Putting the Community First

BARNET LONDON BOROUGH

Colindale
Area Action Plan

Supporting Documents

Retail Provision Report
February 2008

Local Development Framework

Colindale – Retail Provision Note 06th Feb 08

Existing Retail Provision

There are currently 30 retail centres in Barnet which include three major town centres, ten district centres and seven local town centres as well as London's only regional shopping centre at Brent Cross. The smaller town centres, district and local centres, provide an important strategic / economic role in The Borough. Setting this diverse range of centres into context, the table below identifies the existing retail hierarchy, as detailed in the Barnet Unitary Development Plan (Revised Deposit 2001):-

Description	Location	
Regional shopping centre	Brent Cross	
Major town centres	Chipping Barnet North Finchley	Edgware
District town centres	Brent Street Church End Finchley East Finchley Temple Fortune Burnt Oak	Cricklewood Golders Green New Barnet Whetstone Mill Hill
Local town centres	Childs Hill East Barnet Hendon Central West Hendon	Colindale - The Hyde Friern Barnet Market Place
Local Neighbourhood Centre	Apex Corner Deansbrook Road Grahame Park Hampden Square New Southgate	Colney Hatch Lane Golders Green Road Hale Lane Holders Hill Circus Great North Road

Source : Barnet Unitary Development Plan – Revised Deposit 2001

The table below provides a summary of the overall existing quantum of floorspace for each of the centres in Barnet. The rows highlighted in bold are the town centres located within close proximity of the Colindale area. It is worth highlighting that Edgware, Burnt Oak, Mill Hill and the Hyde (details below) have significant development proposals within the development pipeline.

Town Centre Floor Space	Floor Space Sq M	Floor Space Sq Ft
Edgware	**54,830**	**590,185**
Cricklewood	54,688	588,657
North Finchley	45,484	489,586
Chipping Barnet	38,634	415,853
Burnt Oak	**36,240**	**390,084**

Temple Fortune	36,210	389,761
Church End	31,010	333,789
Golders Green	30,010	323,025
Mill Hill	**29,350**	**315,921**
East Finchley	22,930	246,816
Whetstone	20,640	222,167
Hendon Central	**20,410**	**219,691**
New Barnet	15,091	162,438
The Hyde	**10,858**	**116,874**
Colindale Existing	**2,352**	**25,317**

In terms of Colindale specifically, The Hyde (the A5) which is situated just outside the AAP area, has the largest concentration of retail provision and is classified as a local town centre. It currently provides a reasonable range of both convenience and comparison floor space; however, this will be significantly improved if the redevelopment proposals for Oriental City are implemented. This will help to further reinforce The Hyde's designation as a Town Centre for the area.

For ease of reference Development Securities recently completed the sale Oriental City to Private investor Peter Virdee through his company B&S. Dev Sec had secured planning consent for 300,000 sq ft of shops and 520 homes. However, we understand that B&S Property plans to increase the number of homes to between 600 and 700.

The existing retailing provision within Colindale is concentrated in the Grahame Park Estate. The existing Estate provides an important economic and social function for the community and comprises 2,352 sq m (25,317 sq ft) of retail floorspace. The centre provides a number of uses including a grocers, chemist, newsagents, telephone shop, baker, hairdresser, bookmakers, public house and a post office.

Future Provision

Further alterations to the London Plan (2006) have identified Colindale as an Opportunity Area with a capacity for 10,000 new homes and 500 new jobs.

There are a number of development schemes already underway and others which are likely to come formed in the short term. The largest proposal is the redevelopment of the Graham Park Estate. The redevelopment proposals include circa 2,807 sq m (30,214 sq ft) of replacement retail floorspace, 6,267 sq m (67,457 sq ft) of D1 (social and community) floorspace as well as 3,440 residential units. It should be noted that only a small increase of retail floor floorspace in comparison to the existing is proposed.

The second significant development, which is now largely complete, is the Beaufort Park development by St George. We understand that the scheme is planned to include 4,645 sq m (50,000 sq ft) of retail use. This includes a 1,393 sq m (15,000 sq ft) of convenience floor space. In addition to the retail use an additional 470 sq m (5,059 sq ft) of A3 floorspace is proposed as well and health and fitness and community uses. This is greater than the level of development planned for The Graham Park redevelopment and therefore could be seen as an additional Neighbourhood Centre to serve the new residents of Beaufort Park, as well as neighbouring residents and workers in area.

In addition to the above there are development proposal for the Colindale Hospital Site, The Brents Works / Colindale Library site, currently being advanced by Fairview and the Peel Centre site. The Colindale Hospital proposals are largely residential, however also include a hotel use and supporting retail and A3 uses. The Brent Works / Library site and Peel Centre sites are medium term opportunities however again are likely to be residential lead mixed use schemes.

Impact on Adjoining Centres

As mentioned above there is an established retail hierarchy in the area and careful consideration would need to be given to the impact on these centres from a social, economic and planning perspective if significant levels of additional retail floorspace were to be promoted within the Colindale area. It should also be noted any re-designation of the retail hierarchy is likely to have significant timescale implication for the delivery of the AAP and should therefore be considered carefully.

Such a consideration would be best undertaken with the benefit of a Borough wide retail capacity study, which takes into account of existing and emerging development proposals – both in terms of new retail development, and also proposals for new residential development. So far as we are aware, the extant retail studies for Barnet are the North West London Retail Study, April 2004 (GVA Grimley / RPS) and the Borough Wide Retail Study, February 2000 (CB Hillier Parker). Both studies are now somewhat out of date, and both studies are also predicated on significantly out of date household information data. So far as we are aware neither study made specific recommendations in terms of the Colindale area.

Initial Retail Capacity Calculation

In the absence of up to date retail capacity analysis, we have undertaken our own initial estimate of the level of convenience retail floorspace which could be supported by proposed new development in the Colindale area.

We would stress that this is only a rough calculation, based on the assumptions stated, and it will be essential to undertake a thorough and comprehensive retail study of the area, before finalising any formal consideration of the need for new retail floorspace, and its format. This should investigate whether there are currently, or will be in the future, deficiencies in retail provision in the surrounding area, which might be met by greater level of new retail development within the area, in conjunction with the new housing. In addition to the following quantative calculation, there may be specific qualitative considerations which need to be taken into consideration in due course.

Number of proposed dwellings			10,000			
Less existing dwellings demolished			1,777			
Net additional dwellings			8,223			
Average occupancy rate			2.25	ppd		
Net additional population					18,502	
National average per capita expenditure (convenience goods) in	2006	£	1,609			
Increase to completion in	2018		1	% pa		
National average per capita expenditure (convenience goods) in	2018			£	1,813.06	
Total new convenience goods expenditure generated in	2018			£	33.54	m
Assumed local retention rate					85	%
Available local convenience goods expenditure				£	28.51	m
Generic sales density of multiple national food store				£	12,000	per sq m net
SUPPORTABLE CONVENIENCE GOODS FLOORSPACE					**2,376**	**sq m net**
Sources: MapInfo Brief 07/02, DTZ estimates.						
Assumes that the residential development is completed by 2018.						
Comparison goods expenditure would be additional to the above estimates. Most comparison expenditure from within the study area would be attracted to existing and committed larger shopping centres. However, a small proportion would be potentially available to support limited convenience floorspace.						

The above shows that there should be sufficient expenditure generated by the new residents to support circa 2,400 sq m net convenience goods sales floorspace, which equates to approximately 5,000 sq m gross (including some comparison goods floorspace), by the time of completion.

When this is considered in the context of existing / committed floor space at Beaufort Park and the proposed floor space at Graeme Park, there maybe sufficient capacity for a further small convenience store supported by some limited comparison retail provision. The above would suggest that there maybe scope to include an additional neighbourhood centre comprising a similar quantum of retail floor space to that as proposed at Beaufort Park i.e. up to 4,645 sq m (50,000 sq ft) of retail including a small convenience offer of circa 1,393 sq m 15,000 sq ft gross. Clearly there needs to be a degree of flexibility within any design to reflect current market conditions in terms of the size and configuration of retail floor space when such development is brought forward.

Given the future proposals for the Hospital Site, which includes a new transport hub / interchange, the Brent Works / Library Site and the redevelopment aspirations for the Peel Centre, we would suggest that a third neighbourhood centre in the location may be appropriate. This would provide activity at a key arrival point to the area and also serve the next wave of proposed residential growth. It would further provide active frontages along Colindale Avenue which is currently an unattractive and uninspiring location.

In addition to the retail provision, although difficult to quantify at this stage, the retail / A3 provision could be supported by additional health and fitness and community floor space to further enhance the overall “offer”.

Conclusions / Summary

Barnet provides a wide range of retail accommodation ranging from Brent Cross, the major sub regional centre, through to town centre and local neighbourhood centres which provide more of a localised retail function. There are limited possibilities for significant retail expansion, especially in the context of the proposals for Oriental City, however opportunities exist to provide a good mix of local retailing to support the growing population.

We are of the opinion there is the opportunity to provide a further neighbourhood centre fronting Colindale Avenue in the vicinity Colindale Hospital, Brent Works and the Peel Centre area if linked to wider regeneration and residential developments. In isolation, such limited retail provision is unlikely to be a strong value generator, however such use would be justified on the basis of the importance of a adequate provision of local shopping facilities for new residents of the study area.

In addition to retail provision supporting community and leisure use such as A3/A4/A5 uses and health and leisure uses should be supportable, provided these are complementary to existing facilities.

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