

c p w planning

**Perth & Kinross  
City and Town Centre  
Retail Study:  
Partial Update 2026**

April 2026

prepared for

**Perth & Kinross Council**

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# 1. Introduction

- 1.1 CPW Planning was commissioned by Perth and Kinross Council ('PKC') to prepare a Partial Update to the 2023 Perth & Kinross City and Town Centre Retail Study (hereafter the '2023 Study').
- 1.2 The scope of this Partial Update is limited to an updated assessment of new retail (convenience and comparison goods) floorspace capacity in the Perth and Kinross area, with a base year of 2026 and projections to 2038 so as to cover the emerging plan period.
- 1.3 This assessment is based on the latest available data inputs and assumptions, although we have used the same catchment area and market share analysis from the household telephone survey that informed the 2023 Study. In reality, market shares are likely to have altered to some extent; however, we do not consider that new evidence is required at this stage but should form part of a more comprehensive update in the future.
- 1.4 It is also to be noted that Experian's latest expenditure growth rates (derived from the Retail Planner Briefing Note 23 and used for this Partial Update) do not account for the Iran war and the potential ramifications for the UK economy. Our updated assessment of retail floorspace capacity should be understood in that context.
- 1.5 The remainder of this report is structured as follows:
  - **Section 2** describes the basis of our updated retail capacity forecasts, including the data inputs we have used and the development scenarios assessed; and
  - **Section 3** sets out and describes the updated retail capacity forecasts for the Perth and Kinross area.

## 2. Basis of the Updated Retail Capacity Forecasts

2.1 For the retail capacity forecasting in this Partial Update, we have used the same Excel-based retail capacity model as the 2023 Study. The shopping destinations modelled are shown in Figure 2.1 below.

**Figure 2.1 – Shopping destinations modelled**

Perth City Centre	
Kinross Town Centre	
Auchterarder Town Centre	<i>Strathearn Area</i>
Crieff Town Centre	
Alyth Town Centre	<i>Strathmore and the Glens</i>
Blairgowrie Town Centre	
Coupar Angus Town Centre	
Dunkeld & Birnam Town Centre	<i>Highland Area</i>
Aberfeldy Town Centre	
Pitlochry Town Centre	
Non-central stores in the Perth and Kinross area (as a group)	

2.2 No retail capacity forecasts are prescriptive and the further ahead the forecasting year, the less certain the forecasts. Accordingly, PKC should be aware that capacity forecasts beyond five years should be treated with a degree of caution, as they are based on various assumptions and forecasts that can and will change. Forecasting accuracy, even over the next five years, is also uncertain due to changing macro-economic conditions and the potential ramifications of the Iran war.

2.3 The latest available data inputs and assumptions have been applied to the retail capacity model. It is to be noted, however, that this Partial Update is based on a household telephone survey of shopping patterns conducted by NEMS Market Research in August/September 2022. Notwithstanding, we are currently satisfied that the model and its resulting retail capacity forecasts are realistic for the purposes of plan preparation and informing decisions on planning applications.

2.4 Consistent with good retail planning practice, we forecast the expenditure-based capacity for new retail floorspace as follows:

- calculate the total amount of convenience and comparison goods expenditure available within each of the 5 zones comprising the catchment area, at the base and forecasting years (as defined below);
- allocate the available expenditure to the area's shopping destinations based on the results of the 2022 household telephone survey to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission and/or under construction) and assess their likely turnover contribution to future sales; and
- compare the estimated sales in the area's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional convenience and/or comparison goods floorspace (after allowing for any committed developments).

2.5 We describe below the principal data inputs, the development scenarios assessed, and the format of the retail capacity tables.

## **Principle data inputs**

### *Catchment area*

- 2.6 We have adopted the same catchment area (and zones) as the 2023 Study. The catchment area zones are based on postcode geography<sup>1</sup> and extend beyond the administrative boundary of PKC to reflect shopping patterns and expenditure flows.
- 2.7 A map of the catchment area showing the 5 zones is included at Appendix A.

### *Base and forecasting years*

- 2.8 As set out previously, we have used 2026 as the base year for our updated retail capacity forecasts. The model therefore provides estimates of current sales in each of the shopping destinations as at 2026.
- 2.9 As agreed with the Council, we have prepared capacity forecasts at 2028, 2033 and 2038 (so as to cover the emerging plan period).

### *Catchment population*

- 2.10 Population forecasts for updated base year and forecasting years are derived from the 2022 'GeoInsight' report commissioned from Precisely for the purposes of the 2023 Study. For the catchment area as a whole, the population is expected to increase from 208,129 in 2026 to 214,179 by 2038 (representing an increase of about 3%).

### *Price basis*

- 2.11 All monetary values in the retail capacity model have been updated to 2024 prices, unless otherwise stated. Price conversions from other price bases have been undertaken with regard to the Experian Retail Planner Briefing Note 22 (Appendix 4b).

### *Per capita expenditure*

- 2.12 The 2022 report commissioned from Precisely set out estimated average per capita expenditure on convenience and comparison goods<sup>2</sup> in each catchment area zone. We have utilised the expenditure estimates and forecasts included within that report for this Partial Update, converted to 2024 prices and applying expenditure growth rates derived from the Experian Retail Planner Briefing Note 23.
- 2.13 The average per capita expenditure figures for comparison and convenience goods, from zone to zone, are shown in the top half of Table 2 at Appendix B. These are specific to the catchment area and broadly reflect the UK-wide outlook, with small reductions in per capita expenditure on convenience goods; and sustained levels of modest comparison goods expenditure growth over the assessment period.

### *Special Forms of Trading (SFT)*

- 2.14 We have made updated deductions from the per capita expenditure figures previously supplied by Precisely to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.
- 2.15 We have applied an SFT deduction of 5.4% for convenience goods expenditure in 2026, increasing to 7.1% by 2038. Our SFT deductions for comparison goods expenditure are much greater; from 26.1% in 2026 to 30.4% by the end of the forecasting period.
- 2.16 These deductions are based on judgements at this moment in time (derived from the Experian Retail Planner Briefing Note 23). Whilst the total volume of online retail sales is greater than the percentages assumed within the model, it is necessary to recognise that, with the growth of multi-channel retailing, physical stores can function as showrooms and a source of stock for online-based sales. Therefore, not all online retail sales are 'lost' from the turnover of physical stores and our SFT deductions seek to account for this.

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<sup>1</sup> Refer to Table 1 at Appendix B for details of the relevant postcode sectors.

<sup>2</sup> Including expenditure on Special Forms of Trading.

### *Shopping patterns*

- 2.17 For this Partial Update, we have used the results of the 2022 household telephone survey. The survey covered the area shown on the map in Appendix A which was divided into the 5 catchment area zones shown on that map. A description of the survey and how the results have been applied to our retail capacity model is included in the 2023 Study. The results have been used in the same way in this Partial Update.

### *Visitor expenditure*

- 2.18 For some of the shopping destinations modelled, the 2023 Study made allowances for convenience and comparison goods expenditure by visitors who live outside the catchment area (or 'inflow' expenditure). The same allowances have been made in this Partial Update.
- 2.19 The visitor expenditure allowances are reflected in Table 13 at Appendix B for Perth City Centre, and in the equivalent tables for the other shopping destinations modelled.

### *Existing shop floorspace*

- 2.20 We have used the same existing shop floorspace data as the 2023 Study. The latest sales density estimates have been derived from GlobalData 2024.

### *Committed shop floorspace*

- 2.21 PKC officers provided details of committed and 'lost' shop floorspace in the Perth and Kinross area. We have included in the model any substantial (i.e. 500 sqm gross or more) retail development proposals with extant planning permission. Thus, the proposed new Sainsbury's supermarket (application ref. 24/01609/FLL) in Auchterarder has not been included on the basis it measures 448 sqm gross / 313 sqm net sales area. Meanwhile, we have not accounted for any shop floorspace lost as a result of changes of use (etc), as this is not of significance to strategic retail capacity forecasting.
- 2.22 The committed developments we have accounted for in the retail capacity model are:
- Proposed supermarket (application ref. 10/00666/FLM) on land off Bridge Road, Pitlochry measuring 1,393 sqm net sales area. Permission was granted in November 2010. PKC officers have advised the permission was lawfully implemented and the site is currently being prepared for development. The operator is understood to be Tesco.
  - Proposed additional retail (application ref. 23/01379/FLL) measuring up to 1,461 sqm net sales area on land adjacent to The House of Bruar; a specialist country clothing department store in Blair Atholl, Pitlochry. It is assumed the comparison goods floorspace would comprise clothing and soft furnishings.
- 2.23 For the development scenarios assessed in this Partial Update, we have further included the following 'non-central' foodstore proposals:
- Proposed new/replacement Aldi foodstore (application ref. 21/00248/FLL) on land west of 4 Pickembere, Perth. It is understood this new foodstore would replace Aldi's existing (smaller) Glasgow Road foodstore. Although permission has not been granted at this stage, we have been instructed by PKC officers to prepare capacity forecasts on the basis the replacement foodstore is delivered. The net additional convenience goods floorspace equates to 377 sqm net sales area. We have not accounted for the very small change in comparison goods floorspace.
  - Proposed new Lidl foodstore (application ref. 23/02025/FLL) on land north of Crieff Road, Perth measuring 1,331 sqm net sales area. Although permission has not been granted at this stage, we have been instructed by PKC officers to prepare capacity forecasts on the basis the foodstore is delivered. Our modelling assumes 1,065 sqm net convenience goods floorspace and 266 sqm net comparison goods floorspace.

### *Growth in sales density efficiencies*

- 2.24 We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary.
- 2.25 We have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period.

### **Scenarios modelled**

- 2.26 We have assessed the following scenarios for retail floorspace in the Perth and Kinross area:
- **Scenario 1** – the ‘baseline’ scenario, in which we assume the 2022 pattern of market shares of convenience and comparison goods expenditure in each of the area’s shopping destinations, indicated by the 2022 household telephone survey, remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace (or ‘lost’ retail floorspace e.g. through redevelopment and/or change of use to non-retail) would not change the market shares of expenditure attracted from the catchment area. This ‘constant market share’ approach is widely used and accepted for strategic retail capacity forecasting.
  - **Scenario 2** – in which it is assumed the ‘non-central’ Aldi and Lidl foodstores identified previously come forward by 2028.
  - **Scenario 3** – in which it is assumed the new/replacement Aldi foodstore (only) is delivered by 2028.
- 2.27 It is to be noted that no adjustments to the 2022 pattern of market shares have been applied under Scenarios 2 and 3. The additional foodstore(s) in these scenarios are treated as committed developments for the purposes of this Partial Update. In reality, the proposed new foodstore(s) will result in some market share changes (especially for convenience goods shopping) with potential ‘impact’ implications for existing centres and stores in the Perth and Kinross area.

### **Format of the retail capacity tables**

- 2.28 Our updated retail capacity tables are included in Appendix B and comprise the following:
- Tables 1 to 5 show the population and expenditure forecasts for the catchment area.
  - Tables 6 to 13 are the tables for Perth City Centre. Tables 6 and 7 indicate the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the 2022 household telephone survey. Table 8 provides an overview of the pattern of market shares for Perth City Centre. Table 9 is the product of Tables 5 and 7, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main foodstores and other convenience goods shops in the City Centre, and Table 12 sets out any committed retail developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Perth City Centre. It also shows (in the bottom row) the overall market shares of catchment area expenditure on convenience and comparison goods attracted by the City Centre.
  - Thereafter, we have modelled Kinross Town Centre (Tables 14 to 21); Auchterarder Town Centre (Tables 22 to 29); Crieff Town Centre (Tables 30 to 37); Alyth Town Centre (Tables 38 to 45); Blairgowrie Town Centre (Tables 46 to 53); Coupar Angus Town Centre (Tables 54 to 61); Dunkeld & Birnam Town Centre (Tables 62 to 69); Aberfeldy Town Centre (Tables 70 to 77); and Pitlochry Town Centre (Tables 78 to 85). These tables follow the same arrangement as the tables for Perth City Centre.
  - Tables 86 to 94 are the Scenario 1 tables for Non-central stores in the Perth and Kinross area. These tables follow the same arrangement as the tables for Perth City Centre; however, an

additional table is included (Table 92) indicating 'benchmark' comparison goods sales in the existing retail warehouses and foodstores.

- The Scenario 2 tables for Non-central stores in the Perth and Kinross area comprise Tables 95 to 103. Table 102 accounts for the sales capacity of the proposed new/replacement Aldi foodstore (Land west of 4 Pickembere, Perth) and the proposed new Lidl foodstore (Land north of Crieff Road, Perth).
- The Scenario 3 tables for Non-central stores in the Perth and Kinross area comprise Tables 104 to 112. Table 111 includes the sales capacity of the proposed new/replacement Aldi foodstore.

### **3. Updated Retail Capacity Forecasts**

- 3.1 In this section, we set out and discuss our updated retail capacity forecasts for the Perth and Kinross area.
- 3.2 We have prepared individual forecasts for both convenience and comparison goods floorspace in Perth City Centre, each of the nine town centres, and Non-central stores in the Perth and Kinross area (as a group) over the period to 2038. We also set out combined forecasts for the Perth and Kinross sub-areas and for the area as a whole.
- 3.3 Our updated forecasts are based on the unchanged 2022 pattern of market shares of convenience and comparison goods expenditure, allowing for committed developments (Scenario 1), before accounting for the potential delivery of new Aldi and/or Lidl foodstores under Scenarios 2 and 3 respectively.
- 3.4 It should once again be remembered that the capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change.

#### **Convenience Goods Floorspace**

- 3.5 The updated forecasts in respect of the need for new convenience goods floorspace in the Perth and Kinross area are summarised in Figure 3.1 below for Scenario 1; Figure 3.2 for Scenario 2; and Figure 3.3 for Scenario 3. We show the capacity for new floorspace (sqm net sales area), with the net available expenditure to support new floorspace shown in brackets/grey under the 'sqm net sales area' figures.
- 3.6 For clarity, given the proposed new Aldi and Lidl foodstores are situated in 'non-central' locations, Figures 3.2 and 3.3 show only the individual forecasts for Non-central stores in the Perth and Kinross area (as a group) and the combined forecasts for the area as a whole.
- 3.7 Before we comment on the updated capacity forecasts, we would note that the forecasts are on the assumption that, where existing convenience goods floorspace is shown in the model to be trading above or below average benchmark levels, the sales density will fall or rise to that benchmark level from 2028 onwards. In reality, some stores may continue to trade above or below average benchmark levels.
- 3.8 The forecasts are also on the assumption that potential new convenience goods floorspace would be delivered in the form of a new foodstore(s) trading at a 'generic' average sales density of £11,500 per sqm net unless, under the additional scenarios modelled, specific operators (e.g. Aldi and Lidl) have been identified at the planning stage – in which case their company 'benchmark' sales density estimates have been adopted.

**Figure 3.1 – Summary of capacity forecasts: convenience goods (sqm net sales area)**

<b>Scenario 1</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	Table number (Appendix B)
Perth City Centre	-2,200 (-£25.4m)	-2,200 (-£25.6m)	-2,250 (-£25.7m)	13
Kinross Town Centre	-250 (-£3.0m)	-250 (-£3.0m)	-250 (-£3.0m)	21
Auchterarder Town Centre	-50 (< £0m)	-50 (< £0m)	-50 (< £0m)	29
Crieff Town Centre	-1,200 (-£13.6m)	-1,200 (-£13.6m)	-1,150 (-£13.6m)	37
<b>Strathearn Area (sub-total)</b>	<b>-1,250</b>	<b>-1,250</b>	<b>-1,200</b>	
Alyth Town Centre	-350 (-£4.2m)	-350 (-£4.3m)	-350 (-£4.3m)	45
Blairstown Town Centre	-2,800 (-£32.3m)	-2,800 (-£32.5m)	-2,850 (-£32.6m)	53
Coupar Angus Town Centre	n/a (n/a)	n/a (n/a)	n/a (n/a)	61
<b>Strathmore and the Glens (sub-total)</b>	<b>-3,150</b>	<b>-3,150</b>	<b>-3,200</b>	
Dunkeld & Birnam Town Centre	-200 (-£2.1m)	-200 (-£2.1m)	-200 (-£2.1m)	69
Aberfeldy Town Centre	350 (£4.2m)	350 (£4.2m)	350 (£4.3m)	77
Pitlochry Town Centre	0 (< £0m)	0 (< £0m)	0 (< £0m)	85
<b>Highland Area (sub-total)</b>	<b>150</b>	<b>150</b>	<b>150</b>	
Non-central stores in Perth and Kinross	-2,350 (-£27.0m)	-2,550 (-£29.3m)	-2,700 (-£31.2m)	94
<b>Combined forecasts for Perth and Kinross</b>	<b>-9,050</b>	<b>-9,250</b>	<b>-9,450</b>	

Notes:

a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

b) Forecasts rounded to the nearest 50 sqm net.

c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

**Figure 3.2 – Summary of capacity forecasts: convenience goods (sqm net sales area)**

<b>Scenario 2</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	Table number (Appendix B)
Non-central stores in Perth and Kinross	-3,400 (-£39.3m)	-3,600 (-£41.6m)	-3,750 (-£43.4m)	103
<b>Combined forecasts for Perth and Kinross</b>	<b>-10,100</b>	<b>-10,300</b>	<b>-10,500</b>	

Notes:

a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

b) Forecasts rounded to the nearest 50 sqm net.

c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

d) The Scenario 2 forecasts for Perth City Centre and each of the nine town centres are the same as those shown in Figure 3.1 (Scenario 1).

**Figure 3.3 – Summary of capacity forecasts: convenience goods (sqm net sales area)**

<b>Scenario 3</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	Table number (Appendix B)
Non-central stores in Perth and Kinross	-2,650 (-£30.5m)	-2,850 (-£32.7m)	-3,000 (-£34.6m)	112
<b>Combined forecasts for Perth and Kinross</b>	<b>-9,350</b>	<b>-9,550</b>	<b>-9,750</b>	

Notes:

a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

b) Forecasts rounded to the nearest 50 sqm net.

c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

d) The Scenario 3 forecasts for Perth City Centre and each of the nine town centres are the same as those shown in Figure 3.1 (Scenario 1).

- 3.9 Scenarios 1, 2 and 3 each reveal a substantial theoretical over-supply of convenience goods floorspace in the Perth and Kinross area from 2028 onwards.
- 3.10 The most significant over-supply forecasts under Scenario 1 are focused on Blairgowrie Town Centre (about -2,800 sqm net sales area), Non-central stores in Perth and Kinross (about -2,350 sqm net sales area) and Perth City Centre (about -2,200 sqm net sales area) in 2028.
- 3.11 Scenario 2 explores the effect of including the proposed new ‘non-central’ Aldi and Lidl foodstores as committed developments. The result for Non-central stores in Perth and Kinross, as shown in Figure 3.2 above, is that the over-supply forecasts rise to about -3,400 sqm net sales area in 2028. The over-supply forecasts fall slightly to -2,650 sqm net sales area under Scenario 3 (see Figure 3.3) on the basis only the new/replacement Aldi foodstore comes forward by 2028.
- 3.12 This picture of over-supply indicates there is no quantitative ‘need’ to plan for new convenience goods floorspace in the Perth and Kinross area. In the absence of expenditure-based capacity to support additional floorspace, any new foodstore development (e.g. the Aldi and/or Lidl foodstores considered under Scenarios 2 and 3) are likely to be supported in expenditure terms by attracting market share from existing convenience goods floorspace. The likely trading impacts of such development on existing centres and stores is beyond the scope of this Partial Update; however, it is generally the case that the lower the expenditure-based capacity for additional floorspace, the greater the trading impacts are likely to be.

### **Comparison Goods Floorspace**

- 3.13 Our updated ‘baseline’ (Scenario 1) capacity forecasts for comparison goods floorspace are summarised in Figure 3.4 below. The Scenario 2 forecasts are summarised in Figure 3.5 below. There is no Scenario 3 for comparison goods floorspace because it would be the same as Scenario 1.
- 3.14 We show the capacity for new comparison goods floorspace (sqm net sales area), with the net available expenditure to support new floorspace shown in brackets/grey under the ‘sqm net sales area’ figures. The forecasts assume that any new comparison goods floorspace in the shopping destinations modelled would trade at a ‘generic’ average sales density of £5,500 per sqm net (grown from 2026 in line with estimated growth in sales density efficiencies).

**Figure 3.4 – Summary of capacity forecasts: comparison goods (sqm net sales area)**

<b>Scenario 1</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	Table number (Appendix B)
Perth City Centre	-350 (-£1.9m)	300 (£2.0m)	1,050 (£7.4m)	13
Kinross Town Centre	0 (< £0m)	0 (> £0m)	0 (£0.1m)	21
Auchterarder Town Centre	0 (< £0m)	50 (£0.2m)	50 (£0.4m)	29
Crieff Town Centre	0 (< £0m)	0 (£0.2m)	50 (£0.4m)	37
<b>Strathearn Area (sub-total)</b>	<b>0</b>	<b>50</b>	<b>100</b>	
Alyth Town Centre	0 (< £0m)	0 (> £0m)	0 (> £0m)	45
Blairgowrie Town Centre	-50 (-£0.2m)	0 (£0.01m)	50 (£0.5m)	53
Coupar Angus Town Centre	0 (< £0m)	0 (> £0m)	0 (£0.01m)	61
<b>Strathmore and the Glens (sub-total)</b>	<b>-50</b>	<b>0</b>	<b>50</b>	
Dunkeld & Birnam Town Centre	0 (< £0m)	0 (> £0m)	0 (£0.01m)	69
Aberfeldy Town Centre	0 (< £0m)	0 (£0.1m)	50 (£0.4m)	77
Pitlochry Town Centre	0 (< £0m)	0 (£0.1m)	50 (£0.4m)	85
<b>Highland Area (sub-total)</b>	<b>0</b>	<b>0</b>	<b>100</b>	
Non-central stores in Perth and Kinross	-3,500 (-£20.0m)	-3,000 (-£19.1m)	-2,450 (-17.2m)	94
<b>Combined forecasts for Perth and Kinross</b>	<b>-3,900</b>	<b>-2,650</b>	<b>-1,150</b>	

Notes:

a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

b) Forecasts rounded to the nearest 50 sqm net.

c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

**Figure 3.5 – Summary of capacity forecasts: comparison goods (sqm net sales area)**

<b>Scenario 2</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	Table number (Appendix B)
Non-central stores in Perth and Kinross	-3,700 (-£21.3m)	-3,250 (-£20.5m)	-2,700 (-£18.8m)	103
<b>Combined forecasts for Perth and Kinross</b>	<b>-4,100</b>	<b>-2,900</b>	<b>-1,400</b>	

Notes:

a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

b) Forecasts rounded to the nearest 50 sqm net.

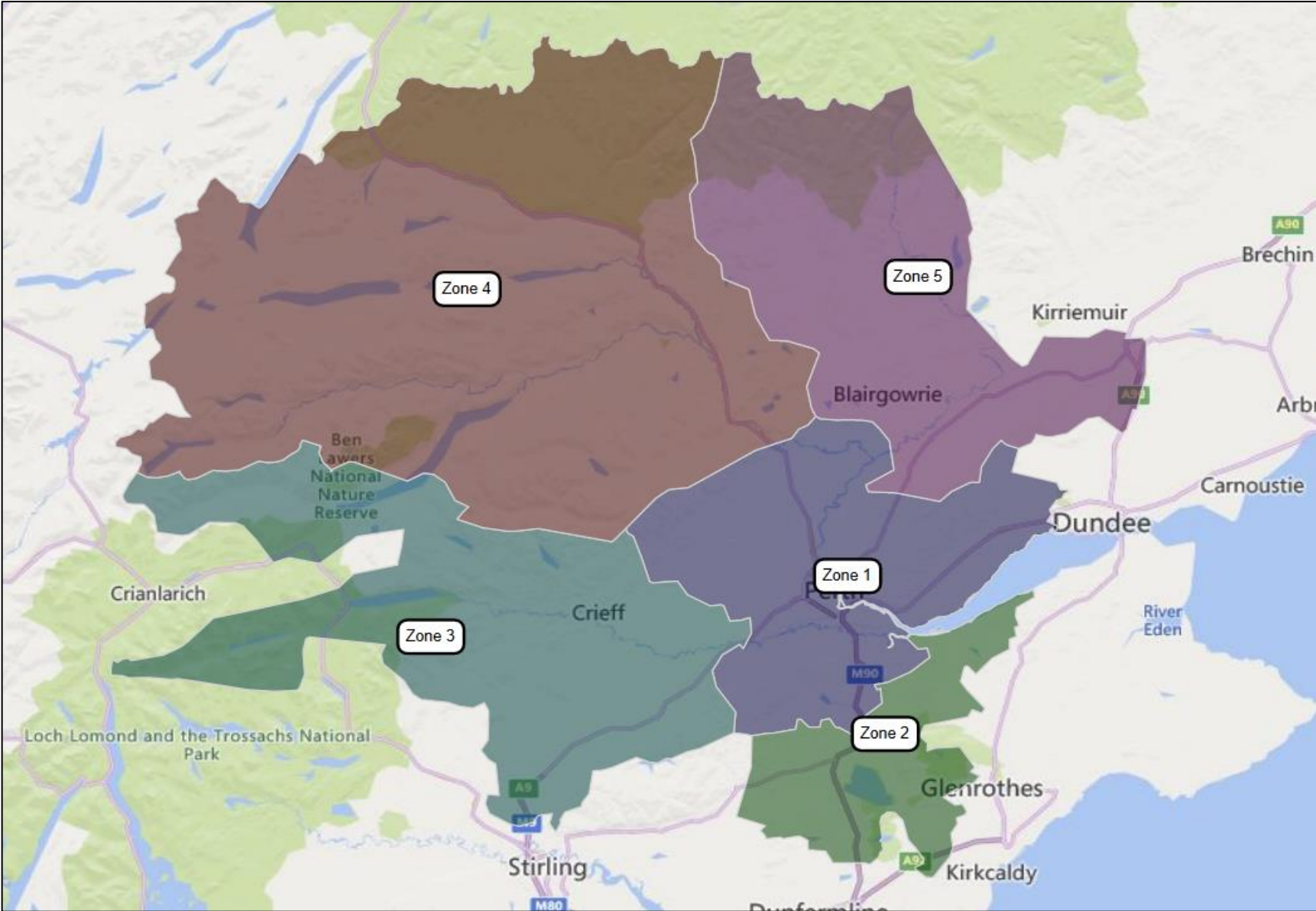
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

d) The Scenario 2 forecasts for Perth City Centre and each of the nine town centres are the same as those shown in Figure 3.4 (Scenario 1).

- 3.15 Figure 3.4 shows, under Scenario 1, there will be a theoretical over-supply of comparison goods floorspace in the Perth and Kinross area (about -3,900 sqm net sales area in 2028 falling to about -1,150 sqm net sales area by the end of the forecasting period). The over-supply forecasted is principally due to the 'negative' capacity forecasts for Non-central stores in Perth and Kinross.
- 3.16 Meanwhile, the forecasts for Perth City Centre from 2033 onwards suggest there will be limited capacity for new comparison goods floorspace (rising from about 300 sqm net sales area to about 1,050 sqm net sales area by 2038). This represents a notable change since the 2023 Study – which forecasted an over-supply of about -4,850 sqm net sales area in the City Centre by the end of the forecasting period – and is largely driven by the forecast growth in per capita comparison goods expenditure. However, we would caution that the return to 'positive' capacity forecasted is not entirely consistent with market conditions and the reality that comparison goods retailer demand remains limited and polarised towards the strongest locations. It is further the case that longer-term capacity forecasts (i.e. from 2033 onwards) are less certain as they are based on various assumptions and forecasts that can and will change.
- 3.17 Under the Scenario 2 forecasts, which account for the limited comparison goods floorspace in the proposed new Lidl foodstore, there will be a greater theoretical over-supply of comparison goods floorspace in the Perth and Kinross area.
- 3.18 Based on the foregoing, we would maintain the 2023 Study recommendation that there is no need to plan for new comparison goods floorspace in the Perth and Kinross area. That is not to say some new comparison goods floorspace may come forward, for example as part of mixed-use development at one or more of the key opportunity sites in Perth City Centre (subject to site-specific viability and other factors) as considered in the 2023 Study.

## **Appendix A**

Map of the catchment area



## **Appendix B**

Updated retail capacity tables

## Catchment Area Population and Expenditure

Table: 1  
CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year	Forecasting Years			
		2026	2028	2033	2038	BLANK
1	DD2 5; PH1 1, 2, 3, 4, 5; PH2 0, 6, 7, 8, 9; PH14 9	91,633	91,990	92,803	93,693	
2	KY4 0; KY5 0; KY6 3; KY13 0, 7, 8, 9; KY14 6, 7	40,213	40,350	40,743	41,155	
3	PH3 1; PH4 1; PH5 2; PH6 2; PH7 3, 4; FK15 0, 9; FK19 8; FK21 8	34,719	34,987	35,741	36,549	
4	PH8 0; PH9 0; PH15 2; PH16 5; PH17 2; PH18 5	12,712	12,773	13,050	13,320	
5	DD8 1; PH10 6, 7; PH11 8; PH12 8; PH13 9	28,852	28,919	29,183	29,462	
TOTAL		208,129	209,019	211,520	214,179	

Source:  
Precisely 'Geolinsight' Report for the Catchment Area (August 2022).

Table: 2  
CATCHMENT AREA PER CAPITA EXPENDITURE

Price Basis:		2024 Prices									
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS					
	Per Capita Expenditure Including Special Form of Trading										
	Base Year	Forecasting Years				Base Year	Forecasting Years				BLANK
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK	
1	3,024	3,003	2,970	2,940		4,690	4,879	5,537	6,295		
2	2,829	2,809	2,779	2,751		4,318	4,493	5,098	5,796		
3	3,060	3,029	3,005	2,975		4,824	5,019	5,695	6,475		
4	3,185	3,163	3,129	3,097		4,910	5,109	5,797	6,591		
5	3,030	3,008	2,975	2,946		4,612	4,798	5,445	6,190		
Catchment Area Average	3,003	2,982	2,949	2,920		4,642	4,830	5,481	6,231		
Expenditure on Special Forms of Trading (%)	5.4	5.7	6.4	7.1		26.1	27.0	28.7	30.4		
Catchment Zone	Per Capita Expenditure EXCLUDING* Special Form of Trading					Per Capita Expenditure EXCLUDING* Special Form of Trading					
	Base Year	Forecasting Years				Base Year	Forecasting Years				BLANK
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK	
1	2,861	2,832	2,780	2,731		3,466	3,562	3,948	4,381		
2	2,676	2,649	2,601	2,556		3,191	3,280	3,635	4,034		
3	2,895	2,866	2,813	2,764		3,565	3,664	4,061	4,507		
4	3,013	2,983	2,929	2,877		3,628	3,730	4,133	4,587		
5	2,866	2,837	2,785	2,737		3,408	3,503	3,882	4,308		
Catchment Area Average	2,841	2,812	2,760	2,713		3,430	3,526	3,908	4,337		

Source: Precisely 'Geolinsight' Report for the Catchment Area (August 2022) for per capita expenditure, with growth rates from Experian Retail Planner Briefing Note 23 (Appendix 4a). SFT deductions by CPW Planning with regard to Experian Retail Planner Briefing Note 23 (Appendix 3).

Table: 3  
CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	262,135	260,500	257,986	255,901		317,592	327,638	366,376	410,501	
2	107,619	106,883	105,980	105,179		128,320	132,344	148,097	166,020	
3	100,503	99,935	100,529	101,013		123,771	128,188	145,129	164,711	
4	38,301	38,098	38,220	38,322		46,125	47,638	53,938	61,102	
5	82,701	82,030	81,262	80,633		98,335	101,290	113,295	126,930	
TOTALS	591,260	587,446	583,975	581,049		714,143	737,097	826,836	929,265	

Source: Tables 1 and 2

Table: 4

**COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE**

Per Capita Comparison Goods Expenditure in	2026 for the catchment area as a whole							2024 Prices	
	Clothing & footwear	Furniture & floor coverings	Household textiles	Domestic appliances	Audio-visual & computer equipment	DIY goods & decorating supplies	Chemist's goods, medical & beauty products	All other comparison goods	Total Comparison Goods
Including SFT (£)	1,459	385	154	206	811	205	785	637	4,642
Deduction for SFT (%)	28.5	21.5	22.5	29.5	28.1	10.9	16.1	25.0	26.1
Excluding SFT (£)	1,043	302	119	145	583	183	659	478	3,430

Source: Precisely 'Geolinsight' Report for the Catchment Area (August 2022) for per capita expenditure.  
SFT deductions estimated by CPW Planning.

Table: 5

**CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN**

2026

Catchment Zone	Clothing & footwear (£000)	Furniture/ floor coverings (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemist, medical & beauty goods (£000)	All other comparison goods (£000)
1	96,579	27,980	11,049	13,445	53,985	16,920	60,975	44,230
2	39,022	11,305	4,464	5,433	21,812	6,836	24,636	17,871
3	37,638	10,904	4,306	5,240	21,039	6,594	23,763	17,237
4	14,027	4,064	1,605	1,953	7,840	2,457	8,856	6,424
5	29,903	8,663	3,421	4,163	16,715	5,239	18,880	13,695
TOTALS	217,169	62,917	24,846	30,234	121,391	38,046	137,109	99,457

Source: Tables 1 and 4

<b>Scenario</b>	<b>1</b>
<b>Perth City Centre</b>	

Table: **6**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Perth City Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	3.6	8.9	5.2
2	0.0	0.3	0.1
3	0.6	4.8	1.8
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **7**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Perth City Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
		Expenditure weighting							
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	62.5	31.0	24.3	14.3	12.1	7.3	52.0	68.4	44.1
2	32.8	18.1	15.4	6.7	10.1	3.7	7.9	38.6	20.7
3	36.6	21.7	17.1	6.1	4.0	7.6	14.3	34.3	22.0
4	70.6	51.7	33.3	11.3	18.8	11.1	10.2	52.2	39.7
5	21.2	10.5	2.7	0.0	2.3	1.2	2.9	11.5	9.8

Sources: Household Interview Survey 2022.  
Table 4 for expenditure weights.

Table:

8

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Perth City Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:				100	% of survey indicated figures			
		Comparison Goods:				100	% of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	5	5	5	5		44	44	44	44	
2	0	0	0	0		21	21	21	21	
3	2	2	2	2		22	22	22	22	
4	0	0	0	0		40	40	40	40	
5	0	0	0	0		10	10	10	10	

Sources: Tables 6 and 7.

Table: **9**  
**COMPARISON GOODS SALES BY GOODS TYPE IN** **2026**

Catchment Zones	2026 Sales in Perth City Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	60,391	8,674	2,685	1,928	6,521	1,232	31,707	30,236
2	12,783	2,051	686	362	2,210	253	1,936	6,889
3	13,791	2,370	734	320	842	501	3,389	5,912
4	9,903	2,101	535	221	1,474	274	901	3,353
5	6,349	906	93	0	391	60	538	1,575
TOTALS	103,216	16,101	4,733	2,831	11,438	2,320	38,471	47,966
MARKET SHARES	47.5%	25.6%	19.0%	9.4%	9.4%	6.1%	28.1%	48.2%

Table: **10**  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Perth City Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)		2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	13,107	13,025	12,899	12,795		139,740	144,161	161,206	180,621	
2	0	0	0	0		26,947	27,792	31,100	34,864	
3	2,010	1,999	2,011	2,020		27,230	28,201	31,928	36,237	
4	0	0	0	0		18,450	19,055	21,575	24,441	
5	0	0	0	0		9,834	10,129	11,330	12,693	
TOTALS	15,117	15,024	14,910	14,815		222,201	229,338	257,139	288,855	

Table: 11

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's Local (High Street)	248	95	236	13,209	3,112
Tesco Express (South Street)	1,393	90	1,254	15,430	19,345
M&S Foodhall (High Street)	700	100	700	10,379	7,265
Other convenience goods shops and stores	1,937	90	1,743	6,425	11,201
<b>ALL STORES</b>	<b>4,278</b>		<b>3,933</b>	<b>10,406</b>	<b>40,923</b>

Sources: Experian Goad (May 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning. GlobalData 2024.

Table: 12

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 13  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:	Perth City Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK
Residents' Spending £000	15,117	15,024	14,910	14,815		222,201	229,338	257,139	288,855	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0	
Total spending (£000)	15,570	15,474	15,357	15,260		233,311	240,805	269,996	303,298	
Existing shop floorspace (sq m net)	3,933	3,933	3,933	3,933		32,343	32,343	32,343	32,343	
Sales per sq m net (£)	3,959	10,406	10,406	10,406		7,214	7,505	8,286	9,149	
Sales from extg flrspce (£000)	15,570	40,923	40,923	40,923		233,311	242,737	268,001	295,895	
Available spending to support new shops (£000)	0	-25,449	-25,566	-25,664		0	-1,931	1,995	7,403	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-25,449	-25,566	-25,664		0	-1,931	1,995	7,403	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975	
Capacity for new shop flrspce (sq m net)	0	-2,213	-2,223	-2,232		0	-338	316	1,061	
Market Share of Catchment Area Expenditure	2.6%	2.6%	2.6%	2.5%		31.1%	31.1%	31.1%	31.1%	

<b>Scenario</b>	<b>1</b>
<b>Kinross Town Centre</b>	

Table: **14**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Kinross Town Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	7.2	2.2
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **15**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Kinross Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
		Expenditure weighting							
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.2
2	2.4	0.0	0.0	0.5	1.1	2.7	14.8	2.7	4.2
3	0.0	0.0	0.0	0.0	0.0	0.0	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
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

16

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Kinross Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	2	2	2	2		4	4	4	4	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 14 and 15.

Table: 17  
**COMPARISON GOODS SALES BY GOODS TYPE IN 2026**

Catchment Zones	2026 Sales in Kinross Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	549	0
2	937	0	0	25	246	186	3,646	483
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>937</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b>246</b>	<b>186</b>	<b>4,195</b>	<b>483</b>
<b>MARKET SHARES</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.2%</b>	<b>0.5%</b>	<b>3.1%</b>	<b>0.5%</b>

Table: 18  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Kinross Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)		2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	2,152	2,138	2,120	2,104		5,133	5,294	5,924	6,641	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	<b>2,152</b>	<b>2,138</b>	<b>2,120</b>	<b>2,104</b>		<b>5,133</b>	<b>5,294</b>	<b>5,924</b>	<b>6,641</b>	

Table: 19

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Local convenience goods shops and stores	893	90	804	6,425	5,164
<b>ALL STORES</b>	<b>893</b>		<b>804</b>	<b>6,425</b>	<b>5,164</b>

Sources: Experian Goad (April 2021), CPW Planning.

Table: 20

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 21  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:	Kinross Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK
Residents' Spending £000	2,152	2,138	2,120	2,104		5,133	5,294	5,924	6,641	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		-	-	-	-	
Total spending (£000)	2,217	2,202	2,183	2,167		5,133	5,294	5,924	6,641	
Existing shop floorspace (sq m net)	804	804	804	804		816	816	816	816	
Sales per sq m net (£)	2,758	6,425	6,425	6,425		6,290	6,544	7,225	7,977	
Sales from extg flrspce (£000)	2,217	5,164	5,164	5,164		5,133	5,340	5,896	6,510	
Available spending to support new shops (£000)	0	-2,962	-2,981	-2,997		0	-46	28	131	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-2,962	-2,981	-2,997		0	-46	28	131	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975	
Capacity for new shop flrspce (sq m net)	0	-258	-259	-261		0	-8	4	19	
Market Share of Catchment Area Expenditure	0.4%	0.4%	0.4%	0.4%		0.7%	0.7%	0.7%	0.7%	

<b>Scenario</b>	<b>1</b>
<b>Auchterarder Town Centre</b>	

Table: **22**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026			
Auchterarder Town Centre			
Zones	Main food	Top-up food	<b>WEIGHTED AVERAGE</b>
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.3	0.1
3	3.7	21.2	9.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **23**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to									
Auchterarder Town Centre									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	<b>WEIGHTED AVERAGE</b>
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	1,043	302	119	145	583	183	659	478	3,512
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.2
2	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.1
3	2.4	4.0	0.5	1.5	0.0	3.8	17.7	3.5	5.1
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table: 24

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario: 1		Location: Aughterarder Town Centre								
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	9	9	9	9		5	5	5	5	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 22 and 23.

Table: 25  
**COMPARISON GOODS SALES BY GOODS TYPE IN 2026**

Catchment Zones	2026 Sales in Auchterarder Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	707	0
2	0	0	0	0	0	0	175	0
3	903	436	22	79	0	249	4,197	603
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>903</b>	<b>436</b>	<b>22</b>	<b>79</b>	<b>0</b>	<b>249</b>	<b>5,079</b>	<b>603</b>
<b>MARKET SHARES</b>	<b>0.4%</b>	<b>0.7%</b>	<b>0.1%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>3.7%</b>	<b>0.6%</b>

Table: 26  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Auchterarder Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)		2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	9,045	8,994	9,048	9,091		6,189	6,409	7,256	8,236	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	<b>9,045</b>	<b>8,994</b>	<b>9,048</b>	<b>9,091</b>		<b>6,189</b>	<b>6,409</b>	<b>7,256</b>	<b>8,236</b>	

Table: 27

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (High Street)	507	95	482	11,607	5,591
Other convenience goods shops and stores	711	90	640	6,425	4,112
<b>ALL STORES</b>	<b>1,218</b>		<b>1,122</b>	<b>8,651</b>	<b>9,702</b>

Sources: Experian Goad (January 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning. GlobalData 2024.

Table: 28

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 29  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:		Auchterarder Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:		2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				COMPARISON GOODS						
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK	
Residents' Spending £000	9,045	8,994	9,048	9,091		6,189	6,409	7,256	8,236		
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0		
Total spending (£000)	9,317	9,264	9,319	9,364		6,498	6,730	7,619	8,647		
Existing shop floorspace (sq m net)	1,122	1,122	1,122	1,122		2,710	2,710	2,710	2,710		
Sales per sq m net (£)	8,307	8,651	8,651	8,651		2,398	2,494	2,754	3,041		
Sales from extg flrspce (£000)	9,317	9,702	9,702	9,702		6,498	6,760	7,464	8,241		
Available spending to support new shops (£000)	0	-438	-383	-338		0	-31	155	406		
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0		
Net available spending for new shops (£000)	0	-438	-383	-338		0	-31	155	406		
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975		
Capacity for new shop flrspce (sq m net)	0	-38	-33	-29		0	-5	25	58		
Market Share of Catchment Area Expenditure	1.5%	1.5%	1.5%	1.6%		0.9%	0.9%	0.9%	0.9%		

<b>Scenario</b>	<b>1</b>
<b>Crieff Town Centre</b>	

Table: **30**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Crieff Town Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.2	0.1
2	0.0	0.0	0.0
3	6.5	9.5	7.4
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **31**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Crieff Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	2.8	1.9	2.1	0.7	0.0	4.8	17.9	2.7	5.1
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

32

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Crieff Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	7	7	7	7		5	5	5	5	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 30 and 31.

Table: 33  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

2026

Catchment Zones	2026 Sales in Crieff Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	104	0
2	0	0	0	0	0	0	0	0
3	1,054	207	90	38	0	317	4,244	465
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	1,054	207	90	38	0	317	4,348	465
<b>MARKET SHARES</b>	0.5%	0.3%	0.4%	0.1%	0.0%	0.8%	3.2%	0.5%

Table: 34  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Crieff Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	7,035	6,995	7,037	7,071		6,189	6,409	7,256	8,236	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	7,035	6,995	7,037	7,071		6,189	6,409	7,256	8,236	

Table: 35

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Town Green)	943	95	896	11,607	10,398
Other convenience goods shops and stores	1,808	90	1,627	6,425	10,455
<b>ALL STORES</b>	<b>2,751</b>		<b>2,523</b>	<b>8,265</b>	<b>20,854</b>

Sources: Experian Goad (January 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning. GlobalData 2024.

Table: 36

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: **37**  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:		Crieff Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.												
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026		to	2038
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS						
	2026	2028	2033	2038		2026	2028	2033	2038		BLANK	
Residents' Spending £000	7,035	6,995	7,037	7,071		6,189	6,409	7,256	8,236			
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		3.0	3.0	3.0	3.0			
Total spending (£000)	7,246	7,205	7,248	7,283		6,374	6,602	7,474	8,483			
Existing shop floorspace (sq m net)	2,523	2,523	2,523	2,523		4,271	4,271	4,271	4,271			
Sales per sq m net (£)	2,872	8,265	8,265	8,265		1,492	1,553	1,714	1,893			
Sales from extg flrspce (£000)	7,246	20,854	20,854	20,854		6,374	6,632	7,322	8,084			
Available spending to support new shops (£000)	0	-13,648	-13,605	-13,571		0	-30	152	399			
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0			
Net available spending for new shops (£000)	0	-13,648	-13,605	-13,571		0	-30	152	399			
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975			
Capacity for new shop flrspc (sq m net)	0	-1,187	-1,183	-1,180		0	-5	24	57			
Market Share of Catchment Area Expenditure	1.2%	1.2%	1.2%	1.2%		0.9%	0.9%	0.9%	0.9%			

<b>Scenario</b>	<b>1</b>
<b>Alyth Town Centre</b>	

Table: **38**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Alyth Town Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.2	4.6	1.5

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **39**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Alyth Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	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	0.0	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
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	9.9	0.0	1.9

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

40

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Alyth Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	2	2	2	2		2	2	2	2	

Sources: Tables 38 and 39.

Table: **41**  
**COMPARISON GOODS SALES BY GOODS TYPE IN 2026**

Catchment Zones	2026 Sales in Alyth Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	1,865	0
<b>TOTALS</b>	0	0	0	0	0	0	1,865	0
<b>MARKET SHARES</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%

Table: **42**  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Alyth Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	1,654	1,641	1,625	1,613		1,967	2,026	2,266	2,539	
<b>TOTALS</b>	1,654	1,641	1,625	1,613		1,967	2,026	2,266	2,539	

Table: 43

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Market Square)	297	95	282	11,607	3,275
Premier (Commercial Street)	207	95	197	9,800	1,927
Other convenience goods shops and stores	108	98	106	6,425	680
<b>ALL STORES</b>	<b>612</b>		<b>585</b>	<b>10,061</b>	<b>5,882</b>

Sources: CPW Planning, The Retail Group, ProMap, GlobalData 2024.

Table: 44

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	-		-		-
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	-		-		-

Sources:

Table: 45

**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:		Alyth Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.												
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026		to	2038
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS						
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK		
Residents' Spending £000	1,654	1,641	1,625	1,613		1,967	2,026	2,266	2,539			
Plus visitors' spending (%)	-	-	-	-		-	-	-	-			
Total spending (£000)	1,654	1,641	1,625	1,613		1,967	2,026	2,266	2,539			
Existing shop floorspace (sq m net)	585	585	585	585		308	308	308	308			
Sales per sq m net (£)	2,829	10,061	10,061	10,061		6,388	6,646	7,338	8,102			
Sales from extg flrspace (£000)	1,654	5,882	5,882	5,882		1,967	2,046	2,259	2,494			
Available spending to support new shops (£000)	0	-4,242	-4,257	-4,269		0	-20	7	44			
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0			
Net available spending for new shops (£000)	0	-4,242	-4,257	-4,269		0	-20	7	44			
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975			
Capacity for new shop flrspace (sq m net)	0	-369	-370	-371		0	-4	1	6			
Market Share of Catchment Area Expenditure	0.3%	0.3%	0.3%	0.3%		0.3%	0.3%	0.3%	0.3%			

<b>Scenario</b>	<b>1</b>
<b>Blairgowrie Town Centre</b>	

Table: **46**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Blairgowrie Town Centre			
Zones	Main food	Top-up food	<b>WEIGHTED AVERAGE</b>
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.9	0.3	0.7
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.5	0.0	0.4
5	19.4	8.3	16.1

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **47**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Blairgowrie Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	<b>WEIGHTED AVERAGE</b>
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	0.0	0.0	0.2	0.9	0.3	0.2	2.9	3.5	1.1
2	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	0.0	0.0	0.0	0.0
4	0.0	2.4	0.7	3.3	0.9	0.0	0.0	1.2	0.7
5	3.6	15.9	8.3	30.8	13.0	22.3	31.1	18.2	15.6

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table: 48

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario: 1		Location: Blairgowrie Town Centre								
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	1	1	1	1	1	1	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	1	1	1	1	1
5	16	16	16	16	16	16	16	16	16	16

Sources: Tables 46 and 47.

Table: 49  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

2026

Catchment Zones	2026 Sales in Blairgowrie Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	23	117	135	29	1,768	1,526
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	98	11	64	74	0	0	77
5	1,071	1,381	282	1,282	2,166	1,168	5,872	2,490
<b>TOTALS</b>	1,071	1,479	317	1,463	2,375	1,197	7,640	4,093
<b>MARKET SHARES</b>	0.5%	2.4%	1.3%	4.8%	2.0%	3.1%	5.6%	4.1%

Table: 50  
**FORECAST RETAIL SALES**

50

Scenario:	1	Location:	Blairgowrie Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)		2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	2,621	2,605	2,580	2,559		3,176	3,276	3,664	4,105	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		461	476	539	611	
5	13,232	13,125	13,002	12,901		15,734	16,206	18,127	20,309	
<b>TOTALS</b>	15,853	15,730	15,582	15,460		19,371	19,959	22,330	25,025	

Table: 51

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Superstore (Welton Road)	2,285	80	1,828	15,430	28,206
Sainsbury's Local (High Street)	765	95	727	13,209	9,600
Other convenience goods shops and stores	1,850	90	1,665	6,425	10,698
<b>ALL STORES</b>	<b>4,900</b>		<b>4,220</b>	<b>11,495</b>	<b>48,504</b>

Sources: Experian Goad (December 2021). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning. GlobalData 2024.

Table: 52

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 53  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:		Blairgowrie Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:		2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				COMPARISON GOODS						
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK	
Residents' Spending £000	15,853	15,730	15,582	15,460		19,371	19,959	22,330	25,025		
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		3.0	3.0	3.0	3.0		
Total spending (£000)	16,329	16,202	16,049	15,924		19,952	20,558	23,000	25,776		
Existing shop floorspace (sq m net)	4,220	4,220	4,220	4,220		7,977	7,977	7,977	7,977		
Sales per sq m net (£)	3,870	11,495	11,495	11,495		2,501	2,602	2,873	3,172		
Sales from extg flrspce (£000)	16,329	48,504	48,504	48,504		19,952	20,758	22,919	25,304		
Available spending to support new shops (£000)	0	-32,302	-32,455	-32,580		0	-200	82	472		
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0		
Net available spending for new shops (£000)	0	-32,302	-32,455	-32,580		0	-200	82	472		
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975		
Capacity for new shop flrspc (sq m net)	0	-2,809	-2,822	-2,833		0	-35	13	68		
Market Share of Catchment Area Expenditure	2.7%	2.7%	2.7%	2.7%		2.7%	2.7%	2.7%	2.7%		

<b>Scenario</b>	<b>1</b>
<b>Coupar Angus Town Centre</b>	

Table: **54** **CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Coupar Angus Town Centre			
Zones	Main food	Top-up food	<b>WEIGHTED AVERAGE</b>
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **55** **COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Coupar Angus Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	<b>WEIGHTED AVERAGE</b>
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.2
2	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	0.0	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
5	0.0	0.0	0.0	0.0	0.0	0.4	14.1	3.6	3.2

Sources: Household Interview Survey 2022.  
Table 4 for expenditure weights.

Table:

56

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Coupar Angus Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		3	3	3	3	

Sources: Tables 54 and 55.

Table: 57  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

2026

Catchment Zones	Sales in Coupar Angus Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	726	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	20	2,658	498
<b>TOTALS</b>	0	0	0	0	0	20	3,384	498
<b>MARKET SHARES</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	2.5%	0.5%

Table: 58  
**FORECAST RETAIL SALES**

58

Scenario:	1	Location:	Coupar Angus Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.									
Catchment zone	RETAIL SALES BY CATCHMENT ZONE								
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS			
2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	2026 (£000)		2028 (£000)	2033 (£000)	2038 (£000)	
1					0	0	0	0	
2	<b>BLANK</b>				0	0	0	0	
3	<b>(NO MARKET SHARE DATA)</b>				0	0	0	0	
4					0	0	0	0	
5					2,950	3,039	3,399	3,808	
<b>TOTALS</b>					2,950	3,039	3,399	3,808	

Table: 59

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Premier (George Street)	63	95	60	9,800	587
Scotmid Co-operative (George Street)	90	95	86	11,607	992
Other convenience goods shops and stores	63	98	62	6,425	397
<b>ALL STORES</b>	<b>216</b>		<b>207</b>	<b>9,540</b>	<b>1,976</b>

Sources: CPW Planning, The Retail Group, ProMap, GlobalData 2024.

Table: 60

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 61  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:	Coupair Angus Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in					2026		Comparison Goods:	2.00 % pa	2026 to 2038	
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK
Residents' Spending £000						2,950	3,039	3,399	3,808	
Plus visitors' spending (%)						-	-	-	-	
Total spending (£000)						2,950	3,039	3,399	3,808	
Existing shop floorspace (sq m net)						281	281	281	281	
Sales per sq m net (£)						10,502	10,926	12,063	13,319	
Sales from extg flrspce (£000)						2,950	3,069	3,389	3,741	
Available spending to support new shops (£000)			BLANK			0	-31	10	67	
Less sales capacity of committed new floorspace (£000)						0	0	0	0	
Net available spending for new shops (£000)						0	-31	10	67	
Sales per sq m net in new shops (£)						5,500	5,722	6,318	6,975	
Capacity for new shop flrspc (sq m net)						0	-5	2	10	
Market Share of Catchment Area Expenditure						0.4%	0.4%	0.4%	0.4%	

<b>Scenario</b>	<b>1</b>
<b>Dunkeld &amp; Birnam Town Centre</b>	

Table: **62**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Dunkeld & Birnam Town Centre			
Zones	Main food	Top-up food	<b>WEIGHTED AVERAGE</b>
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	2.1	9.9	4.5
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **63**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Dunkeld & Birnam Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	<b>WEIGHTED AVERAGE</b>
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
2	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	0.0	0.0	0.0	0.0
4	0.9	0.0	0.7	0.0	0.0	0.5	12.6	3.5	3.2
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

64

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Dunkeld & Birnam Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	4	4	4	4		3	3	3	3	
5	0	0	0	0		0	0	0	0	

Sources: Tables 62 and 63.

Table: **65**  
**COMPARISON GOODS SALES BY GOODS TYPE IN** **2026**

Catchment Zones	2026 Sales in Dunkeld & Birnam Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	261	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	123	0	11	0	0	13	1,115	227
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>384</b>	<b>0</b>	<b>11</b>	<b>0</b>	<b>0</b>	<b>13</b>	<b>1,115</b>	<b>227</b>
<b>MARKET SHARES</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.2%</b>

Table: **66**  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Dunkeld & Birnam Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)		2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	1,532	1,524	1,529	1,533		1,384	1,429	1,618	1,833	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	<b>1,532</b>	<b>1,524</b>	<b>1,529</b>	<b>1,533</b>		<b>1,384</b>	<b>1,429</b>	<b>1,618</b>	<b>1,833</b>	

Table: 67

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Bridge Street)	108	95	103	11,607	1,191
Other convenience goods shops and stores	405	98	397	6,425	2,550
<b>ALL STORES</b>	<b>513</b>		<b>500</b>	<b>7,490</b>	<b>3,741</b>

Sources: CPW Planning, The Retail Group, ProMap, GlobalData 2024.

Table: 68

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 69  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:	Dunkeld & Birnam Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026	2028	2033	2038		2026	2028	2033	2038	BLANK
Residents' Spending £000	1,532	1,524	1,529	1,533		1,384	1,429	1,618	1,833	
Plus visitors' spending (%)	10.0	10.0	10.0	10.0		20.0	20.0	20.0	20.0	
Total spending (£000)	1,685	1,676	1,682	1,686		1,661	1,715	1,942	2,200	
Existing shop floorspace (sq m net)	500	500	500	500		464	464	464	464	
Sales per sq m net (£)	3,374	7,490	7,490	7,490		3,579	3,723	4,111	4,539	
Sales from extg flrspce (£000)	1,685	3,741	3,741	3,741		1,661	1,728	1,907	2,106	
Available spending to support new shops (£000)	0	-2,065	-2,059	-2,055		0	-13	34	94	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-2,065	-2,059	-2,055		0	-13	34	94	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975	
Capacity for new shop flrspc (sq m net)	0	-180	-179	-179		0	-2	5	13	
Market Share of Catchment Area Expenditure	0.3%	0.3%	0.3%	0.3%		0.2%	0.2%	0.2%	0.2%	

<b>Scenario</b>	<b>1</b>
<b>Aberfeldy Town Centre</b>	

Table: **70**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Aberfeldy Town Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	23.1	20.0	22.2
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **71**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Aberfeldy Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
		Expenditure weighting							
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	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	0.0	0.0	0.0	0.0
3	2.6	0.6	0.0	0.0	0.0	1.9	0.0	0.0	0.9
4	7.7	5.1	4.8	0.0	0.0	6.5	26.5	14.9	10.2
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

72

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Aberfeldy Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		1	1	1	1	
4	22	22	22	22		10	10	10	10	
5	0	0	0	0		0	0	0	0	

Sources: Tables 70 and 71.

Table: **73**  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

**2026**

Catchment Zones	2026 Sales in Aberfeldy Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	982	62	0	0	0	125	0	0
4	1,086	207	77	0	0	158	2,344	958
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>2,068</b>	<b>269</b>	<b>77</b>	<b>0</b>	<b>0</b>	<b>284</b>	<b>2,344</b>	<b>958</b>
<b>MARKET SHARES</b>	<b>1.0%</b>	<b>0.4%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>1.7%</b>	<b>1.0%</b>

Table: **74**  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Aberfeldy Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		1,238	1,282	1,451	1,647	
4	8,426	8,382	8,408	8,431		4,613	4,764	5,394	6,110	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	<b>8,426</b>	<b>8,382</b>	<b>8,408</b>	<b>8,431</b>		<b>5,850</b>	<b>6,046</b>	<b>6,845</b>	<b>7,757</b>	

Table: 75

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Dunkeld Street)	135	95	128	11,607	1,489
Premier (Bank Street)	162	95	154	9,800	1,508
Other convenience goods shops and stores	225	98	221	6,425	1,417
<b>ALL STORES</b>	<b>522</b>		<b>503</b>	<b>8,781</b>	<b>4,414</b>

Sources: CPW Planning, The Retail Group, ProMap, GlobalData 2024.

Table: 76

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 77  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:	Aberfeldy Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK
Residents' Spending £000	8,426	8,382	8,408	8,431		5,850	6,046	6,845	7,757	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0	
Total spending (£000)	8,679	8,633	8,661	8,684		6,143	6,348	7,187	8,145	
Existing shop floorspace (sq m net)	503	503	503	503		1,354	1,354	1,354	1,354	
Sales per sq m net (£)	17,267	8,781	8,781	8,781		4,537	4,721	5,212	5,754	
Sales from extg flrspce (£000)	8,679	4,414	4,414	4,414		6,143	6,391	7,056	7,791	
Available spending to support new shops (£000)	0	4,219	4,247	4,270		0	-43	131	355	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	4,219	4,247	4,270		0	-43	131	355	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975	
Capacity for new shop flrspce (sq m net)	0	367	369	371		0	-8	21	51	
Market Share of Catchment Area Expenditure	1.4%	1.4%	1.4%	1.5%		0.8%	0.8%	0.8%	0.8%	

<b>Scenario</b>	<b>1</b>
<b>Pitlochry Town Centre</b>	

Table: **78**  
**CONVENIENCE GOODS MARKET SHARES IN** **2026**

2026 Pitlochry Town Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	20.7	49.3	29.3
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **79**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN** **2026**

2026 Allocations to Pitlochry Town Centre Indicated by Household Interview Survey									
Zones	Clothing & footwear Q7	Furniture/ floor coverings etc Q8	Household Textiles Q9	Household Appliances Q10	Audio-visual equipment Q11	Hardware, DIY, garden products Q12	Chemist, medical & beauty goods Q13	All other comparison gds Q14	WEIGHTED AVERAGE
	Expenditure weighting								
	1,043 (%)	302 (%)	119 (%)	145 (%)	583 (%)	183 (%)	659 (%)	478 (%)	3,512 (%)
1	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	0.0	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
4	4.4	0.0	0.7	1.1	0.0	12.2	40.3	14.4	11.5
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table:

80

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Pitlochry Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					100 % of survey indicated figures			
		Comparison Goods:					100 % of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	29	29	29	29		12	12	12	12	
5	0	0	0	0		0	0	0	0	

Sources: Tables 78 and 79.

Table:

81

**COMPARISON GOODS SALES BY GOODS TYPE IN**

**2026**

Catchment Zones	2026 Sales in Pitlochry Town Centre							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	613	0	11	21	0	301	3,567	928
5	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>613</b>	<b>0</b>	<b>11</b>	<b>21</b>	<b>0</b>	<b>301</b>	<b>3,567</b>	<b>928</b>
<b>MARKET SHARES</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>2.6%</b>	<b>0.9%</b>

Table:

82

**FORECAST RETAIL SALES**

Scenario:	1	Location:	Pitlochry Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	11,107	11,048	11,084	11,113		5,535	5,717	6,473	7,332	
5	0	0	0	0		0	0	0	0	
<b>TOTALS</b>	<b>11,107</b>	<b>11,048</b>	<b>11,084</b>	<b>11,113</b>		<b>5,535</b>	<b>5,717</b>	<b>6,473</b>	<b>7,332</b>	

Table: 83

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

**2026**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (West Moulin Road)	748	95	711	11,607	8,248
Other convenience goods shops and stores	791	90	712	6,425	4,574
<b>ALL STORES</b>	<b>1,539</b>		<b>1,423</b>	<b>9,014</b>	<b>12,822</b>

Sources: Experian Goad (December 2021). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning. GlobalData 2024.

Table: 84

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

**2026**

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
<b>ALL STORES</b>	<b>-</b>		<b>-</b>		<b>-</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
<b>ALL STORES AND SCHEMES</b>	<b>-</b>		<b>-</b>		<b>-</b>

Sources:

Table: 85  
**FORECAST RETAIL CAPACITY**

Scenario:	1		Location:		Pitlochry Town Centre						
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:		2.00 % pa		2026 to 2038	
	CONVENIENCE GOODS				COMPARISON GOODS						
	2026	2028	2033	2038	BLANK	2026	2028	2033	2038	BLANK	
Residents' Spending £000	11,107	11,048	11,084	11,113		5,535	5,717	6,473	7,332		
Plus visitors' spending (%)	15.0	15.0	15.0	15.0		25.0	25.0	25.0	25.0		
Total spending (£000)	12,774	12,706	12,746	12,780		6,919	7,146	8,091	9,165		
Existing shop floorspace (sq m net)	1,423	1,423	1,423	1,423		4,484	4,484	4,484	4,484		
Sales per sq m net (£)	8,980	9,014	9,014	9,014		1,543	1,605	1,772	1,957		
Sales from extg flrspce (£000)	12,774	12,822	12,822	12,822		6,919	7,198	7,948	8,775		
Available spending to support new shops (£000)	0	-116	-76	-42		0	-53	143	391		
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0		
Net available spending for new shops (£000)	0	-116	-76	-42		0	-53	143	391		
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975		
Capacity for new shop flrspc (sq m net)	0	-10	-7	-4		0	-9	23	56		
Market Share of Catchment Area Expenditure	1.9%	1.9%	1.9%	1.9%		0.8%	0.8%	0.8%	0.8%		

**Scenario 1**  
**Non-central stores in the Perth and Kinross area**

Table: **86**  
**CONVENIENCE GOODS MARKET SHARES IN 2026**

2026			
Non-central stores in the Perth and Kinross area			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	85.7	62.9	78.9
2	38.0	39.1	38.3
3	41.3	12.2	32.6
4	49.5	8.5	37.2
5	18.1	26.9	20.7

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **87**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026**

2026 Allocations to									
Non-central stores in the Perth and Kinross area									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	1,043	302	119	145	583	183	659	478	3,512
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	14.7	23.7	59.6	69.6	70.4	79.7	19.7	21.5	33.8
2	4.2	14.9	34.2	20.9	25.1	23.4	1.2	9.8	11.5
3	5.0	12.8	41.5	43.4	50.0	40.6	5.5	9.7	18.6
4	6.7	28.0	58.4	84.3	76.2	65.8	8.5	5.9	28.3
5	0.5	2.0	24.6	7.9	11.1	18.2	3.2	7.9	5.9

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table: 88

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	1	Location:	Non-central stores in the Perth and Kinross area									
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.												
Market shares correction factors:		Convenience Goods:						100 % of survey indicated figures				
		Comparison Goods:						100 % of survey indicated figures				
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS						
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)		
1	79	79	79	79		34	34	34	34			
2	38	38	38	38		11	11	11	11			
3	33	33	33	33		19	19	19	19			
4	37	37	37	37		28	28	28	28			
5	21	21	21	21		6	6	6	6			

Sources: Tables 86 and 87.

Table: **89**  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

**2026**

Catchment Zones	Sales in Non-central stores in the Perth and Kinross area							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	14,197	6,623	6,583	9,363	38,027	13,480	12,006	9,510
2	1,623	1,681	1,529	1,135	5,468	1,598	288	1,744
3	1,882	1,391	1,788	2,274	10,519	2,674	1,307	1,672
4	936	1,138	937	1,646	5,974	1,618	753	379
5	150	170	843	328	1,850	952	598	1,082
<b>TOTALS</b>	<b>18,787</b>	<b>11,003</b>	<b>11,680</b>	<b>14,746</b>	<b>61,838</b>	<b>20,322</b>	<b>14,952</b>	<b>14,387</b>
<b>MARKET SHARES</b>	<b>8.7%</b>	<b>17.5%</b>	<b>47.0%</b>	<b>48.8%</b>	<b>50.9%</b>	<b>53.4%</b>	<b>10.9%</b>	<b>14.5%</b>

Table: **90**  
**FORECAST RETAIL SALES**

Scenario:	1	Location:	Non-central stores in the Perth and Kinross area							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)
1	207,087	205,795	203,809	202,162		107,981	111,397	124,568	139,570	
2	40,895	40,615	40,272	39,968		14,115	14,558	16,291	18,262	
3	33,166	32,979	33,175	33,334		23,516	24,356	27,574	31,295	
4	14,172	14,096	14,141	14,179		12,915	13,339	15,103	17,109	
5	17,367	17,226	17,065	16,933		5,900	6,077	6,798	7,616	
<b>TOTALS</b>	<b>312,687</b>	<b>310,712</b>	<b>308,462</b>	<b>306,576</b>		<b>164,428</b>	<b>169,726</b>	<b>190,334</b>	<b>213,852</b>	

Table: 91

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Aldi (Broich Road - Crieff)	1,254	80	1,003	11,356	11,392
Aldi (Glasgow Road - Perth)	938	80	750	11,356	8,522
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,250	80	1,000	11,356	11,356
Asda (Dunkeld Road - Perth)	5,483	65	3,564	10,547	37,589
Iceland: The Food Warehouse (St Catherines Retail Park - Perth)	1,115	100	1,115	6,798	7,580
Lidl (Perth Road - Blairgowrie)	1,300	85	1,105	8,308	9,180
Lidl (Riggs Road - Perth)	1,126	85	957	8,308	7,952
M&S Foodhall (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,115	95	1,059	10,659	11,291
Morrisons (Caledonian Road - Perth)	3,476	85	2,955	10,379	30,666
Sainsbury's (Station Road - Kinross)	2,030	85	1,726	13,209	22,792
Tesco Extra (Crieff Road - Perth)	5,504	65	3,578	15,430	55,202
Tesco Superstore (Edinburgh Road - Perth)	3,710	75	2,783	15,430	42,934
Other (estimated) convenience goods shops and stores	7,500	95	7,125	8,996	64,094
<b>ALL STORES</b>	<b>35,801</b>		<b>28,719</b>	<b>11,162</b>	<b>320,549</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Table: 92

**SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE**

Store	Gross Firspe (sq m)	Net Firspe (sq m)	Sales Density (£per sqm net)	Sales (£000)
St Catherines Retail Park (St Catherines Road - Perth) (1)	18,010	15,604	5,246	81,858
Inveralmond Retail Park (Ruthvenfield Road - Perth)	3,800	3,420	4,896	16,745
Inveralmond Trade Park (Ruthvenfield Road - Perth) (2)	1,600	1,224	4,663	5,708
<i>Solus retail warehouses:</i>				
B&Q (Crieff Road - Perth) (3)	5,806	3,484	1,982	6,904
B&M Store and Garden Centre (Broich Road - Crieff)	n/a	1,104	2,098	2,317
Home Bargains (Perth Road - Blairgowrie)	n/a	1,995	2,098	4,186
<i>Main foodstores - comparison goods floorspace:</i>				
Aldi (Broich Road - Crieff)	n/a	251	8,580	2,152
Aldi (Glasgow Road - Perth)	n/a	188	8,580	1,610
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	n/a	250	8,580	2,145
Asda (Dunkeld Road - Perth)	n/a	1,919	6,675	12,810
Lidl (Perth Road - Blairgowrie)	n/a	195	4,677	912
Lidl (Riggs Road - Perth)	n/a	169	4,677	790
Morrisons (Caledonian Road - Perth)	n/a	521	5,031	2,623
Sainsbury's (Station Road - Kinross)	n/a	305	8,677	2,642
Tesco Extra (Crieff Road - Perth)	n/a	1,926	9,018	17,372
Tesco Superstore (Edinburgh Road - Perth)	n/a	928	9,018	8,364
<b>TOTALS Trading at the date of the Household Interview Survey 2022</b>		<b>33,482</b>	<b>5,052</b>	<b>169,137</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Notes: (1) Includes net sales area deduction for trade and/or non-retail sales associated with Halfords and Wickes.  
(2) Includes net sales area deduction for trade and/or non-retail sales associated with Screwfix and Toolstation.  
(3) 4,645 sq m net sales but 25% excluded for trade and/or non-retail sales.

Table: 93

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

2026

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	1,393	80	1,114	15,430	17,195
<b>ALL STORES</b>	<b>1,393</b>		<b>1,114</b>		<b>17,195</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	2,586		279	9,018	2,516
Proposed additional retail (The House of Bruar, Blair Atholl, Pitlochry) - application ref. 23/01379/FL	1,461		1,461	6,000	8,766
<b>ALL STORES AND SCHEMES</b>	<b>4,047</b>		<b>1,740</b>		<b>11,282</b>

Sources: Perth &amp; Kinross Council. CPW Planning.

Table: **94**  
**FORECAST RETAIL CAPACITY**

Scenario: 1		Location: Non-central stores in the Perth and Kinross area									
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to		2038
		CONVENIENCE GOODS				BLANK	COMPARISON GOODS				BLANK
		2026	2028	2033	2038		2026	2028	2033	2038	
Residents' Spending £000		312,687	310,712	308,462	306,576		164,428	169,726	190,334	213,852	
Plus visitors' spending (%)		-	-	-	-		3.0	3.0	3.0	3.0	
Total spending (£000)		312,687	310,712	308,462	306,576		169,361	174,818	196,044	220,268	
Existing shop floorspace (sq m net)		28,719	28,719	28,719	28,719		33,482	33,482	33,482	33,482	
Sales per sq m net (£)		10,888	11,162	11,162	11,162		5,058	5,468	6,037	6,665	
Sales from extg flrspe (£000)		312,687	320,549	320,549	320,549		169,361	183,080	202,135	223,173	
Available spending to support new shops (£000)		0	-9,837	-12,087	-13,972		0	-8,262	-6,091	-2,906	
Less sales capacity of committed new floorspace (£000)		0	17,195	17,195	17,195		0	11,738	12,959	14,308	
Net available spending for new shops (£000)		0	-27,033	-29,282	-31,168		0	-19,999	-19,051	-17,214	
Sales per sq m net in new shops (£)		11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975	
Capacity for new shop flrspe (sq m net)		0	-2,351	-2,546	-2,710		0	-3,495	-3,015	-2,468	
Market Share of Catchment Area Expenditure		52.9%	52.9%	52.8%	52.8%		23.0%	23.0%	23.0%	23.0%	

Sources: CPW Planning. Table 92 for existing comparison goods floorspace.

Notes:

**Scenario 2**  
**Non-central stores in the Perth and Kinross area**

Table: **95**  
**CONVENIENCE GOODS MARKET SHARES IN 2026**

2026			
Non-central stores in the Perth and Kinross area			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	85.7	62.9	78.9
2	38.0	39.1	38.3
3	41.3	12.2	32.6
4	49.5	8.5	37.2
5	18.1	26.9	20.7

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **96**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026**

2026 Allocations to									
Non-central stores in the Perth and Kinross area									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	1,043	302	119	145	583	183	659	478	3,512
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	14.7	23.7	59.6	69.6	70.4	79.7	19.7	21.5	33.8
2	4.2	14.9	34.2	20.9	25.1	23.4	1.2	9.8	11.5
3	5.0	12.8	41.5	43.4	50.0	40.6	5.5	9.7	18.6
4	6.7	28.0	58.4	84.3	76.2	65.8	8.5	5.9	28.3
5	0.5	2.0	24.6	7.9	11.1	18.2	3.2	7.9	5.9

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table: 97

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	2	Location:	Non-central stores in the Perth and Kinross area									
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.												
Market shares correction factors:		Convenience Goods:						100 % of survey indicated figures				
		Comparison Goods:						100 % of survey indicated figures				
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS						
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)		
1	79	79	79	79		34	34	34	34			
2	38	38	38	38		11	11	11	11			
3	33	33	33	33		19	19	19	19			
4	37	37	37	37		28	28	28	28			
5	21	21	21	21		6	6	6	6			

Sources: Tables 86 and 87.

Table: 98  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

2026

Catchment Zones	Sales in Non-central stores in the Perth and Kinross area							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	14,197	6,623	6,583	9,363	38,027	13,480	12,006	9,510
2	1,623	1,681	1,529	1,135	5,468	1,598	288	1,744
3	1,882	1,391	1,788	2,274	10,519	2,674	1,307	1,672
4	936	1,138	937	1,646	5,974	1,618	753	379
5	150	170	843	328	1,850	952	598	1,082
<b>TOTALS</b>	<b>18,787</b>	<b>11,003</b>	<b>11,680</b>	<b>14,746</b>	<b>61,838</b>	<b>20,322</b>	<b>14,952</b>	<b>14,387</b>
<b>MARKET SHARES</b>	<b>8.7%</b>	<b>17.5%</b>	<b>47.0%</b>	<b>48.8%</b>	<b>50.9%</b>	<b>53.4%</b>	<b>10.9%</b>	<b>14.5%</b>

Table: 99  
**FORECAST RETAIL SALES**

Scenario:	2		Location: Non-central stores in the Perth and Kinross area							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)
1	207,087	205,795	203,809	202,162		107,981	111,397	124,568	139,570	
2	40,895	40,615	40,272	39,968		14,115	14,558	16,291	18,262	
3	33,166	32,979	33,175	33,334		23,516	24,356	27,574	31,295	
4	14,172	14,096	14,141	14,179		12,915	13,339	15,103	17,109	
5	17,367	17,226	17,065	16,933		5,900	6,077	6,798	7,616	
<b>TOTALS</b>	<b>312,687</b>	<b>310,712</b>	<b>308,462</b>	<b>306,576</b>		<b>164,428</b>	<b>169,726</b>	<b>190,334</b>	<b>213,852</b>	

Table: 100

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Aldi (Broich Road - Crieff)	1,254	80	1,003	11,356	11,392
Aldi (Glasgow Road - Perth)	938	80	750	11,356	8,522
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,250	80	1,000	11,356	11,356
Asda (Dunkeld Road - Perth)	5,483	65	3,564	10,547	37,589
Iceland: The Food Warehouse (St Catherines Retail Park - Perth)	1,115	100	1,115	6,798	7,580
Lidl (Perth Road - Blairgowrie)	1,300	85	1,105	8,308	9,180
Lidl (Riggs Road - Perth)	1,126	85	957	8,308	7,952
M&S Foodhall (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,115	95	1,059	10,659	11,291
Morrisons (Caledonian Road - Perth)	3,476	85	2,955	10,379	30,666
Sainsbury's (Station Road - Kinross)	2,030	85	1,726	13,209	22,792
Tesco Extra (Crieff Road - Perth)	5,504	65	3,578	15,430	55,202
Tesco Superstore (Edinburgh Road - Perth)	3,710	75	2,783	15,430	42,934
Other (estimated) convenience goods shops and stores	7,500	95	7,125	8,996	64,094
<b>ALL STORES</b>	<b>35,801</b>		<b>28,719</b>	<b>11,162</b>	<b>320,549</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Table: 101

**SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE**

Store	Gross Firspsce (sq m)	Net Firspsce (sq m)	Sales Density (£per sqm net)	Sales (£000)
Net to gross ratio:	90 % (unless otherwise indicated)			2024
St Catherines Retail Park (St Catherines Road - Perth) (1)	18,010	15,604	5,246	81,858
Inveralmond Retail Park (Ruthvenfield Road - Perth)	3,800	3,420	4,896	16,745
Inveralmond Trade Park (Ruthvenfield Road - Perth) (2)	1,600	1,224	4,663	5,708
<i>Solus retail warehouses:</i>				
B&Q (Crieff Road - Perth) (3)	5,806	3,484	1,982	6,904
B&M Store and Garden Centre (Broich Road - Crieff)	n/a	1,104	2,098	2,317
Home Bargains (Perth Road - Blairgowrie)	n/a	1,995	2,098	4,186
<i>Main foodstores - comparison goods floorspace:</i>				
Aldi (Broich Road - Crieff)	n/a	251	8,580	2,152
Aldi (Glasgow Road - Perth)	n/a	188	8,580	1,610
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	n/a	250	8,580	2,145
Asda (Dunkeld Road - Perth)	n/a	1,919	6,675	12,810
Lidl (Perth Road - Blairgowrie)	n/a	195	4,677	912
Lidl (Riggs Road - Perth)	n/a	169	4,677	790
Morrisons (Caledonian Road - Perth)	n/a	521	5,031	2,623
Sainsbury's (Station Road - Kinross)	n/a	305	8,677	2,642
Tesco Extra (Crieff Road - Perth)	n/a	1,926	9,018	17,372
Tesco Superstore (Edinburgh Road - Perth)	n/a	928	9,018	8,364
<b>TOTALS Trading at the date of the Household Interview Survey 2022</b>		<b>33,482</b>	<b>5,052</b>	<b>169,137</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Notes:

- (1) Includes net sales area deduction for trade and/or non-retail sales associated with Halfords and Wickes.  
(2) Includes net sales area deduction for trade and/or non-retail sales associated with Screwfix and Toolstation.  
(3) 4,645 sq m net sales but 25% excluded for trade and/or non-retail sales.

Table: 102

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

2026

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	1,393	80	1,114	15,430	17,195
Proposed 'replacement' Aldi (Land west of 4 Pickembere, Perth) - application ref. 21/00248/FLL	377	80	302	11,356	3,425
Proposed Lidl (Land north of Crieff Road, Perth) - application ref. 23/02025/FLL	1,331	80	1,065	8,308	8,846
<b>ALL STORES</b>	<b>3,101</b>		<b>2,481</b>		<b>29,467</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	2,586		279	9,018	2,516
Proposed additional retail (The House of Bruar, Blair Atholl, Pitlochry) - application ref. 23/01379/FL	1,461		1,461	6,000	8,766
Proposed Lidl (Land north of Crieff Road, Perth) - application ref. 23/02025/FLL	1,979		266	4,677	1,244
<b>ALL STORES AND SCHEMES</b>	<b>6,026</b>		<b>2,006</b>		<b>12,526</b>

Sources: Perth &amp; Kinross Council. CPW Planning.

Notes: Proposed 'replacement' Aldi measures 1,315 sqm net but 377 sqm net accounting for the existing Aldi (938 sqm net) to be demolished and replaced.

Table: **103**  
**FORECAST RETAIL CAPACITY**

Scenario:	2		Location: <b>Non-central stores in the Perth and Kinross area</b>								
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to		2038
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS					
	2026	2028	2033	2038		2026	2028	2033	2038	BLANK	
Residents' Spending £000	312,687	310,712	308,462	306,576		164,428	169,726	190,334	213,852		
Plus visitors' spending (%)	-	-	-	-		3.0	3.0	3.0	3.0		
Total spending (£000)	312,687	310,712	308,462	306,576		169,361	174,818	196,044	220,268		
Existing shop floorspace (sq m net)	28,719	28,719	28,719	28,719		33,482	33,482	33,482	33,482		
Sales per sq m net (£)	10,888	11,162	11,162	11,162		5,058	5,468	6,037	6,665		
Sales from extg flrspe (£000)	312,687	320,549	320,549	320,549		169,361	183,080	202,135	223,173		
Available spending to support new shops (£000)	0	-9,837	-12,087	-13,972		0	-8,262	-6,091	-2,906		
Less sales capacity of committed new floorspace (£000)	0	29,467	29,467	29,467		0	13,032	14,389	15,886		
Net available spending for new shops (£000)	0	-39,304	-41,554	-43,439		0	-21,294	-20,480	-18,792		
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975		
<b>Capacity for new shop flrspe (sq m net)</b>	<b>0</b>	<b>-3,418</b>	<b>-3,613</b>	<b>-3,777</b>		<b>0</b>	<b>-3,721</b>	<b>-3,242</b>	<b>-2,694</b>		
Market Share of Catchment Area Expenditure	52.9%	52.9%	52.8%	52.8%		23.0%	23.0%	23.0%	23.0%		

Sources: CPW Planning. Table 101 for existing comparison goods floorspace.

Notes:

**Scenario 3**  
**Non-central stores in the Perth and Kinross area**

Table: **104**  
**CONVENIENCE GOODS MARKET SHARES IN 2026**

2026			
Non-central stores in the Perth and Kinross area			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	85.7	62.9	78.9
2	38.0	39.1	38.3
3	41.3	12.2	32.6
4	49.5	8.5	37.2
5	18.1	26.9	20.7

Sources: Household Interview Survey 2022.  
 Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **105**  
**COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2026**

2026 Allocations to									
Non-central stores in the Perth and Kinross area									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	1,043	302	119	145	583	183	659	478	3,512
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	14.7	23.7	59.6	69.6	70.4	79.7	19.7	21.5	33.8
2	4.2	14.9	34.2	20.9	25.1	23.4	1.2	9.8	11.5
3	5.0	12.8	41.5	43.4	50.0	40.6	5.5	9.7	18.6
4	6.7	28.0	58.4	84.3	76.2	65.8	8.5	5.9	28.3
5	0.5	2.0	24.6	7.9	11.1	18.2	3.2	7.9	5.9

Sources: Household Interview Survey 2022.  
 Table 4 for expenditure weights.

Table: 106

**MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA**

Scenario:	3	Location:	Non-central stores in the Perth and Kinross area									
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.												
Market shares correction factors:		Convenience Goods:						100 % of survey indicated figures				
		Comparison Goods:						100 % of survey indicated figures				
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS						
	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)	2026 (%)	2028 (%)	2033 (%)	2038 (%)	BLANK (%)		
1	79	79	79	79		34	34	34	34			
2	38	38	38	38		11	11	11	11			
3	33	33	33	33		19	19	19	19			
4	37	37	37	37		28	28	28	28			
5	21	21	21	21		6	6	6	6			

Sources: Tables 86 and 87.

Table: **107**  
**COMPARISON GOODS SALES BY GOODS TYPE IN**

**2026**

Catchment Zones	Sales in Non-central stores in the Perth and Kinross area							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	14,197	6,623	6,583	9,363	38,027	13,480	12,006	9,510
2	1,623	1,681	1,529	1,135	5,468	1,598	288	1,744
3	1,882	1,391	1,788	2,274	10,519	2,674	1,307	1,672
4	936	1,138	937	1,646	5,974	1,618	753	379
5	150	170	843	328	1,850	952	598	1,082
<b>TOTALS</b>	<b>18,787</b>	<b>11,003</b>	<b>11,680</b>	<b>14,746</b>	<b>61,838</b>	<b>20,322</b>	<b>14,952</b>	<b>14,387</b>
<b>MARKET SHARES</b>	<b>8.7%</b>	<b>17.5%</b>	<b>47.0%</b>	<b>48.8%</b>	<b>50.9%</b>	<b>53.4%</b>	<b>10.9%</b>	<b>14.5%</b>

Table: **108**  
**FORECAST RETAIL SALES**

Scenario:	3		Location: Non-central stores in the Perth and Kinross area							
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)	2026 (£000)	2028 (£000)	2033 (£000)	2038 (£000)	BLANK (£000)
1	207,087	205,795	203,809	202,162		107,981	111,397	124,568	139,570	
2	40,895	40,615	40,272	39,968		14,115	14,558	16,291	18,262	
3	33,166	32,979	33,175	33,334		23,516	24,356	27,574	31,295	
4	14,172	14,096	14,141	14,179		12,915	13,339	15,103	17,109	
5	17,367	17,226	17,065	16,933		5,900	6,077	6,798	7,616	
<b>TOTALS</b>	<b>312,687</b>	<b>310,712</b>	<b>308,462</b>	<b>306,576</b>		<b>164,428</b>	<b>169,726</b>	<b>190,334</b>	<b>213,852</b>	

Table: 109

**SALES CAPACITY OF EXISTING  
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2026

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Aldi (Broich Road - Crieff)	1,254	80	1,003	11,356	11,392
Aldi (Glasgow Road - Perth)	938	80	750	11,356	8,522
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,250	80	1,000	11,356	11,356
Asda (Dunkeld Road - Perth)	5,483	65	3,564	10,547	37,589
Iceland: The Food Warehouse (St Catherines Retail Park - Perth)	1,115	100	1,115	6,798	7,580
Lidl (Perth Road - Blairgowrie)	1,300	85	1,105	8,308	9,180
Lidl (Riggs Road - Perth)	1,126	85	957	8,308	7,952
M&S Foodhall (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,115	95	1,059	10,659	11,291
Morrisons (Caledonian Road - Perth)	3,476	85	2,955	10,379	30,666
Sainsbury's (Station Road - Kinross)	2,030	85	1,726	13,209	22,792
Tesco Extra (Crieff Road - Perth)	5,504	65	3,578	15,430	55,202
Tesco Superstore (Edinburgh Road - Perth)	3,710	75	2,783	15,430	42,934
Other (estimated) convenience goods shops and stores	7,500	95	7,125	8,996	64,094
<b>ALL STORES</b>	<b>35,801</b>		<b>28,719</b>	<b>11,162</b>	<b>320,549</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Table: 110

**SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE**

Store	Gross Firspe (sq m)	Net Firspe (sq m)	Sales Density (£per sqm net)	Sales (£000)
St Catherines Retail Park (St Catherines Road - Perth) (1)	18,010	15,604	5,246	81,858
Inveralmond Retail Park (Ruthvenfield Road - Perth)	3,800	3,420	4,896	16,745
Inveralmond Trade Park (Ruthvenfield Road - Perth) (2)	1,600	1,224	4,663	5,708
<i>Solus retail warehouses:</i>				
B&Q (Crieff Road - Perth) (3)	5,806	3,484	1,982	6,904
B&M Store and Garden Centre (Broich Road - Crieff)	n/a	1,104	2,098	2,317
Home Bargains (Perth Road - Blairgowrie)	n/a	1,995	2,098	4,186
<i>Main foodstores - comparison goods floorspace:</i>				
Aldi (Broich Road - Crieff)	n/a	251	8,580	2,152
Aldi (Glasgow Road - Perth)	n/a	188	8,580	1,610
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	n/a	250	8,580	2,145
Asda (Dunkeld Road - Perth)	n/a	1,919	6,675	12,810
Lidl (Perth Road - Blairgowrie)	n/a	195	4,677	912
Lidl (Riggs Road - Perth)	n/a	169	4,677	790
Morrisons (Caledonian Road - Perth)	n/a	521	5,031	2,623
Sainsbury's (Station Road - Kinross)	n/a	305	8,677	2,642
Tesco Extra (Crieff Road - Perth)	n/a	1,926	9,018	17,372
Tesco Superstore (Edinburgh Road - Perth)	n/a	928	9,018	8,364
<b>TOTALS Trading at the date of the Household Interview Survey 2022</b>		<b>33,482</b>	<b>5,052</b>	<b>169,137</b>

Sources: Perth &amp; Kinross Town Centre and Retail Study 2016. Perth &amp; Kinross Council. CPW Planning. GlobalData 2024.

Notes:

- (1) Includes net sales area deduction for trade and/or non-retail sales associated with Halfords and Wickes.  
(2) Includes net sales area deduction for trade and/or non-retail sales associated with Screwfix and Toolstation.  
(3) 4,645 sq m net sales but 25% excluded for trade and/or non-retail sales.

Table: 111

**SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**

2026

<b>CONVENIENCE GOODS</b>					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	1,393	80	1,114	15,430	17,195
Proposed 'replacement' Aldi (Land west of 4 Pickembere, Perth) - application ref. 21/00248/FLL	377	80	302	11,356	3,425
<b>ALL STORES</b>	<b>1,770</b>		<b>1,416</b>		<b>20,620</b>
<b>COMPARISON GOODS</b>					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Proposed Tesco (Land off Bridge Road, Pitlochry) - application ref. 10/00666/FLM	2,586		279	9,018	2,516
Proposed additional retail (The House of Bruar, Blair Atholl, Pitlochry) - application ref. 23/01379/FL	1,461		1,461	6,000	8,766
<b>ALL STORES AND SCHEMES</b>	<b>4,047</b>		<b>1,740</b>		<b>11,282</b>

Sources: Perth &amp; Kinross Council. CPW Planning.

Notes: Proposed 'replacement' Aldi measures 1,315 sqm net but 377 sqm net accounting for the existing Aldi (938 sqm net) to be demolished and replaced.

Table: 112  
**FORECAST RETAIL CAPACITY**

Scenario: 3		Location: Non-central stores in the Perth and Kinross area									
Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2026				Comparison Goods:	2.00 % pa		2026 to		2038
	CONVENIENCE GOODS				BLANK	COMPARISON GOODS				BLANK	
	2026	2028	2033	2038		2026	2028	2033	2038		
Residents' Spending £000	312,687	310,712	308,462	306,576		164,428	169,726	190,334	213,852		
Plus visitors' spending (%)	-	-	-	-		3.0	3.0	3.0	3.0		
Total spending (£000)	312,687	310,712	308,462	306,576		169,361	174,818	196,044	220,268		
Existing shop floorspace (sq m net)	28,719	28,719	28,719	28,719		33,482	33,482	33,482	33,482		
Sales per sq m net (£)	10,888	11,162	11,162	11,162		5,058	5,468	6,037	6,665		
Sales from extg flrspe (£000)	312,687	320,549	320,549	320,549		169,361	183,080	202,135	223,173		
Available spending to support new shops (£000)	0	-9,837	-12,087	-13,972		0	-8,262	-6,091	-2,906		
Less sales capacity of committed new floorspace (£000)	0	20,620	20,620	20,620		0	11,738	12,959	14,308		
Net available spending for new shops (£000)	0	-30,458	-32,707	-34,593		0	-19,999	-19,051	-17,214		
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,500	5,722	6,318	6,975		
Capacity for new shop flrspe (sq m net)	0	-2,648	-2,844	-3,008		0	-3,495	-3,015	-2,468		
Market Share of Catchment Area Expenditure	52.9%	52.9%	52.8%	52.8%		23.0%	23.0%	23.0%	23.0%		

Sources: CPW Planning. Table 110 for existing comparison goods floorspace.

Notes: