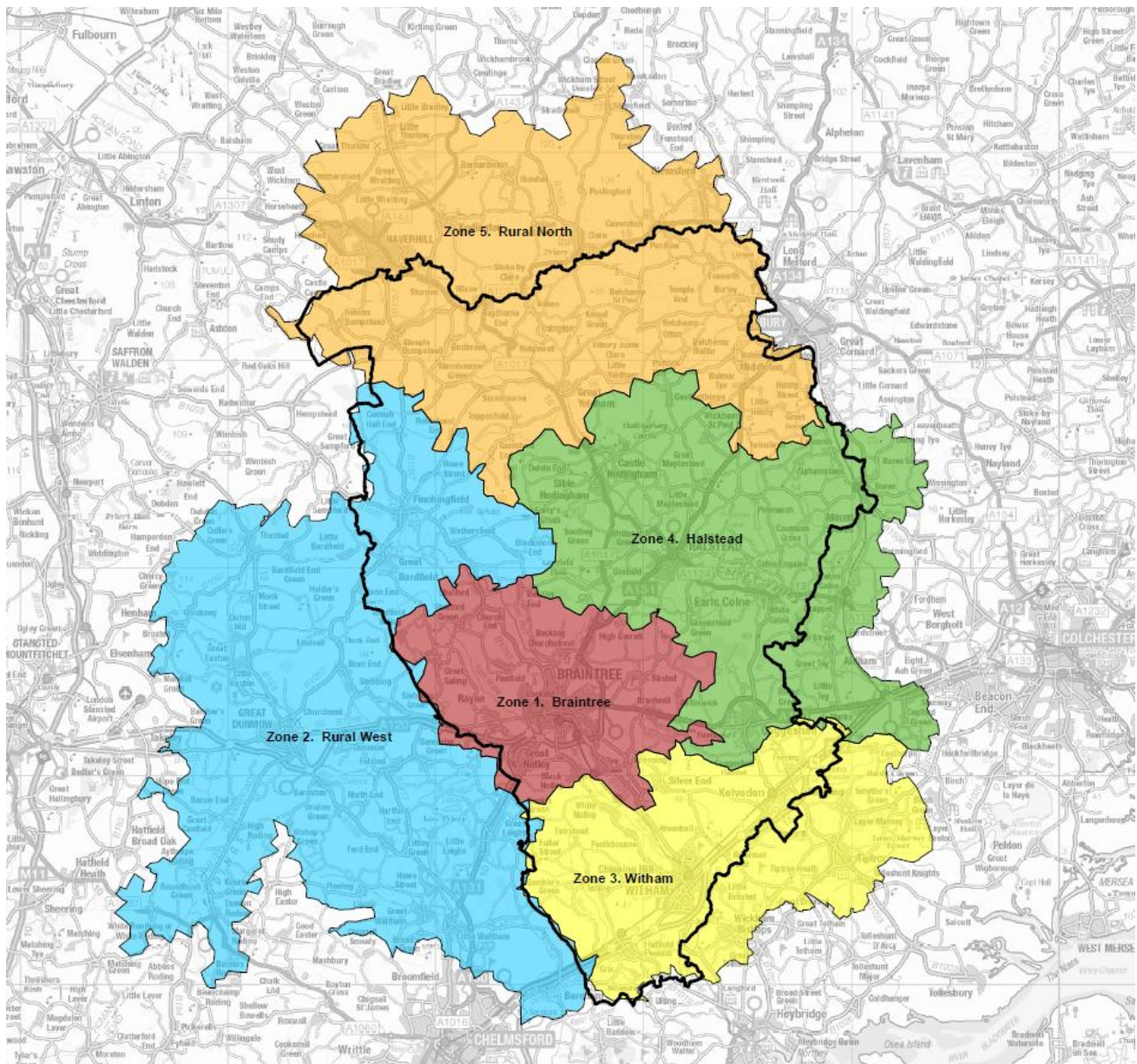


Table 1 Study Area Zones

Zone	Postcode areas
1. Braintree	CM7 1 CM7 2 CM7 3 CM7 5 CM7 9 CM77 6 CM77 7 CM77 8
2. Rural West	CM3 1 CM3 3 CM6 1 CM6 2 CM6 3 CM7 4
3. Witham	CM3 2 CM8 1 CM8 2 CM8 3 CO5 0 CO5 9
4. Halstead	CO6 1 CO6 2 CO8 5 CO9 1 CO9 2 CO9 3
5. Rural North	CB9 0 CB9 7 CB9 8 CB9 9 CO9 4 CO10 7 CO10 8

Appendix 2 Convenience goods capacity

Table 1 - Study area population projections

Zone	2026	2028	2033	2038	2043
1 - Braintree	65,015	65,820	67,856	69,888	71,814
2 - Rural West	52,004	52,943	55,331	57,453	59,408
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4 - Halstead	44,081	44,525	45,494	46,325	47,165
5 - Rural North	52,426	52,946	54,280	55,573	56,859
Total	275,110	278,610	287,321	295,277	302,796

Sources: Experian Population Projections (2026)

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2026	2028	2033	2038	2043
1 - Braintree	2,740	2,712	2,663	2,616	2,582
2 - Rural West	2,931	2,902	2,848	2,799	2,762
3 - Witham	2,806	2,777	2,727	2,679	2,644
4 - Halstead	2,902	2,872	2,820	2,771	2,734
5 - Rural North	2,812	2,784	2,733	2,685	2,650

Sources:

Experian Local Expenditure 2024 (published 2026, 2024 prices) and Retail Planner Briefing Note 23 (March 2026)

Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total convenience goods expenditure (£m)

Zone	2026	2028	2033	2038	2043
1 - Braintree	178.14	178.51	180.67	182.85	185.40
2 - Rural West	152.44	153.62	157.61	160.81	164.08
3 - Witham	172.80	173.24	175.48	176.93	178.59
4 - Halstead	127.90	127.88	128.28	128.35	128.95
5 - Rural North	147.44	147.39	148.34	149.24	150.67
Total	778.72	780.65	790.38	798.18	807.69

Source: Tables 1 and 2

Table 4 - Base year convenience goods market shares by zone (%)

	1	2	3	4	5	Inflow
	Braintree	Rural West	Witham	Halstead	Rural North	
Braintree / Zone 1/2						
Sainsbury's, Tofts Walk	12.5%	1.8%	0.9%	0.8%	0.0%	5.0%
Tesco, Market Place	13.8%	1.4%	0.2%	3.5%	0.0%	5.0%
Tesco, Marks Farm, Braintree	16.3%	1.2%	3.1%	7.4%	0.0%	5.0%
Lidl, Rayne Road, Braintree	11.0%	3.1%	0.0%	2.3%	0.0%	5.0%
Other Braintree	12.9%	1.5%	0.3%	0.4%	0.0%	5.0%
Tesco, Great Notley	21.5%	5.7%	0.1%	0.0%	0.5%	5.0%
Other Zone 1/2 in Braintree District	2.2%	3.1%	0.0%	0.0%	0.0%	2.0%
Braintree/Zone 1/2 Total	90.2%	17.8%	4.6%	14.4%	0.5%	n/a
Witham / Zone 3						
Tesco, Grove Centre	0.0%	0.0%	21.4%	0.0%	0.0%	5.0%
Other Witham Town Centre	0.8%	0.0%	0.2%	0.0%	0.0%	5.0%
Morrisons, Braintree Road, Witham	1.1%	0.3%	14.9%	0.2%	0.0%	5.0%
Asda, Highfields Road, Witham	0.1%	0.7%	10.8%	0.3%	0.0%	5.0%
Aldi, Reid Road, Witham	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Witham	1.5%	0.0%	12.7%	0.0%	0.0%	2.0%
Other Zone 3	0.8%	0.0%	3.4%	0.0%	0.0%	2.0%
Witham/Zone 3 Total	4.3%	1.0%	63.4%	0.5%	0.0%	n/a
Halstead Zone 4/5						
Sainsbury's, High Street	0.0%	0.0%	0.0%	11.7%	0.2%	5.0%
Co-op, Weavers Court	0.0%	0.0%	0.0%	1.1%	0.0%	5.0%
Lidl, Kings Road, Halstead	0.5%	0.0%	0.0%	27.4%	0.7%	5.0%
Other Halstead	0.0%	0.0%	0.0%	2.5%	0.0%	2.0%
Other Zone 4/5 in Braintree District	0.0%	0.0%	1.7%	9.8%	2.4%	2.0%
Halstead/Zone 4/5 Total	0.5%	0.0%	1.7%	52.5%	3.3%	n/a
Braintree District Total	95.0%	18.8%	69.7%	67.4%	3.8%	n/a
Bishops Stortford	0.0%	4.0%	0.0%	0.0%	0.0%	n/a
Chelmsford	2.6%	9.3%	5.3%	0.1%	0.0%	n/a
Colchester	0.7%	0.0%	6.8%	10.9%	0.0%	n/a
Dunmow - Tesco Superstore	0.0%	37.7%	0.0%	0.0%	0.0%	n/a
Sudbury	1.3%	6.4%	0.0%	17.2%	18.6%	n/a
Haverhill	0.0%	0.9%	0.0%	1.6%	68.4%	n/a
Maldon	0.4%	0.1%	2.8%	0.0%	0.0%	n/a
Tiptree	0.0%	0.0%	14.2%	0.8%	0.0%	n/a
Great Dunmow	0.0%	9.9%	0.0%	0.0%	0.0%	n/a
Other	0.0%	12.9%	1.2%	2.0%	9.2%	n/a
Other Sub-Total	5.0%	81.2%	30.3%	32.6%	96.2%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2026 convenience goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2026	178.14	152.44	172.80	127.90	147.44		778.72
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	22.27	2.74	1.56	1.02	0.00	1.45	29.04
Tesco, Market Place	24.58	2.13	0.35	4.48	0.00	1.66	33.20
Tesco, Marks Farm, Braintree	29.04	1.83	5.36	9.46	0.00	2.40	48.09
Lidl, Rayne Road, Braintree	19.59	4.73	0.00	2.94	0.00	1.43	28.70
Other Braintree	22.98	2.29	0.52	0.51	0.00	1.38	27.68
Tesco, Great Notley	38.30	8.69	0.17	0.00	0.74	2.52	50.42
Other Zone 1/2 in Braintree District	3.92	4.73	0.00	0.00	0.00	0.18	8.82
Braintree/Zone 1/2 Total	160.68	27.13	7.95	18.42	0.74	11.03	225.95
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	36.98	0.00	0.00	1.95	38.92
Other Witham Town Centre	1.43	0.00	0.35	0.00	0.00	0.09	1.86
Morrisons, Braintree Road, Witham	1.96	0.46	25.75	0.26	0.00	1.50	29.91
Asda, Highfields Road, Witham	0.18	1.07	18.66	0.38	0.00	1.07	21.36
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.67	0.00	21.94	0.00	0.00	0.50	25.12
Other Zone 3	1.43	0.00	5.88	0.00	0.00	0.15	7.45
Witham/Zone 3 Total	7.66	1.52	109.55	0.64	0.00	5.25	124.63
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	14.96	0.29	0.80	16.06
Co-op, Weavers Court	0.00	0.00	0.00	1.41	0.00	0.07	1.48
Lidl, Kings Road, Halstead	0.89	0.00	0.00	35.05	1.03	1.95	38.91
Other Halstead	0.00	0.00	0.00	3.20	0.00	0.07	3.26
Other Zone 4/5 in Braintree District	0.00	0.00	2.94	12.53	3.54	0.39	19.40
Halstead/Zone 4/5 Total	0.89	0.00	2.94	67.15	4.87	3.28	79.12
Braintree District Total	169.23	28.66	120.44	86.21	5.60	19.56	429.70
Bishops Stortford	0.00	6.10	0.00	0.00	0.00	n/a	6.10
Chelmsford	4.63	14.18	9.16	0.13	0.00	n/a	28.09
Colchester	1.25	0.00	11.75	13.94	0.00	n/a	26.94
Dunmow - Tesco Superstore	0.00	57.47	0.00	0.00	0.00	n/a	57.47
Sudbury	2.32	9.76	0.00	22.00	27.42	n/a	61.50
Haverhill	0.00	1.37	0.00	2.05	100.85	n/a	104.27
Maldon	0.71	0.15	4.84	0.00	0.00	n/a	5.70
Tiptree	0.00	0.00	24.54	1.02	0.00	n/a	25.56
Great Dunmow	0.00	15.09	0.00	0.00	0.00	n/a	15.09
Other	0.00	19.66	2.07	2.56	13.56	n/a	37.86
Other Sub-Total	8.91	123.78	52.36	41.70	141.84	n/a	368.58
TOTAL	178.14	152.44	172.80	127.90	147.44	n/a	798.28

Source: Tables 3 and 4

Table 6 - Future 2028 convenience goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2028	178.51	153.62	173.24	127.88	147.39		780.65
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	22.31	2.77	1.56	1.02	0.00	1.46	29.12
Tesco, Market Place	24.63	2.15	0.35	4.48	0.00	1.66	33.27
Tesco, Marks Farm, Braintree	29.10	1.84	5.37	9.46	0.00	2.41	48.18
Lidl, Rayne Road, Braintree	19.64	4.76	0.00	2.94	0.00	1.44	28.78
Other Braintree	23.03	2.30	0.52	0.51	0.00	1.39	27.75
Tesco, Great Notley	38.38	8.76	0.17	0.00	0.74	2.53	50.58
Other Zone 1/2 in Braintree District	3.93	4.76	0.00	0.00	0.00	0.18	8.87
Braintree/Zone 1/2 Total	161.02	27.34	7.97	18.42	0.74	11.06	226.55
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	37.07	0.00	0.00	1.95	39.03
Other Witham Town Centre	1.43	0.00	0.35	0.00	0.00	0.09	1.87
Morrisons, Braintree Road, Witham	1.96	0.46	25.81	0.26	0.00	1.50	29.99
Asda, Highfields Road, Witham	0.18	1.08	18.71	0.38	0.00	1.07	21.42
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.68	0.00	22.00	0.00	0.00	0.50	25.18
Other Zone 3	1.43	0.00	5.89	0.00	0.00	0.15	7.47
Witham/Zone 3 Total	7.68	1.54	109.84	0.64	0.00	5.27	124.96
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	14.96	0.29	0.80	16.06
Co-op, Weavers Court	0.00	0.00	0.00	1.41	0.00	0.07	1.48
Lidl, Kings Road, Halstead	0.89	0.00	0.00	35.04	1.03	1.95	38.91
Other Halstead	0.00	0.00	0.00	3.20	0.00	0.07	3.26
Other Zone 4/5 in Braintree District	0.00	0.00	2.95	12.53	3.54	0.39	19.40
Halstead/Zone 4/5 Total	0.89	0.00	2.95	67.14	4.86	3.28	79.12
Braintree District Total	169.59	28.88	120.75	86.19	5.60	19.61	430.62
Bishops Stortford	0.00	6.14	0.00	0.00	0.00	n/a	6.14
Chelmsford	4.64	14.29	9.18	0.13	0.00	n/a	28.24
Colchester	1.25	0.00	11.78	13.94	0.00	n/a	26.97
Dunmow - Tesco Superstore	0.00	57.91	0.00	0.00	0.00	n/a	57.91
Sudbury	2.32	9.83	0.00	22.00	27.42	n/a	61.56
Haverhill	0.00	1.38	0.00	2.05	100.82	n/a	104.25
Maldon	0.71	0.15	4.85	0.00	0.00	n/a	5.72
Tiptree	0.00	0.00	24.60	1.02	0.00	n/a	25.62
Great Dunmow	0.00	15.21	0.00	0.00	0.00	n/a	15.21
Other	0.00	19.82	2.08	2.56	13.56	n/a	38.01
Other Sub-Total	8.93	124.74	52.49	41.69	141.79	n/a	369.64
TOTAL	178.51	153.62	173.24	127.88	147.39	n/a	800.26

Source: Tables 3 and 4

Table 7 - Future 2033 convenience goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2033	180.67	157.61	175.48	128.28	148.34		790.38
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	22.58	2.84	1.58	1.03	0.00	1.48	29.50
Tesco, Market Place	24.93	2.21	0.35	4.49	0.00	1.68	33.66
Tesco, Marks Farm, Braintree	29.45	1.89	5.44	9.49	0.00	2.44	48.71
Lidl, Rayne Road, Braintree	19.87	4.89	0.00	2.95	0.00	1.46	29.17
Other Braintree	23.31	2.36	0.53	0.51	0.00	1.41	28.12
Tesco, Great Notley	38.84	8.98	0.18	0.00	0.74	2.57	51.31
Other Zone 1/2 in Braintree District	3.97	4.89	0.00	0.00	0.00	0.18	9.04
Braintree/Zone 1/2 Total	162.96	28.05	8.07	18.47	0.74	11.20	229.51
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	37.55	0.00	0.00	1.98	39.53
Other Witham Town Centre	1.45	0.00	0.35	0.00	0.00	0.09	1.89
Morrisons, Braintree Road, Witham	1.99	0.47	26.15	0.26	0.00	1.52	30.38
Asda, Highfields Road, Witham	0.18	1.10	18.95	0.38	0.00	1.09	21.71
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.71	0.00	22.29	0.00	0.00	0.51	25.51
Other Zone 3	1.45	0.00	5.97	0.00	0.00	0.15	7.56
Witham/Zone 3 Total	7.77	1.58	111.26	0.64	0.00	5.34	126.58
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	15.01	0.30	0.81	16.11
Co-op, Weavers Court	0.00	0.00	0.00	1.41	0.00	0.07	1.49
Lidl, Kings Road, Halstead	0.90	0.00	0.00	35.15	1.04	1.95	39.04
Other Halstead	0.00	0.00	0.00	3.21	0.00	0.07	3.27
Other Zone 4/5 in Braintree District	0.00	0.00	2.98	12.57	3.56	0.39	19.50
Halstead/Zone 4/5 Total	0.90	0.00	2.98	67.34	4.90	3.29	79.41
Braintree District Total	171.64	29.63	122.31	86.46	5.64	19.83	435.50
Bishops Stortford	0.00	6.30	0.00	0.00	0.00	n/a	6.30
Chelmsford	4.70	14.66	9.30	0.13	0.00	n/a	28.78
Colchester	1.26	0.00	11.93	13.98	0.00	n/a	27.18
Dunmow - Tesco Superstore	0.00	59.42	0.00	0.00	0.00	n/a	59.42
Sudbury	2.35	10.09	0.00	22.06	27.59	n/a	62.09
Haverhill	0.00	1.42	0.00	2.05	101.47	n/a	104.94
Maldon	0.72	0.16	4.91	0.00	0.00	n/a	5.79
Tiptree	0.00	0.00	24.92	1.03	0.00	n/a	25.94
Great Dunmow	0.00	15.60	0.00	0.00	0.00	n/a	15.60
Other	0.00	20.33	2.11	2.57	13.65	n/a	38.65
Other Sub-Total	9.03	127.98	53.17	41.82	142.71	n/a	374.71
TOTAL	180.67	157.61	175.48	128.28	148.34	n/a	810.21

Source: Tables 3 and 4

Table 8 - Future 2038 convenience goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2038	182.85	160.81	176.93	128.35	149.24		798.18
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	22.86	2.89	1.59	1.03	0.00	1.49	29.86
Tesco, Market Place	25.23	2.25	0.35	4.49	0.00	1.70	34.03
Tesco, Marks Farm, Braintree	29.80	1.93	5.48	9.50	0.00	2.46	49.18
Lidl, Rayne Road, Braintree	20.11	4.99	0.00	2.95	0.00	1.48	29.53
Other Braintree	23.59	2.41	0.53	0.51	0.00	1.42	28.47
Tesco, Great Notley	39.31	9.17	0.18	0.00	0.75	2.60	52.00
Other Zone 1/2 in Braintree District	4.02	4.99	0.00	0.00	0.00	0.18	9.19
Braintree/Zone 1/2 Total	164.93	28.62	8.14	18.48	0.75	11.34	232.26
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	37.86	0.00	0.00	1.99	39.86
Other Witham Town Centre	1.46	0.00	0.35	0.00	0.00	0.10	1.91
Morrisons, Braintree Road, Witham	2.01	0.48	26.36	0.26	0.00	1.53	30.65
Asda, Highfields Road, Witham	0.18	1.13	19.11	0.39	0.00	1.09	21.90
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.74	0.00	22.47	0.00	0.00	0.51	25.73
Other Zone 3	1.46	0.00	6.02	0.00	0.00	0.15	7.63
Witham/Zone 3 Total	7.86	1.61	112.17	0.64	0.00	5.38	127.67
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	15.02	0.30	0.81	16.12
Co-op, Weavers Court	0.00	0.00	0.00	1.41	0.00	0.07	1.49
Lidl, Kings Road, Halstead	0.91	0.00	0.00	35.17	1.04	1.95	39.08
Other Halstead	0.00	0.00	0.00	3.21	0.00	0.07	3.27
Other Zone 4/5 in Braintree District	0.00	0.00	3.01	12.58	3.58	0.39	19.56
Halstead/Zone 4/5 Total	0.91	0.00	3.01	67.38	4.92	3.29	79.52
Braintree District Total	173.71	30.23	123.32	86.51	5.67	20.01	439.45
Bishops Stortford	0.00	6.43	0.00	0.00	0.00	n/a	6.43
Chelmsford	4.75	14.96	9.38	0.13	0.00	n/a	29.22
Colchester	1.28	0.00	12.03	13.99	0.00	n/a	27.30
Dunmow - Tesco Superstore	0.00	60.63	0.00	0.00	0.00	n/a	60.63
Sudbury	2.38	10.29	0.00	22.08	27.76	n/a	62.50
Haverhill	0.00	1.45	0.00	2.05	102.08	n/a	105.58
Maldon	0.73	0.16	4.95	0.00	0.00	n/a	5.85
Tiptree	0.00	0.00	25.12	1.03	0.00	n/a	26.15
Great Dunmow	0.00	15.92	0.00	0.00	0.00	n/a	15.92
Other	0.00	20.74	2.12	2.57	13.73	n/a	39.16
Other Sub-Total	9.14	130.58	53.61	41.84	143.57	n/a	378.74
TOTAL	182.85	160.81	176.93	128.35	149.24	n/a	818.19

Source: Tables 3 and 4

Table 9 - Future 2043 convenience goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2043	185.40	164.08	178.59	128.95	150.67		807.69
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	23.18	2.95	1.61	1.03	0.00	1.51	30.28
Tesco, Market Place	25.59	2.30	0.36	4.51	0.00	1.72	34.48
Tesco, Marks Farm, Braintree	30.22	1.97	5.54	9.54	0.00	2.49	49.76
Lidl, Rayne Road, Braintree	20.39	5.09	0.00	2.97	0.00	1.50	29.94
Other Braintree	23.92	2.46	0.54	0.52	0.00	1.44	28.87
Tesco, Great Notley	39.86	9.35	0.18	0.00	0.75	2.64	52.78
Other Zone 1/2 in Braintree District	4.08	5.09	0.00	0.00	0.00	0.19	9.35
Braintree/Zone 1/2 Total	167.23	29.21	8.22	18.57	0.75	11.49	235.47
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	38.22	0.00	0.00	2.01	40.23
Other Witham Town Centre	1.48	0.00	0.36	0.00	0.00	0.10	1.94
Morrisons, Braintree Road, Witham	2.04	0.49	26.61	0.26	0.00	1.55	30.95
Asda, Highfields Road, Witham	0.19	1.15	19.29	0.39	0.00	1.11	22.11
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.78	0.00	22.68	0.00	0.00	0.52	25.98
Other Zone 3	1.48	0.00	6.07	0.00	0.00	0.15	7.71
Witham/Zone 3 Total	7.97	1.64	113.22	0.64	0.00	5.44	128.92
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	15.09	0.30	0.81	16.20
Co-op, Weavers Court	0.00	0.00	0.00	1.42	0.00	0.07	1.49
Lidl, Kings Road, Halstead	0.93	0.00	0.00	35.33	1.05	1.96	39.28
Other Halstead	0.00	0.00	0.00	3.22	0.00	0.07	3.29
Other Zone 4/5 in Braintree District	0.00	0.00	3.04	12.64	3.62	0.39	19.68
Halstead/Zone 4/5 Total	0.93	0.00	3.04	67.70	4.97	3.31	79.94
Braintree District Total	176.13	30.85	124.48	86.91	5.73	20.24	444.33
Bishops Stortford	0.00	6.56	0.00	0.00	0.00	n/a	6.56
Chelmsford	4.82	15.26	9.47	0.13	0.00	n/a	29.67
Colchester	1.30	0.00	12.14	14.06	0.00	n/a	27.50
Dunmow - Tesco Superstore	0.00	61.86	0.00	0.00	0.00	n/a	61.86
Sudbury	2.41	10.50	0.00	22.18	28.03	n/a	63.12
Haverhill	0.00	1.48	0.00	2.06	103.06	n/a	106.60
Maldon	0.74	0.16	5.00	0.00	0.00	n/a	5.91
Tiptree	0.00	0.00	25.36	1.03	0.00	n/a	26.39
Great Dunmow	0.00	16.24	0.00	0.00	0.00	n/a	16.24
Other	0.00	21.17	2.14	2.58	13.86	n/a	39.75
Other Sub-Total	9.27	133.24	54.11	42.04	144.95	n/a	383.60
TOTAL	185.40	164.08	178.59	128.95	150.67	n/a	827.93

Source: Tables 3 and 4

Table 10 - Main food stores convenience goods sales floorspace and benchmark turnover

Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Braintree					
Sainsbury's, Tofts Walk, town centre	2,671	75%	2,003	£12,006	£24.05
Tesco, Market Place, town centre	2,815	80%	2,252	£14,051	£31.64
Iceland, Bank Street, town centre	990	95%	941	£7,576	£7.13
B&M Bargains, Raynes Road	1,682	30%	505	£3,645	£1.84
Other Braintree Town Centre	1,100	100%	1,100	£5,000	£5.50
Co-op, Bocking Churchstreet	176	95%	167	£11,226	£1.88
Co-op, Braintree Bypass	231	95%	219	£11,226	£2.46
Co-op, Brook Street, Great Bardfield	150	95%	143	£11,226	£1.60
Co-op, Challis Lane, Braintree	337	95%	320	£11,226	£3.59
Co-op, Cressing Road, Braintree	160	95%	152	£11,226	£1.71
Lidl, Rayne Road, Braintree	1,180	80%	944	£8,260	£7.80
Marks & Spencer Simply Food, Braintree Retail Park	859	95%	816	£11,960	£9.76
Morrisons Daily, Panfield Lane, Braintree	129	95%	123	£10,555	£1.29
Tesco Express, Coggeshall Road, Braintree	257	95%	244	£14,051	£3.43
Tesco, Marks Farm, Braintree	3,517	70%	2,462	£14,051	£34.59
Braintree Sub-Total	16,254		12,390		£138.27
Great Notley					
Co-op, Priory Lane, Great Notley	141	95%	134	£11,226	£1.50
Marks & Spencer Simply Food BP, Notley Cross	84	95%	80	£11,960	£0.95
Marks & Spencer Simply Food, Great Notley	626	95%	595	£11,960	£7.11
Tesco, Great Notley	2,674	80%	2,139	£14,051	£30.06
Great Notley Sub-Total	3,525		2,948		£39.63
Witham					
Tesco, Grove Centre	2,217	80%	1,774	£14,051	£24.92
Iceland, Newland Shopping Centre	323	95%	307	£7,576	£2.32
Morrisons Daily, Newland Street	129	95%	123	£10,555	£1.29
Other Witham Town Centre	400	100%	400	£5,000	£2.00
Aldi, Reid Road, Witham	987	80%	790	£11,425	£9.02
Asda, Highfields Road, Witham	979	80%	783	£10,519	£8.24
Asda Express, London Road	84	95%	80	£10,519	£0.84
Co-op, Spa Road, Witham	239	95%	227	£11,226	£2.55
Lidl, Bridge Street, Witham	1,449	80%	1,159	£8,260	£9.57
Morrisons Daily, Laurence Avenue, Witham	129	95%	123	£10,555	£1.29
Morrisons, Braintree Road, Witham	3,057	85%	2,598	£10,555	£27.43
Witham	9,993		8,363		£89.48
Halstead					
Sainsbury's, High Street	999	85%	849	£12,006	£10.19
Tesco Superstore, Weavers Court	2,648	80%	2,115	£14,051	£29.72
Other Halstead Town Centre	600	100%	600	£5,000	£3.00
Lidl, Kings Road, Halstead	1,296	80%	1,037	£8,260	£8.56
Co-op, Colchester Road, Halstead	231	95%	219	£11,226	£2.46
Co-op, Abels Road, Halstead	117	95%	111	£11,226	£1.25
Halstead Sub-Total	5,891		4,932		£55.19
Other					
Co-op, High Street, Kelvedon	297	95%	282	£11,226	£3.17
Co-op, Broadway, Silver End	912	90%	821	£11,226	£9.21
Co-op, The Street, Hatfield Peverel	293	95%	278	£11,226	£3.12
Co-op, Swan Street, Sible Hedingham	373	95%	354	£11,226	£3.98
Co-op, High Street, Earls Colne	341	95%	324	£11,226	£3.64
Co-op, East Street, Coggeshall	505	95%	480	£11,226	£5.39
Morrisons Daily, Church Street, Coggeshall	129	95%	123	£10,555	£1.29
Other Halstead/Zone 4 Sub-Total	2,850		2,662		£29.80
Braintree District Total	38,513		31,294		£352.37

Source: ORC Storepoint 2026, VOA and GlobalData estimated company average sales densities for 2026

Table 11 - Summary of convenience goods expenditure 2026 to 2043 (£m)

	2026	2028	2033	2038	2043
Available expenditure					
Braintree	166.71	167.10	169.16	171.06	173.33
Great Notley	50.42	50.58	51.31	52.00	52.78
Witham	117.18	117.49	119.02	120.04	121.21
Halstead	59.72	59.71	59.91	59.96	60.26
Other Braintree District	35.67	35.74	36.11	36.38	36.74
Total	429.70	430.62	435.50	439.45	444.33
Turnover of existing facilities					
Braintree	138.27	138.27	138.13	137.44	136.76
Great Notley	39.63	39.63	39.59	39.39	39.19
Witham	89.48	89.48	89.39	88.94	88.50
Halstead	55.19	55.19	55.13	54.86	54.58
Other Braintree District	29.80	29.80	29.77	29.62	29.48
Total	352.37	352.37	352.01	350.26	348.51
Surplus/deficit expenditure					
Braintree	28.44	28.83	31.02	33.62	36.57
Great Notley	10.79	10.95	11.72	12.61	13.59
Witham	27.70	28.01	29.63	31.09	32.71
Halstead	4.53	4.53	4.78	5.11	5.68
Other Braintree District	5.87	5.94	6.34	6.76	7.27
Total	77.33	78.25	83.49	89.19	95.81

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Convenience goods floorspace capacity up to 2041 (cumulative)

	2026	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)*	£11,330	£11,330	£11,319	£11,262	£11,206
Floorspace projection (sq m net)					
Braintree	2,510	2,540	2,740	2,990	3,260
Great Notley	950	970	1,040	1,120	1,210
Witham	2,440	2,470	2,620	2,760	2,920
Halstead	400	400	420	450	510
Other Braintree District	520	520	560	600	650
Total	6,820	6,900	7,380	7,920	8,550
Floorspace projection (sq m gross)					
Braintree	3,590	3,630	3,910	4,270	4,660
Great Notley	1,360	1,390	1,490	1,600	1,730
Witham	3,490	3,530	3,740	3,940	4,170
Halstead	570	570	600	640	730
Other Braintree District	740	740	800	860	930
Total	9,750	9,860	10,540	11,310	12,220

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Figures may not sum due to rounding

* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

Table 13 - Summary of convenience goods expenditure 2026 to 2043 (£m) - excluding overtrade

	2026	2028	2033	2038	2043
Available expenditure					
Braintree	166.71	167.10	169.16	171.06	173.33
Great Notley	50.42	50.58	51.31	52.00	52.78
Witham	117.18	117.49	119.02	120.04	121.21
Halstead	59.72	59.71	59.91	59.96	60.26
Other Braintree District	35.67	35.74	36.11	36.38	36.74
Total	429.70	430.62	435.50	439.45	444.33
Turnover of existing facilities					
Braintree	166.71	166.71	166.54	165.71	164.88
Great Notley	50.42	50.42	50.37	50.12	49.87
Witham	117.18	117.18	117.06	116.48	115.90
Halstead	59.72	59.72	59.66	59.36	59.07
Other Braintree District	35.67	35.67	35.63	35.46	35.28
Total	429.70	429.70	429.27	427.13	425.00
Surplus/deficit expenditure					
Braintree	-	0.39	2.61	5.35	8.45
Great Notley	-	0.16	0.94	1.88	2.92
Witham	-	0.31	1.95	3.56	5.31
Halstead	-	-0.01	0.25	0.60	1.19
Other Braintree District	-	0.07	0.48	0.93	1.47
Total	-	0.92	6.23	12.32	19.33

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 14 - Convenience goods floorspace capacity up to 2041 (cumulative) - excluding overtrade

	2026	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)*	£11,330	£11,330	£11,319	£11,262	£11,206
Floorspace projection (sq m net)					
Braintree	0	30	230	480	750
Great Notley	0	10	80	170	260
Witham	0	30	170	320	470
Halstead	0	0	20	50	110
Other Braintree District	0	10	40	80	130
Total	0	80	540	1,100	1,720
Floorspace projection (sq m gross)					
Braintree	0	40	330	690	1,070
Great Notley	0	10	110	240	370
Witham	0	40	240	460	670
Halstead	0	0	30	70	160
Other Braintree District	0	10	60	110	190
Total	0	100	770	1,570	2,460

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Figures may not sum due to rounding

* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

Appendix 3 Comparison goods capacity

Table 1 - Study area population projections

Zone	2026	2028	2033	2038	2043
1 - Braintree	65,015	65,820	67,856	69,888	71,814
2 - Rural West	52,004	52,943	55,331	57,453	59,408
3 - Witham	61,584	62,376	64,360	66,038	67,550
4 - Halstead	44,081	44,525	45,494	46,325	47,165
5 - Rural North	52,426	52,946	54,280	55,573	56,859
Total	275,110	278,610	287,321	295,277	302,796

Sources: Experian Population Projections (2026)

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2026	2028	2033	2038	2043
1 - Braintree	3,057	3,141	3,482	3,864	4,317
2 - Rural West	3,425	3,520	3,901	4,329	4,837
3 - Witham	3,142	3,229	3,579	3,972	4,438
4 - Halstead	3,263	3,354	3,717	4,125	4,609
5 - Rural North	3,084	3,170	3,513	3,899	4,356

Sources:
Experian Local Expenditure 2024 (published 2026, 2024 prices) and Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total comparison goods expenditure (£m)

Zone	2026	2028	2033	2038	2043
1 - Braintree	198.73	206.77	236.25	270.05	310.04
2 - Rural West	178.10	186.34	215.84	248.73	287.37
3 - Witham	193.52	201.44	230.36	262.32	299.81
4 - Halstead	143.85	149.33	169.10	191.11	217.40
5 - Rural North	161.69	167.82	190.68	216.66	247.69
Total	875.89	911.70	1,042.23	1,188.87	1,362.31

Source: Tables 1 and 2

Table 4 - Base year comparison goods market shares by zone (%)

	1	2	3	4	5	Inflow
	Braintree	Rural West	Witham	Halstead	Rurla North	
Braintree - Zone 1 and 2						
Braintree Town Centre	30.3%	5.7%	4.8%	6.5%	0.1%	10.0%
Braintree Village Shopping Centre	7.8%	4.2%	4.2%	2.1%	2.2%	30.0%
Braintree Retail Park	8.6%	4.9%	2.7%	2.7%	0.1%	5.0%
Great Notley District Centre	2.7%	0.6%	0.0%	0.0%	0.0%	2.0%
Other Braintree	5.4%	1.5%	0.9%	3.9%	0.5%	2.0%
Zone 1/2 other in Braintree District	0.0%	0.2%	0.0%	0.0%	0.0%	2.0%
Braintree/Zone 1 and 2 Total	54.8%	17.1%	12.6%	15.2%	2.9%	
Witham - Zone 3						
Witham Town Centre	0.9%	0.1%	13.3%	0.0%	0.0%	5.0%
Other Witham	0.6%	0.0%	3.0%	0.0%	0.0%	2.0%
Zone 3 other in Braintree District	0.0%	0.0%	0.7%	0.1%	0.0%	2.0%
Witham/Zone 3 Total	1.5%	0.1%	17.0%	0.1%	0.0%	
Halstead - Zone 4 and 5						
Halstead Town Centre	0.5%	0.3%	0.5%	15.8%	0.5%	2.0%
Other Halstead	0.2%	0.0%	0.0%	0.4%	0.0%	2.0%
Coggeshall	0.0%	0.0%	0.0%	1.1%	0.0%	2.0%
Zone 4/5 other in Braintree District	0.1%	0.0%	0.0%	1.9%	0.2%	2.0%
Halstead/Zone 4 Total	0.8%	0.3%	0.5%	19.2%	0.7%	
Braintree District Total	57.1%	17.5%	30.1%	34.5%	3.6%	
Bishops Stortford	0.0%	6.7%	0.0%	0.0%	0.0%	n/a
Bury St Edmunds	0.4%	1.7%	0.1%	1.3%	17.3%	n/a
Cambridge	0.0%	7.4%	0.0%	0.4%	17.1%	n/a
Chelmsford	25.7%	27.2%	35.6%	3.2%	0.1%	n/a
Colchester	9.3%	1.4%	22.2%	42.8%	3.5%	n/a
Harlow	0.5%	7.6%	0.0%	0.0%	0.0%	n/a
Haverhill	1.2%	1.8%	0.0%	0.9%	39.9%	n/a
Lakeside, Thurrock	0.8%	2.8%	2.0%	0.2%	0.0%	n/a
Maldon	0.0%	0.0%	3.3%	0.2%	0.0%	n/a
Sudbury	0.2%	0.1%	0.0%	12.8%	13.8%	n/a
Other	4.8%	25.8%	6.7%	3.7%	4.7%	n/a
Other Sub-Total	42.9%	82.5%	69.9%	65.5%	96.4%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2026 comparison goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2026	198.73	178.10	193.52	143.85	161.69		875.89
Braintree - Zone 1 and 2							
Braintree Town Centre	60.21	10.15	9.29	9.35	0.16	9.91	99.07
Braintree Village Shopping Centre	15.50	7.48	8.13	3.02	3.56	16.15	53.84
Braintree Retail Park	17.09	8.73	5.22	3.88	0.16	1.85	36.93
Great Notley District Centre	5.37	1.07	0.00	0.00	0.00	0.13	6.57
Other Braintree	10.73	2.67	1.74	5.61	0.81	0.44	22.00
Zone 1/2 other in Braintree District	0.00	0.36	0.00	0.00	0.00	0.01	0.36
Braintree/Zone 1 and 2 Total	108.90	30.45	24.38	21.87	4.69	28.48	218.78
Witham - Zone 3							
Witham Town Centre	1.79	0.18	25.74	0.00	0.00	1.46	29.16
Other Witham	1.19	0.00	5.81	0.00	0.00	0.14	7.14
Zone 3 other in Braintree District	0.00	0.00	1.35	0.14	0.00	0.03	1.53
Witham/Zone 3 Total	2.98	0.18	32.90	0.14	0.00	1.63	37.83
Halstead - Zone 4 and 5							
Halstead Town Centre	0.99	0.53	0.97	22.73	0.81	0.53	26.56
Other Halstead	0.40	0.00	0.00	0.58	0.00	0.02	0.99
Coggeshall	0.00	0.00	0.00	1.58	0.00	0.03	1.61
Zone 4/5 other in Braintree District	0.20	0.00	0.00	2.73	0.32	0.07	3.32
Halstead/Zone 4 Total	1.59	0.53	0.97	27.62	1.13	0.65	32.49
Braintree District Total	113.47	31.17	58.25	49.63	5.82	30.77	289.11
Bishops Stortford	0.00	11.93	0.00	0.00	0.00	n/a	11.93
Bury St Edmunds	0.79	3.03	0.19	1.87	27.97	n/a	33.86
Cambridge	0.00	13.18	0.00	0.58	27.65	n/a	41.40
Chelmsford	51.07	48.44	68.89	4.60	0.16	n/a	173.17
Colchester	18.48	2.49	42.96	61.57	5.66	n/a	131.16
Harlow	0.99	13.54	0.00	0.00	0.00	n/a	14.53
Haverhill	2.38	3.21	0.00	1.29	64.51	n/a	71.40
Lakeside, Thurrock	1.59	4.99	3.87	0.29	0.00	n/a	10.73
Maldon	0.00	0.00	6.39	0.29	0.00	n/a	6.67
Sudbury	0.40	0.18	0.00	18.41	22.31	n/a	41.30
Other	9.54	45.95	12.97	5.32	7.60	n/a	81.38
Other Sub-Total	85.25	146.93	135.27	94.22	155.87	n/a	617.55
TOTAL	198.73	178.10	193.52	143.85	161.69	30.77	906.65

Source: Tables 3 and 4

Table 6 - Future 2028 comparison goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2028	206.77	186.34	201.44	149.33	167.82		911.70
Braintree - Zone 1 and 2							
Braintree Town Centre	62.65	10.62	9.67	9.71	0.17	10.31	103.13
Braintree Village Shopping Centre	16.13	7.83	8.46	3.14	3.69	16.82	56.06
Braintree Retail Park	17.78	9.13	5.44	4.03	0.17	1.92	38.48
Great Notley District Centre	5.58	1.12	0.00	0.00	0.00	0.14	6.84
Other Braintree	11.17	2.80	1.81	5.82	0.84	0.46	22.89
Zone 1/2 other in Braintree District	0.00	0.37	0.00	0.00	0.00	0.01	0.38
Braintree/Zone 1 and 2 Total	113.31	31.86	25.38	22.70	4.87	29.66	227.78
Witham - Zone 3							
Witham Town Centre	1.86	0.19	26.79	0.00	0.00	1.52	30.36
Other Witham	1.24	0.00	6.04	0.00	0.00	0.15	7.43
Zone 3 other in Braintree District	0.00	0.00	1.41	0.15	0.00	0.03	1.59
Witham/Zone 3 Total	3.10	0.19	34.25	0.15	0.00	1.70	39.38
Halstead - Zone 4 and 5							
Halstead Town Centre	1.03	0.56	1.01	23.59	0.84	0.55	27.59
Other Halstead	0.41	0.00	0.00	0.60	0.00	0.02	1.03
Coggeshall	0.00	0.00	0.00	1.64	0.00	0.03	1.68
Zone 4/5 other in Braintree District	0.21	0.00	0.00	2.84	0.34	0.07	3.45
Halstead/Zone 4 Total	1.65	0.56	1.01	28.67	1.17	0.67	33.74
Braintree District Total	118.06	32.61	60.63	51.52	6.04	32.03	300.90
Bishops Stortford	0.00	12.48	0.00	0.00	0.00	n/a	12.48
Bury St Edmunds	0.83	3.17	0.20	1.94	29.03	n/a	35.17
Cambridge	0.00	13.79	0.00	0.60	28.70	n/a	43.08
Chelmsford	53.14	50.68	71.71	4.78	0.17	n/a	180.48
Colchester	19.23	2.61	44.72	63.91	5.87	n/a	136.35
Harlow	1.03	14.16	0.00	0.00	0.00	n/a	15.20
Haverhill	2.48	3.35	0.00	1.34	66.96	n/a	74.14
Lakeside, Thurrock	1.65	5.22	4.03	0.30	0.00	n/a	11.20
Maldon	0.00	0.00	6.65	0.30	0.00	n/a	6.95
Sudbury	0.41	0.19	0.00	19.11	23.16	n/a	42.87
Other	9.92	48.08	13.50	5.53	7.89	n/a	84.91
Other Sub-Total	88.70	153.73	140.81	97.81	161.78	n/a	642.83
TOTAL	206.77	186.34	201.44	149.33	167.82	32.03	943.73

Source: Tables 3 and 4

Table 7 - Future 2033 comparison goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2033	236.25	215.84	230.36	169.10	190.68		1,042.23
Braintree - Zone 1 and 2							
Braintree Town Centre	71.58	12.30	11.06	10.99	0.19	11.79	117.92
Braintree Village Shopping Centre	18.43	9.07	9.68	3.55	4.19	19.25	64.16
Braintree Retail Park	20.32	10.58	6.22	4.57	0.19	2.20	44.07
Great Notley District Centre	6.38	1.30	0.00	0.00	0.00	0.16	7.83
Other Braintree	12.76	3.24	2.07	6.60	0.95	0.52	26.14
Zone 1/2 other in Braintree District	0.00	0.43	0.00	0.00	0.00	0.01	0.44
Braintree/Zone 1 and 2 Total	129.46	36.91	29.03	25.70	5.53	33.93	260.56
Witham - Zone 3							
Witham Town Centre	2.13	0.22	30.64	0.00	0.00	1.74	34.72
Other Witham	1.42	0.00	6.91	0.00	0.00	0.17	8.50
Zone 3 other in Braintree District	0.00	0.00	1.61	0.17	0.00	0.04	1.82
Witham/Zone 3 Total	3.54	0.22	39.16	0.17	0.00	1.94	45.03
Halstead - Zone 4 and 5							
Halstead Town Centre	1.18	0.65	1.15	26.72	0.95	0.63	31.28
Other Halstead	0.47	0.00	0.00	0.68	0.00	0.02	1.17
Coggeshall	0.00	0.00	0.00	1.86	0.00	0.04	1.90
Zone 4/5 other in Braintree District	0.24	0.00	0.00	3.21	0.38	0.08	3.91
Halstead/Zone 4 Total	1.89	0.65	1.15	32.47	1.33	0.77	38.26
Braintree District Total	134.90	37.77	69.34	58.34	6.86	36.64	343.85
Bishops Stortford	0.00	14.46	0.00	0.00	0.00	n/a	14.46
Bury St Edmunds	0.94	3.67	0.23	2.20	32.99	n/a	40.03
Cambridge	0.00	15.97	0.00	0.68	32.61	n/a	49.25
Chelmsford	60.72	58.71	82.01	5.41	0.19	n/a	207.03
Colchester	21.97	3.02	51.14	72.38	6.67	n/a	155.18
Harlow	1.18	16.40	0.00	0.00	0.00	n/a	17.58
Haverhill	2.83	3.89	0.00	1.52	76.08	n/a	84.32
Lakeside, Thurrock	1.89	6.04	4.61	0.34	0.00	n/a	12.88
Maldon	0.00	0.00	7.60	0.34	0.00	n/a	7.94
Sudbury	0.47	0.22	0.00	21.65	26.31	n/a	48.65
Other	11.34	55.69	15.43	6.26	8.96	n/a	97.68
Other Sub-Total	101.35	178.06	161.02	110.76	183.82	n/a	735.01
TOTAL	236.25	215.84	230.36	169.10	190.68	36.64	1,078.87

Source: Tables 3 and 4

Table 8 - Future 2038 comparison goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2038	270.05	248.73	262.32	191.11	216.66		1,188.87
Braintree - Zone 1 and 2							
Braintree Town Centre	81.82	14.18	12.59	12.42	0.22	13.47	134.70
Braintree Village Shopping Centre	21.06	10.45	11.02	4.01	4.77	21.99	73.30
Braintree Retail Park	23.22	12.19	7.08	5.16	0.22	2.52	50.39
Great Notley District Centre	7.29	1.49	0.00	0.00	0.00	0.18	8.96
Other Braintree	14.58	3.73	2.36	7.45	1.08	0.60	29.81
Zone 1/2 other in Braintree District	0.00	0.50	0.00	0.00	0.00	0.01	0.51
Braintree/Zone 1 and 2 Total	147.98	42.53	33.05	29.05	6.28	38.76	297.67
Witham - Zone 3							
Witham Town Centre	2.43	0.25	34.89	0.00	0.00	1.98	39.55
Other Witham	1.62	0.00	7.87	0.00	0.00	0.19	9.68
Zone 3 other in Braintree District	0.00	0.00	1.84	0.19	0.00	0.04	2.07
Witham/Zone 3 Total	4.05	0.25	44.59	0.19	0.00	2.21	51.30
Halstead - Zone 4 and 5							
Halstead Town Centre	1.35	0.75	1.31	30.19	1.08	0.71	35.39
Other Halstead	0.54	0.00	0.00	0.76	0.00	0.03	1.33
Coggeshall	0.00	0.00	0.00	2.10	0.00	0.04	2.15
Zone 4/5 other in Braintree District	0.27	0.00	0.00	3.63	0.43	0.09	4.42
Halstead/Zone 4 Total	2.16	0.75	1.31	36.69	1.52	0.87	43.29
Braintree District Total	154.20	43.53	78.96	65.93	7.80	41.84	392.26
Bishops Stortford	0.00	16.66	0.00	0.00	0.00	n/a	16.66
Bury St Edmunds	1.08	4.23	0.26	2.48	37.48	n/a	45.54
Cambridge	0.00	18.41	0.00	0.76	37.05	n/a	56.22
Chelmsford	69.40	67.65	93.39	6.12	0.22	n/a	236.77
Colchester	25.11	3.48	58.24	81.79	7.58	n/a	176.21
Harlow	1.35	18.90	0.00	0.00	0.00	n/a	20.25
Haverhill	3.24	4.48	0.00	1.72	86.45	n/a	95.89
Lakeside, Thurrock	2.16	6.96	5.25	0.38	0.00	n/a	14.75
Maldon	0.00	0.00	8.66	0.38	0.00	n/a	9.04
Sudbury	0.54	0.25	0.00	24.46	29.90	n/a	55.15
Other	12.96	64.17	17.58	7.07	10.18	n/a	111.96
Other Sub-Total	115.85	205.20	183.36	125.17	208.86	n/a	838.45
TOTAL	270.05	248.73	262.32	191.11	216.66	41.84	1,230.71

Source: Tables 3 and 4

Table 9 - Future 2043 comparison goods expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2043	310.04	287.37	299.81	217.40	247.69		1,362.31
Braintree - Zone 1 and 2							
Braintree Town Centre	93.94	16.38	14.39	14.13	0.25	15.45	154.55
Braintree Village Shopping Centre	24.18	12.07	12.59	4.57	5.45	25.23	84.09
Braintree Retail Park	26.66	14.08	8.09	5.87	0.25	2.89	57.85
Great Notley District Centre	8.37	1.72	0.00	0.00	0.00	0.21	10.30
Other Braintree	16.74	4.31	2.70	8.48	1.24	0.68	34.15
Zone 1/2 other in Braintree District	0.00	0.57	0.00	0.00	0.00	0.01	0.59
Braintree/Zone 1 and 2 Total	169.90	49.14	37.78	33.04	7.18	44.47	341.52
Witham - Zone 3							
Witham Town Centre	2.79	0.29	39.88	0.00	0.00	2.26	45.21
Other Witham	1.86	0.00	8.99	0.00	0.00	0.22	11.08
Zone 3 other in Braintree District	0.00	0.00	2.10	0.22	0.00	0.05	2.36
Witham/Zone 3 Total	4.65	0.29	50.97	0.22	0.00	2.53	58.65
Halstead - Zone 4 and 5							
Halstead Town Centre	1.55	0.86	1.50	34.35	1.24	0.81	40.31
Other Halstead	0.62	0.00	0.00	0.87	0.00	0.03	1.52
Coggeshall	0.00	0.00	0.00	2.39	0.00	0.05	2.44
Zone 4/5 other in Braintree District	0.31	0.00	0.00	4.13	0.50	0.10	5.04
Halstead/Zone 4 Total	2.48	0.86	1.50	41.74	1.73	0.99	49.30
Braintree District Total	177.04	50.29	90.24	75.00	8.92	47.99	449.48
Bishops Stortford	0.00	19.25	0.00	0.00	0.00	n/a	19.25
Bury St Edmunds	1.24	4.89	0.30	2.83	42.85	n/a	52.10
Cambridge	0.00	21.27	0.00	0.87	42.35	n/a	64.49
Chelmsford	79.68	78.16	106.73	6.96	0.25	n/a	271.78
Colchester	28.83	4.02	66.56	93.05	8.67	n/a	201.13
Harlow	1.55	21.84	0.00	0.00	0.00	n/a	23.39
Haverhill	3.72	5.17	0.00	1.96	98.83	n/a	109.68
Lakeside, Thurrock	2.48	8.05	6.00	0.43	0.00	n/a	16.96
Maldon	0.00	0.00	9.89	0.43	0.00	n/a	10.33
Sudbury	0.62	0.29	0.00	27.83	34.18	n/a	62.92
Other	14.88	74.14	20.09	8.04	11.64	n/a	128.80
Other Sub-Total	133.01	237.08	209.57	142.40	238.77	n/a	960.82
TOTAL	310.04	287.37	299.81	217.40	247.69	47.99	1,410.30

Source: Tables 3 and 4

Table 10 - Braintree District's comparison goods units and floorspace in main destinations

	Number of units	Sales floorspace sq.m (net)
Braintree town centre	61	9,359
Braintree food stores (non-food sales floorspace)	n/a	3,864
Great Notley food store (non-food sales floorspace)	n/a	577
Braintree Village Shopping Centre	66	14,000
Braintree Retail Park	10	10,000
Witham town centre	40	5,348
Witham food stores (non-food sales floorspace)	n/a	1,630
Halstead town centre	39	3,724
Halstead food stores (non-food sales floorspace)	n/a	755
Local centres	20	n/a
Braintree District Total	236	49,257

Source: Lichfields' survey July 2024 and VOA

Table 11 - Summary of comparison goods expenditure 2026 to 2043 (£m)

	2026	2028	2033	2038	2043
Available expenditure					
Braintree	158.01	164.50	188.13	214.90	246.55
Great Notley	6.57	6.84	7.83	8.96	10.30
Braintree Village Shopping Centre	53.84	56.06	64.16	73.30	84.09
Witham	36.30	37.79	43.21	49.23	56.29
Halstead	27.56	28.62	32.45	36.73	41.83
Other Braintree District	6.83	7.10	8.07	9.14	10.43
Total	289.11	300.90	343.85	392.26	449.48
Turnover of existing facilities					
Braintree	158.01	164.56	184.37	206.57	231.45
Great Notley	6.57	6.84	7.66	8.58	9.62
Braintree Village Shopping Centre	53.84	56.07	62.82	70.38	78.86
Witham	36.30	37.81	42.36	47.46	53.17
Halstead	27.56	28.70	32.15	36.03	40.36
Other Braintree District	6.83	7.11	7.97	8.93	10.00
Total	289.11	301.08	337.33	377.95	423.46
Surplus/deficit expenditure					
Braintree	-	-0.06	3.76	8.33	15.10
Great Notley	-	0.00	0.17	0.38	0.68
Braintree Village Shopping Centre	-	-0.01	1.34	2.91	5.23
Witham	-	-0.02	0.85	1.77	3.11
Halstead	-	-0.08	0.30	0.70	1.46
Other Braintree District	-	-0.02	0.10	0.22	0.42
Total	-	-0.18	6.52	14.30	26.01

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Comparison goods floorspace capacity up to 2043 (cumulative)

	2026	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)	£6,000	£6,248	£7,001	£7,844	£8,788
Floorspace projection (sq m net)					
Braintree	0	-10	540	1,060	1,720
Great Notley	0	0	20	50	80
Braintree Village Shopping Centre	0	0	190	370	590
Witham	0	0	120	230	350
Halstead	0	-10	40	90	170
Other Braintree District	0	0	10	30	50
Total	0	-20	920	1,830	2,960
Floorspace projection (sq m gross)					
Braintree	0	-10	770	1,510	2,460
Great Notley	0	0	30	70	110
Braintree Village Shopping Centre	0	0	270	530	840
Witham	0	0	170	330	500
Halstead	0	-10	60	130	240
Other Braintree District	0	0	10	40	70
Total	0	-20	1,310	2,610	4,220

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b
 Figures may not sum due to rounding

Appendix 4 Food and beverage capacity

Table 1 - Study area population projections

Zone	2026	2028	2033	2038	2043
1 - Braintree	65,015	65,820	67,856	69,888	71,814
2 - Rural West	52,004	52,943	55,331	57,453	59,408
3 - Witham	61,584	62,376	64,360	66,038	67,550
4 - Halstead	44,081	44,525	45,494	46,325	47,165
5 - Rural North	52,426	52,946	54,280	55,573	56,859
Total	275,110	278,610	287,321	295,277	302,796

Sources: Experian Population Projections (2026)

Table 2 - Food / beverage expenditure per person per annum (£)

Zone	2026	2028	2033	2038	2043
1 - Braintree	1,846	1,877	1,981	2,082	2,188
2 - Rural West	2,012	2,046	2,159	2,269	2,385
3 - Witham	1,829	1,860	1,963	2,063	2,168
4 - Halstead	1,847	1,879	1,982	2,083	2,190
5 - Rural North	1,704	1,733	1,828	1,922	2,020

Sources:

Experian Local Expenditure 2024 (published 2026, 2024 prices) and Retail Planner Briefing Note 23 - Leisure (March 2026)

Table 3 - Total food / beverage expenditure (£m)

Zone	2026	2028	2033	2038	2043
1 - Braintree	120.01	123.57	134.42	145.51	157.14
2 - Rural West	104.62	108.33	119.46	130.37	141.68
3 - Witham	112.65	116.05	126.34	136.25	146.48
4 - Halstead	81.43	83.65	90.19	96.52	103.28
5 - Rural North	89.32	91.74	99.24	106.79	114.83
Total	508.02	523.33	569.65	615.44	663.42

Source: Tables 1 and 2

Table 4 - Base year food and beverage market shares by zone (%)

	1	2	3	4	5	Inflow
	Braintree	Rural West	Witham	Halstead	Rural North	
Braintree/Zone 1/2						
Braintree Town Centre	38.2%	7.2%	5.8%	3.3%	0.7%	10.0%
Braintree Village Shopping Centre	4.6%	0.3%	0.5%	1.4%	0.0%	30.0%
Other Braintree	11.0%	7.5%	2.2%	6.7%	1.0%	5.0%
Great Notley	7.7%	0.0%	0.3%	0.1%	0.0%	2.0%
Other Zone 1/2 in Braintree District	14.3%	11.9%	1.0%	2.5%	4.2%	2.0%
Braintree/Zone 1/2 Total	75.8%	26.9%	9.8%	14.0%	5.9%	n/a
Witham/Zone 3						
Witham	0.5%	0.4%	34.0%	0.0%	0.0%	5.0%
Hatfield Peverel	0.0%	0.8%	5.6%	0.0%	0.0%	2.0%
Other Zone 3 in Braintree District	0.4%	0.0%	9.6%	1.4%	0.0%	2.0%
Witham/Zone 3 Total	0.9%	1.2%	49.2%	1.4%	0.0%	n/a
Halstead/Zone 4 and 5						
Halstead	2.2%	0.0%	0.0%	21.6%	0.0%	2.0%
Coggeshall	0.7%	0.0%	0.0%	4.9%	0.0%	2.0%
Other Zone 4/5 in Braintree District	2.1%	0.0%	0.0%	12.5%	14.8%	2.0%
Halstead/Zone 4 Total	5.0%	0.0%	0.0%	39.0%	14.8%	n/a
Braintree District Total	81.7%	28.1%	59.0%	54.4%	20.7%	
Bury St Edmunds	0.0%	0.0%	0.0%	0.0%	11.8%	n/a
Cambridge	0.0%	3.2%	0.0%	0.0%	6.0%	n/a
Chelmsford	3.7%	9.7%	10.8%	1.1%	0.0%	n/a
Colchester	0.3%	0.0%	3.5%	6.1%	0.3%	n/a
Great Dunmow	0.9%	22.6%	0.6%	0.0%	0.0%	n/a
Haverrhill	0.0%	0.9%	0.0%	2.5%	22.0%	n/a
London	1.0%	5.5%	1.0%	5.4%	3.4%	n/a
Sudbury	0.0%	0.0%	0.0%	1.8%	4.9%	n/a
Other	12.4%	30.0%	25.1%	28.7%	30.9%	n/a
Other Sub-Total	18.3%	71.9%	41.0%	45.6%	79.3%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2026 food / beverage expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2026	120.01	104.62	112.65	81.43	89.32		508.02
Braintree/Zone 1/2							
Braintree Town Centre	45.84	7.53	6.53	2.69	0.63	7.02	70.25
Braintree Village Shopping Centre	5.52	0.31	0.56	1.14	0.00	3.23	10.77
Other Braintree	13.20	7.85	2.48	5.46	0.89	1.57	31.45
Great Notley	9.24	0.00	0.34	0.08	0.00	0.20	9.86
Other Zone 1/2 in Braintree District	17.16	12.45	1.13	2.04	3.75	0.75	37.27
Braintree/Zone 1/2 Total	90.97	28.14	11.04	11.40	5.27	12.77	159.59
Witham/Zone 3							
Witham	0.60	0.42	38.30	0.00	0.00	2.07	41.39
Hatfield Peverel	0.00	0.84	6.31	0.00	0.00	0.15	7.29
Other Zone 3 in Braintree District	0.48	0.00	10.81	1.14	0.00	0.25	12.69
Witham/Zone 3 Total	1.08	1.26	55.42	1.14	0.00	2.47	61.37
Halstead/Zone 4 and 5							
Halstead	2.64	0.00	0.00	17.59	0.00	0.41	20.64
Coggeshall	0.84	0.00	0.00	3.99	0.00	0.10	4.93
Other Zone 4/5 in Braintree District	2.52	0.00	0.00	10.18	13.22	0.53	26.45
Halstead/Zone 4 Total	6.00	0.00	0.00	31.76	13.22	1.04	52.02
Braintree District Total	98.05	29.40	66.46	44.30	18.49	16.28	272.97
Bury St Edmunds	0.00	0.00	0.00	0.00	10.54	n/a	10.54
Cambridge	0.00	3.35	0.00	0.00	5.36	n/a	8.71
Chelmsford	4.44	10.15	12.17	0.90	0.00	n/a	27.65
Colchester	0.36	0.00	3.94	4.97	0.27	n/a	9.54
Great Dunmow	1.08	23.64	0.68	0.00	0.00	n/a	25.40
Haverrhill	0.00	0.94	0.00	2.04	19.65	n/a	22.63
London	1.20	5.75	1.13	4.40	3.04	n/a	15.51
Sudbury	0.00	0.00	0.00	1.47	4.38	n/a	5.84
Other	14.88	31.39	28.28	23.37	27.60	n/a	125.51
Other Sub-Total	21.96	75.22	46.19	37.13	70.83	n/a	251.33
TOTAL	120.01	104.62	112.65	81.43	89.32	n/a	524.30

Source : Table 3 and Table 4

Table 6 - Future 2028 food / beverage expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2028	123.57	108.33	116.05	83.65	91.74		523.33
Braintree/Zone 1/2							
Braintree Town Centre	47.20	7.80	6.73	2.76	0.64	7.24	72.37
Braintree Village Shopping Centre	5.68	0.32	0.58	1.17	0.00	3.33	11.09
Other Braintree	13.59	8.12	2.55	5.60	0.92	1.62	32.41
Great Notley	9.51	0.00	0.35	0.08	0.00	0.20	10.15
Other Zone 1/2 in Braintree District	17.67	12.89	1.16	2.09	3.85	0.77	38.43
Braintree/Zone 1/2 Total	93.66	29.14	11.37	11.71	5.41	13.16	164.46
Witham/Zone 3							
Witham	0.62	0.43	39.46	0.00	0.00	2.13	42.64
Hatfield Peverel	0.00	0.87	6.50	0.00	0.00	0.15	7.52
Other Zone 3 in Braintree District	0.49	0.00	11.14	1.17	0.00	0.26	13.07
Witham/Zone 3 Total	1.11	1.30	57.09	1.17	0.00	2.54	63.22
Halstead/Zone 4 and 5							
Halstead	2.72	0.00	0.00	18.07	0.00	0.42	21.21
Coggeshall	0.86	0.00	0.00	4.10	0.00	0.10	5.07
Other Zone 4/5 in Braintree District	2.59	0.00	0.00	10.46	13.58	0.54	27.17
Halstead/Zone 4 Total	6.18	0.00	0.00	32.62	13.58	1.07	53.45
Braintree District Total	100.96	30.44	68.47	45.50	18.99	16.77	281.13
Bury St Edmunds	0.00	0.00	0.00	0.00	10.83	n/a	10.83
Cambridge	0.00	3.47	0.00	0.00	5.50	n/a	8.97
Chelmsford	4.57	10.51	12.53	0.92	0.00	n/a	28.53
Colchester	0.37	0.00	4.06	5.10	0.28	n/a	9.81
Great Dunmow	1.11	24.48	0.70	0.00	0.00	n/a	26.29
Haverhill	0.00	0.97	0.00	2.09	20.18	n/a	23.25
London	1.24	5.96	1.16	4.52	3.12	n/a	15.99
Sudbury	0.00	0.00	0.00	1.51	4.50	n/a	6.00
Other	15.32	32.50	29.13	24.01	28.35	n/a	129.30
Other Sub-Total	22.61	77.89	47.58	38.14	72.75	n/a	258.98
TOTAL	123.57	108.33	116.05	83.65	91.74	n/a	540.10

Source : Table 3 and Table 4

Table 7 - Future 2033 food / beverage expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2033	134.42	119.46	126.34	90.19	99.24		569.65
Braintree/Zone 1/2							
Braintree Town Centre	51.35	8.60	7.33	2.98	0.69	7.88	78.83
Braintree Village Shopping Centre	6.18	0.36	0.63	1.26	0.00	3.62	12.05
Other Braintree	14.79	8.96	2.78	6.04	0.99	1.77	35.33
Great Notley	10.35	0.00	0.38	0.09	0.00	0.22	11.04
Other Zone 1/2 in Braintree District	19.22	14.22	1.26	2.25	4.17	0.84	41.96
Braintree/Zone 1/2 Total	101.89	32.14	12.38	12.63	5.86	14.33	179.21
Witham/Zone 3							
Witham	0.67	0.48	42.96	0.00	0.00	2.32	46.43
Hatfield Peverel	0.00	0.96	7.08	0.00	0.00	0.16	8.19
Other Zone 3 in Braintree District	0.54	0.00	12.13	1.26	0.00	0.28	14.21
Witham/Zone 3 Total	1.21	1.43	62.16	1.26	0.00	2.77	68.84
Halstead/Zone 4 and 5							
Halstead	2.96	0.00	0.00	19.48	0.00	0.46	22.90
Coggeshall	0.94	0.00	0.00	4.42	0.00	0.11	5.47
Other Zone 4/5 in Braintree District	2.82	0.00	0.00	11.27	14.69	0.59	29.37
Halstead/Zone 4 Total	6.72	0.00	0.00	35.17	14.69	1.15	57.74
Braintree District Total	109.82	33.57	74.54	49.06	20.54	18.25	305.79
Bury St Edmunds	0.00	0.00	0.00	0.00	11.71	n/a	11.71
Cambridge	0.00	3.82	0.00	0.00	5.95	n/a	9.78
Chelmsford	4.97	11.59	13.65	0.99	0.00	n/a	31.20
Colchester	0.40	0.00	4.42	5.50	0.30	n/a	10.62
Great Dunmow	1.21	27.00	0.76	0.00	0.00	n/a	28.97
Haverrhill	0.00	1.08	0.00	2.25	21.83	n/a	25.16
London	1.34	6.57	1.26	4.87	3.37	n/a	17.42
Sudbury	0.00	0.00	0.00	1.62	4.86	n/a	6.49
Other	16.67	35.84	31.71	25.88	30.67	n/a	140.77
Other Sub-Total	24.60	85.89	51.80	41.12	78.70	n/a	282.12
TOTAL	134.42	119.46	126.34	90.19	99.24	n/a	587.90

Source : Table 3 and Table 4

Table 8 - Future 2038 food / beverage expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2038	145.51	130.37	136.25	96.52	106.79		615.44
Braintree/Zone 1/2							
Braintree Town Centre	55.58	9.39	7.90	3.19	0.75	8.53	85.34
Braintree Village Shopping Centre	6.69	0.39	0.68	1.35	0.00	3.91	13.02
Other Braintree	16.01	9.78	3.00	6.47	1.07	1.91	38.23
Great Notley	11.20	0.00	0.41	0.10	0.00	0.24	11.95
Other Zone 1/2 in Braintree District	20.81	15.51	1.36	2.41	4.49	0.91	45.49
Braintree/Zone 1/2 Total	110.29	35.07	13.35	13.51	6.30	15.50	194.03
Witham/Zone 3							
Witham	0.73	0.52	46.33	0.00	0.00	2.50	50.08
Hatfield Peverel	0.00	1.04	7.63	0.00	0.00	0.18	8.85
Other Zone 3 in Braintree District	0.58	0.00	13.08	1.35	0.00	0.31	15.32
Witham/Zone 3 Total	1.31	1.56	67.04	1.35	0.00	2.99	74.25
Halstead/Zone 4 and 5							
Halstead	3.20	0.00	0.00	20.85	0.00	0.49	24.54
Coggeshall	1.02	0.00	0.00	4.73	0.00	0.12	5.87
Other Zone 4/5 in Braintree District	3.06	0.00	0.00	12.06	15.80	0.63	31.56
Halstead/Zone 4 Total	7.28	0.00	0.00	37.64	15.80	1.24	61.96
Braintree District Total	118.88	36.63	80.39	52.51	22.11	19.73	330.24
Bury St Edmunds	0.00	0.00	0.00	0.00	12.60	n/a	12.60
Cambridge	0.00	4.17	0.00	0.00	6.41	n/a	10.58
Chelmsford	5.38	12.65	14.72	1.06	0.00	n/a	33.81
Colchester	0.44	0.00	4.77	5.89	0.32	n/a	11.41
Great Dunmow	1.31	29.46	0.82	0.00	0.00	n/a	31.59
Haverhill	0.00	1.17	0.00	2.41	23.49	n/a	27.08
London	1.46	7.17	1.36	5.21	3.63	n/a	18.83
Sudbury	0.00	0.00	0.00	1.74	5.23	n/a	6.97
Other	18.04	39.11	34.20	27.70	33.00	n/a	152.05
Other Sub-Total	26.63	93.74	55.86	44.01	84.68	n/a	304.92
TOTAL	145.51	130.37	136.25	96.52	106.79	n/a	635.16

Source : Table 3 and Table 4

Table 9 - Future 2043 food / beverage expenditure patterns by zone (£m)

	1	2	3	4	5	Inflow	Total
	Braintree	Rural West	Witham	Halstead	Rural North		
Expenditure 2043	157.14	141.68	146.48	103.28	114.83		663.42
Braintree/Zone 1/2							
Braintree Town Centre	60.03	10.20	8.50	3.41	0.80	9.22	92.15
Braintree Village Shopping Centre	7.23	0.43	0.73	1.45	0.00	4.21	14.05
Other Braintree	17.29	10.63	3.22	6.92	1.15	2.06	41.27
Great Notley	12.10	0.00	0.44	0.10	0.00	0.26	12.90
Other Zone 1/2 in Braintree District	22.47	16.86	1.46	2.58	4.82	0.98	49.19
Braintree/Zone 1/2 Total	119.12	38.11	14.35	14.46	6.78	16.73	209.55
Witham/Zone 3							
Witham	0.79	0.57	49.80	0.00	0.00	2.69	53.85
Hatfield Peverel	0.00	1.13	8.20	0.00	0.00	0.19	9.53
Other Zone 3 in Braintree District	0.63	0.00	14.06	1.45	0.00	0.33	16.47
Witham/Zone 3 Total	1.41	1.70	72.07	1.45	0.00	3.21	79.84
Halstead/Zone 4 and 5							
Halstead	3.46	0.00	0.00	22.31	0.00	0.53	26.29
Coggeshall	1.10	0.00	0.00	5.06	0.00	0.13	6.29
Other Zone 4/5 in Braintree District	3.30	0.00	0.00	12.91	17.00	0.68	33.88
Halstead/Zone 4 Total	7.86	0.00	0.00	40.28	17.00	1.33	66.46
Braintree District Total	128.39	39.81	86.42	56.18	23.77	21.28	355.85
Bury St Edmunds	0.00	0.00	0.00	0.00	13.55	n/a	13.55
Cambridge	0.00	4.53	0.00	0.00	6.89	n/a	11.42
Chelmsford	5.81	13.74	15.82	1.14	0.00	n/a	36.51
Colchester	0.47	0.00	5.13	6.30	0.34	n/a	12.24
Great Dunmow	1.41	32.02	0.88	0.00	0.00	n/a	34.31
Haverrhill	0.00	1.28	0.00	2.58	25.26	n/a	29.12
London	1.57	7.79	1.46	5.58	3.90	n/a	20.31
Sudbury	0.00	0.00	0.00	1.86	5.63	n/a	7.49
Other	19.49	42.51	36.77	29.64	35.48	n/a	163.88
Other Sub-Total	28.76	101.87	60.06	47.10	91.06	n/a	328.84
TOTAL	157.14	141.68	146.48	103.28	114.83	n/a	684.70

Source : Table 3 and Table 4

Table 10 - Braintree District's food and beverage units and floorspace in main destinations

	Number of Outlets	Floorspace sq.m (gross)
Braintree town centre	52	7,830
Braintree Village Shopping Centre	7	2,000
Braintree Retail Park	7	2,706
Witham town centre	45	6,900
Halstead town centre	35	5,010
District and local centre	28	n/a
Braintree District Total	174	24,446

Source: Lichfields' survey July 2024 and VOA

Table 11 - Summary of food / beverage expenditure 2026 to 2043 (£m)

	2026	2028	2033	2038	2043
Available expenditure					
Braintree	101.69	104.79	114.16	123.57	133.42
Great Notley	9.86	10.15	11.04	11.95	12.90
Braintree Village Shopping Centre	10.77	11.09	12.05	13.02	14.05
Witham	41.39	42.64	46.43	50.08	53.85
Halstead	20.64	21.21	22.90	24.54	26.29
Other Braintree District	88.62	91.25	99.21	107.08	115.35
Total	272.97	281.13	305.79	330.24	355.85
Turnover of existing facilities					
Braintree	101.69	101.69	102.71	103.75	104.79
Great Notley	9.86	9.86	9.96	10.06	10.16
Braintree Village Shopping Centre	10.77	10.77	10.88	10.99	11.10
Witham	41.39	41.39	41.80	42.22	42.65
Halstead	20.64	20.64	20.85	21.06	21.27
Other Braintree District	88.62	88.62	89.51	90.41	91.32
Total	272.97	272.97	275.71	278.48	281.28
Surplus/deficit expenditure					
Braintree	-	3.09	11.44	19.82	28.63
Great Notley	-	0.29	1.08	1.89	2.74
Braintree Village Shopping Centre	-	0.32	1.18	2.04	2.95
Witham	-	1.25	4.62	7.85	11.20
Halstead	-	0.57	2.05	3.48	5.02
Other Braintree District	-	2.63	9.70	16.67	24.03
Total	-	8.15	30.07	51.76	74.58

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Leisure Figure 2

Table 12 - Food / beverage floorspace capacity up to 2043 (cumulative)

	2026	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)	£6,000	£6,000	£6,060	£6,121	£6,183
Floorspace projection (sq m gross)					
Braintree	0	520	1,890	3,240	4,630
Great Notley	0	50	180	310	440
Braintree Village Shopping Centre	0	50	190	330	480
Witham	0	210	760	1,280	1,810
Halstead	0	100	340	570	810
Other Braintree District	0	440	1,600	2,720	3,890
Total	0	1,370	4,960	8,450	12,060

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Leisure Figure 2

Figures may not sum due to rounding