Proposed Sedgefield Checkers Shopping Centre: Market Potential Report

August 2025

Lightstone

We simplify the complex

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1 Executive Summary

Site Evaluation

The proposed shopping centre in Sedgefield could provide the surrounding residents with an additional attractive shopping option with greater variety as to what is currently available in the area. The introduction of this shopping centre, if tenanted correctly, could help retain a further amount of the retail spend within the area by meeting the needs of the surrounding residents.

The site is deemed a good site as the site has good access, visibility and interception.

Market Potential

Propensities to shop and spend at the centre were estimated by product category based on both the existing and planned retail within the delineated catchment area.

The study indicates that the proposed Sedgefield Shopping Centre, using current and norm trading densities for a centre of this nature*, **warrants approximately 3 500m² to 4 000² GLA between 2027 and 2030. The proposed centre should achieve a turnover of approximately R144 million in 2027 and R162 million in 2030 (at constant 2025 money values).**

Lightstone is of the opinion that there is potential for a Checkers supermarket to open in the town, however this will definitely impact the two main supermarkets, Pick n Pay and Superspar by at least 25%. There are some gaps in the market that represent an opportunity for a new shopping centre to cover. **An additional supermarket of about 2 000m² GLA is warranted in the town.**

Based on IPD trading density information – please see detailed trading densities per product category in the appendix.

2 Research Background and Methodology

Lightstone was approached to evaluate the potential for the proposed Sedgefield Shopping Centre in Sedgefield.

The site is located at the intersection of intersection of Egret Street and Service Road, to the north of the Main Road/N2 in Sedgefield. A convenience shopping centre of approximately 4 000m² is envisaged with a Checkers Small as the sole supermarket anchor. A feasibility study for the proposed Checkers Small was conducted in 2023. This is a green fields site.

Desk research was required to determine the market potential and warranted space for the proposed shopping centre, taking into consideration the current and future retail environment in which the centre will operate, as well as the future development of the surrounding area.

In order to meet the objectives of the research the following modules were conducted:

Local Authority Survey and Overview of Development in the Area

Appropriate authorities in the council were consulted to establish up to date information on developments underway as well as future planned development within the area. This survey focused on three major areas: residential, commercial (office, industrial and retail developments) as well as road and transport infrastructure changes in the area.

Market Modelling

A catchment area for the site was delineated. The catchment area delineation takes into account traffic routes, driving times, physical and perceptual barriers, competitive facilities and mobility and demographics of the population. Catchment areas are a function of the type and size of the commercial node, and several assumptions were made in this regard.

Desk Research

The development potential for the proposed shopping centre was estimated using a computer simulation model. The model was run by Life Plane for each catchment area delineated. The data used to calculate the market potentials was sourced from secondary sources of information to provide details on population

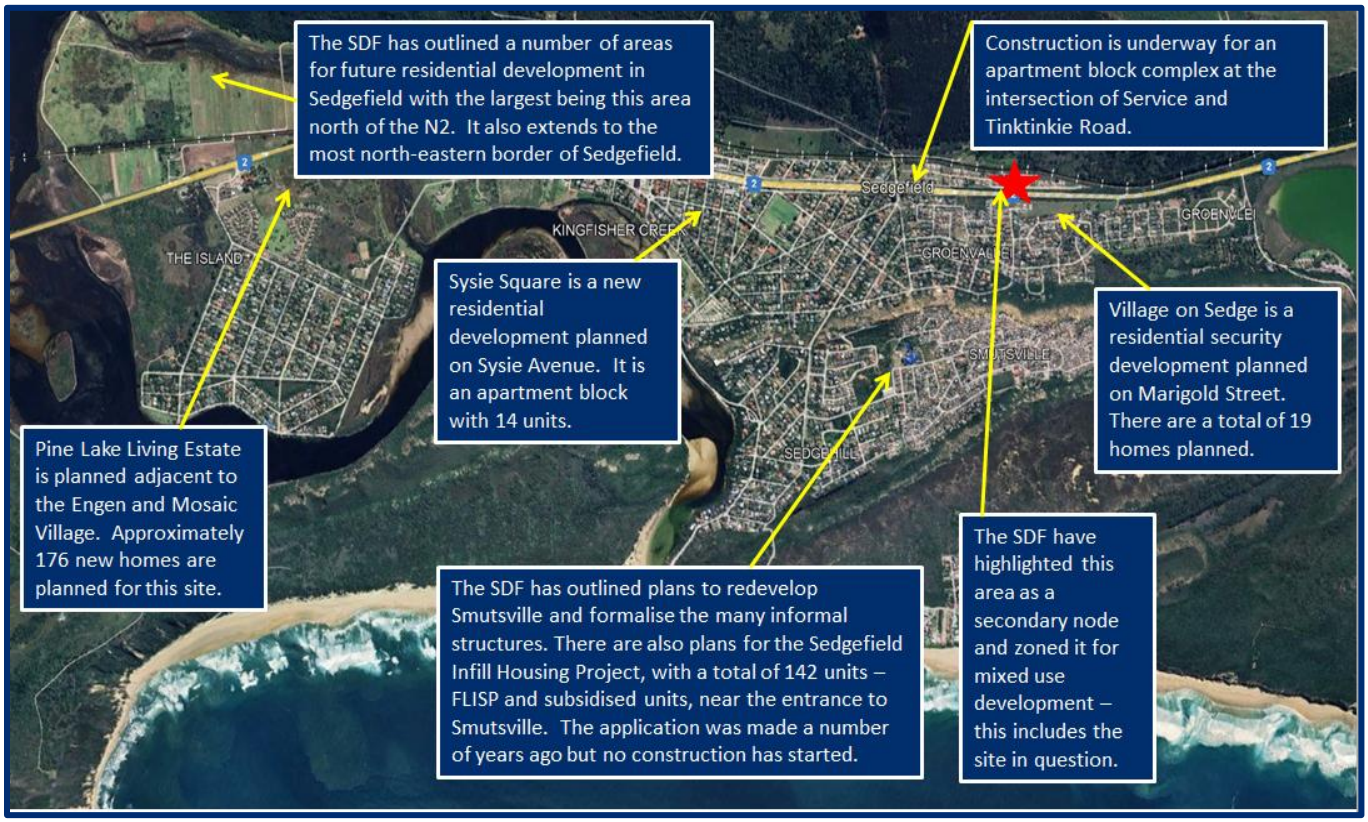
numbers, growth rates and income and expenditure patterns. Sources included Stats SA, Lightstone (Footprint), BMR and other bodies.

The model was generated to calculate the potential for the intended development and to highlight the 'support' required from each market segment or catchment area. Expected turnover and warranted floor space was modeled for 2027 and 2030.



View of Current Site

3 Local Authority Study



4 Catchment Area Delineation

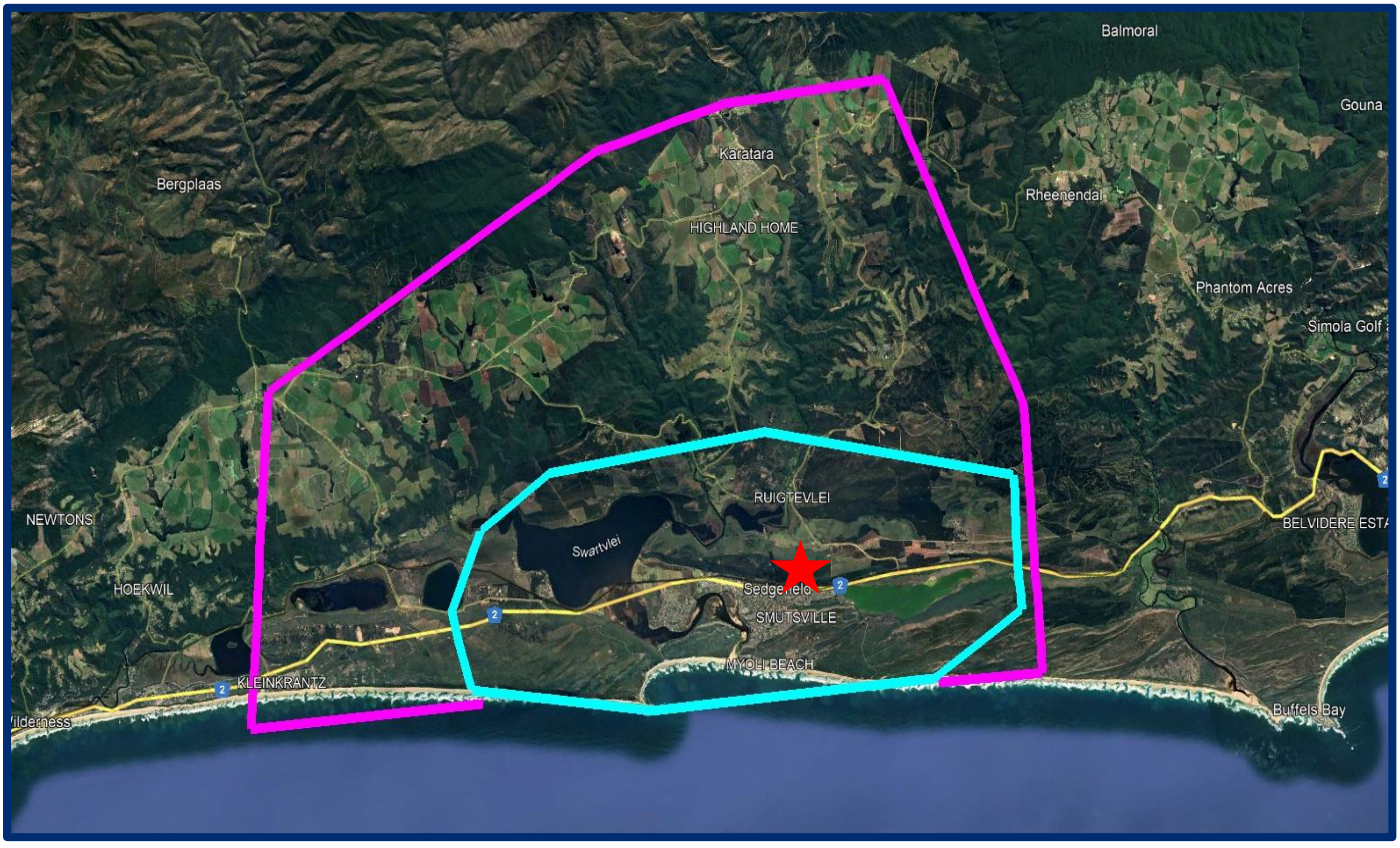
Catchment areas were delineated to derive a shopping population for the proposed shopping centre in Sedgefield. The primary catchment area extends approximately 2 - 10 kilometres around the site. The secondary catchment extends a further 6 - 9kms to the north and west primarily.

An inflow/transient component has been taken into account in the modelling to ensure the inclusion of commuters travelling on the N2 as well as holiday makers to the area.

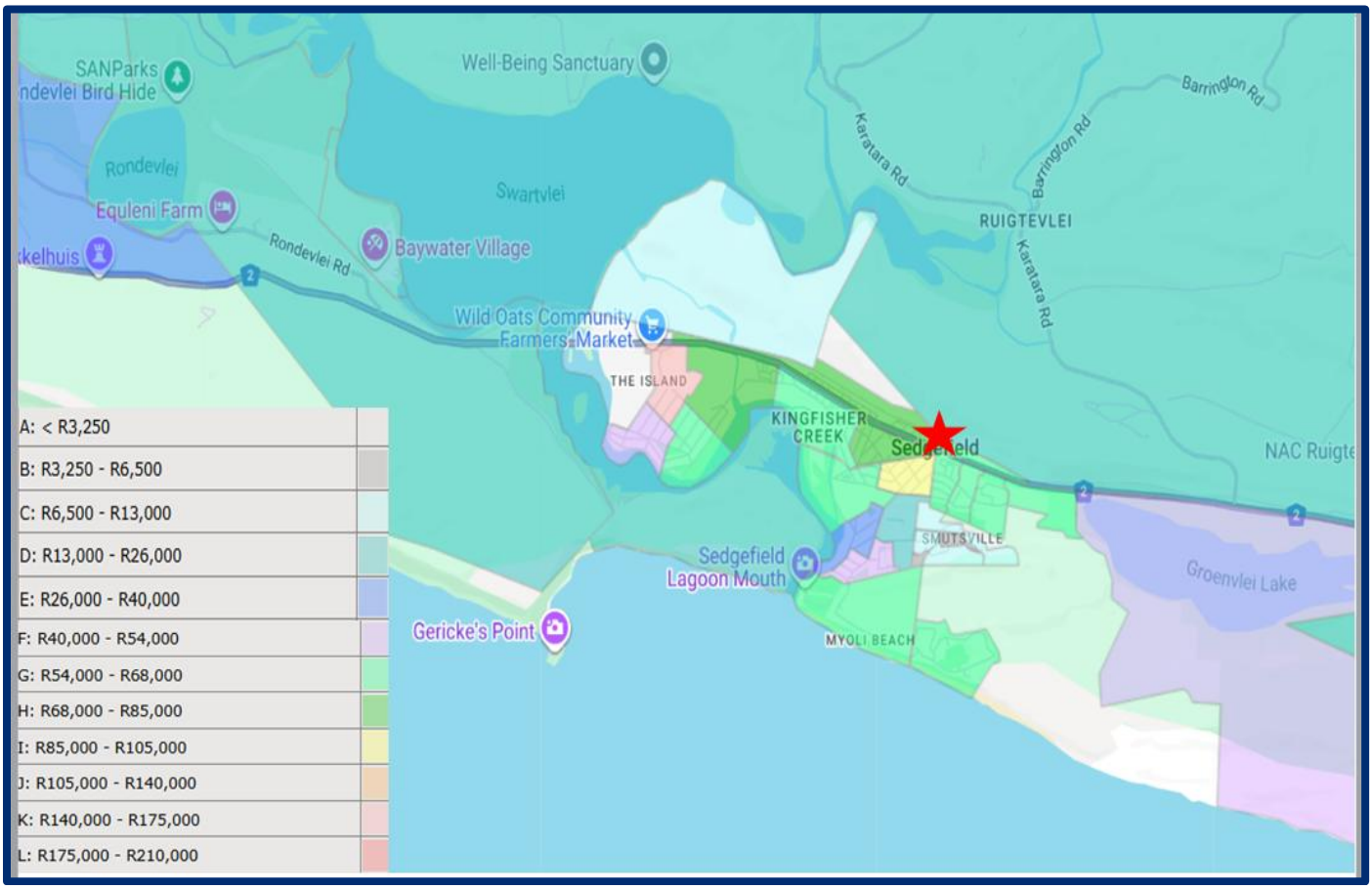
The Lightstone Life Plane Concept classifies Life Planes as follows:

- AB : Top Income Group (People with tertiary education beyond matric)
- CD: Middle Income Group (People with Grades 10, 11 and 12)
- EF: Lower Income Group (People with education levels below Grade 10)

Please note that there has been a slight adjustment to the catchments from the previous study conducted in 2023, particularly the western border of the secondary catchment.



5 Demographics: Income Distribution of the Surrounding Area



The majority of the residents of the catchment are middle to upper middle income in profile. The future residential developments noted in the area are planned to be aimed at a similar income profile as the current residents.

6 Retail Census

A census of retail outlets within surrounding areas was conducted in August 2025. All retail and service outlets were measured and recorded in order to determine the existing retail infrastructure of the study area by product category. This information is necessary to estimate the 'supply' side of the market as it exists at present.

The total retail space indicated for the delineated study area includes all retailers both national and independent within the defined study area.

Product category definitions are as follows (as used by Lightstone in this report):

- Food and Groceries includes all food and groceries, butcheries, bakeries, cafes and take-away foods.
- Clothing and Accessories includes all clothing, footwear, all fashion accessories, handbags, textiles, household linen etc.
- Furniture and Appliances includes furniture, antiques, large and small appliances.
- Other Retail Goods includes all other goods, such as toys, stationery, pharmacy, liquor, luggage, jewellery, hardware, florist etc.
- Consumer Services includes personal services (hairdresser, beauty salon, shoe repair etc.), financial services (banks, insurance, estate agents, etc.) and recreation and entertainment (cinemas, restaurants etc.)

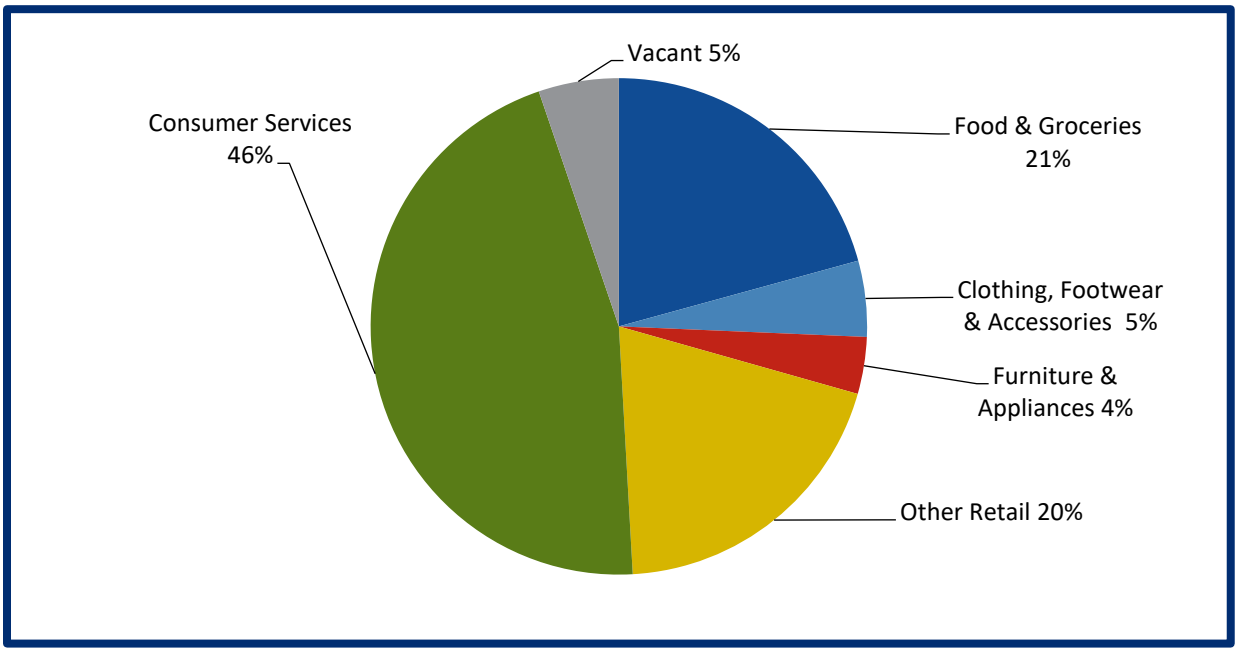
In total, some 192 formal stores and service outlets were recorded in the defined study area. The total amount of formal retail space is estimated at around 36 000m² (GLA). The largest proportion of the total space for the defined study area is attributed to "Other Retail Goods", followed by 'Food and Groceries'.

The majority of the stores were independent stores (over 80%), with under 20% of the stores recorded being nationally branded stores. The majority of the nationally branded stores fell within the Consumer Services product category and were predominantly of the national banks ATMS or national branded Estate Agencies. Most of the stores were located on the southern side of the N2 in a strip mall style fashion. The two larger shopping centres are the Pick n Pay and Superspar Centres.

A summary table, on the following page, shows the results by product category.

	Total		
	Gross M²	% of Space	No. of Stores
Food and Groceries	7 449	21%	28
Clothing, Footwear and Accessories	1 776	5%	13
Furniture and Appliances	1 332	4%	9
All Other Retail Goods	7 085	20%	46
Consumer Services	16 404	46%	88
Vacant	1 878	5%	8
TOTAL	**35 924**	**100%**	**192**

Product Category by Percentage



There is a fairly good product category mix offered in the town with most of the areas represented, with the exception of Furniture stores, which were under-represented and Clothing, Footwear and Accessories which was light on representation. The majority of the retail on offer was aimed at the middle to upper middle market and holiday makers.

6.1 Food and Groceries

'Food and Grocery' stores account for the second largest amount of retail space, 21%, measured in the delineated study area with a total of approximately 7 450m² GLA. The majority of the food and grocery space is attributable to Supermarkets and Superettes. The larger share of this section was made up of the Pick 'n Pay and Superspar. Approximately one third of the stores in this product category had national brand representation which included Superspar, Pick n Pay, Engen Quick Shop, Bonjour Café, Shell Select, Oasis Water, Steers and Vida e Cafe. There were a number of specialist stores, including a biltong store, ice-cream store, water bar, bakeries, butchery, fish shop, frozen foods and delicatessens.

There is definitely an opportunity to introduce additional nationally branded take away outlets into the town.

The table below shows the amount of space allocated to each type of food store.

	Gross M²	Total % of Space	No. of Stores
Supermarkets, Superettes	5 381	72%	9
Cafes & Forecourts	479	6%	3
Take Aways	645	9%	6
Specialist Stores	944	13%	10
Total Food and Groceries	**7 449**	**100%**	**28**

6.2 Clothing, Footwear and Accessories

This product category was the second smallest category in terms of space allocation at 5% of the total retail space in the area, measuring approximately 1 775m². The only nationally branded clothing stores in the town are Pick n Pay Clothing and Pep. There were a number of alternative clothing stores as well as leather clothing and shoes.

The majority of the clothing stores were aimed at the middle and upper middle income profiled customers as well as holiday makers. There were also two second hand clothing stores recorded.

There is an opportunity to introduce another nationally branded store that offers a range of clothing that caters to the whole family (including men's and children's clothing) as well as a dedicated shoe store.

	Gross M²	Total % of Space	No. of Stores
Menswear, Ladies, Children	1080	61%	8
Specialist stores	513	29%	4
Shoe stores	183	10%	1
Total Clothing, Footwear & Accessories	**1776**	**100%**	**13**

6.3 Furniture and Appliances

This was the smallest product category with only 4% of the total retail space recorded. There was a total of about 1 330m² and nine stores. The furniture specific outlets are not the traditional furniture stores, they are somewhat specialist furniture stores including cabinet specialists and a number of wood furniture stores. The specialist stores included second hand furniture stores and curtaining.

	Gross M²	Total % of Space	No. of Stores
Furniture stores	591	44%	3
Specialist stores	413	31%	2
Sound System stores	328	25%	4
Total Furniture & Appliance	**1 332**	**100%**	**9**

6.4 Other Retail Goods

'Other Retail Goods' was the third largest product category with about 7 100m² GLA, accounting for 20% of the total retail space. There was limited national brand representation in this category with the brands on offer including Tops, Pick n Pay Liquor, Liquorland, Build It, Clicks and Crazy Store. There was a good mix of stores on offer within this product category with strong representation on the art (inclusive of crafts), liquor and nursery related outlets. .

The table below highlights the amount of space allocated to each type of Other Retail Goods stores.

	Gross M²	% of Space	No. of Stores
Hardware and Building materials	2518	36%	8
Motor Vehicles and Equipment	302	4%	2
Books, Liquor, Florist, Pharmacy, Cosmetics	2262	32%	20
Sports Equipment, Phones, Cameras, Jewellery	122	2%	1
Nursery, Gifts, General Dealer, Toys, Housewares	1 882	27%	15
Total Other Goods	**7 086**	**100%**	**46**

6.5 Consumer Services

'Consumer Services' account for the largest amount of retail space recorded. About 16 400m² GLA was recorded, representing 46% of the total retail space. There was good representation across all of the sub-categories of this product category. Most of this space was represented in the Entertainment Services, which was represented by over 21 restaurants/coffee shops. There were 11 estate agents/ rental agents recorded which contributes to the majority of the Financial Services sub-category.

	Gross M²	Total % of Space	No. of Stores
Entertainment Serv.	7147	44%	24
Financial Services	2395	15%	24
Medical Services	1919	12%	14
Personal Services	3065	19%	17
Repair Services	1878	11%	9
Total Services	**16404**	**100%**	**88**

There were approximately 10 vacant stores noted in the town which represents about 5% of the total space recorded. Approximately 4 of these were in the Eyethu Centre in Smutsville and the remainder in the CBD of the town.

Photos of some of the Retail in the Greater Area

Figure 1: Pick n Pay Centre



Figure 2: Superspar Centre



Figure 3: Mosaic Village, just outside of Sedgefield



7 SWOT Analysis

Strengths	Weaknesses
• Good visibility, accessibility, and interception for those living in the town and those travelling on the N2 • The site has good access from the N2 • The extent of the site allows for an appropriately sized and viable centre • The area around the site is well-maintained and the majority of the town's residents fit the target market profile	• The site is outside of the main retail precinct
Opportunities	**Threats**
There is an opportunity to introduce a new attractive, convenient shopping centre, with some nationally branded tenants that can meet the retail needs of the residents of the surrounding areas and fill the current gaps in the market	• Competition is strong

This site is deemed a good site and is above average in its rating.

Site Evaluation Table

SITE ANALYSIS	EVALUATION RATING GUIDELINES	RATING
1. Type of development	Local or Convenience Centre	3
2. Precinct appropriateness	Fair area	5
3. Market Centrality	Between 50% - 60%	4
4. Proximity to Core Precinct	Free-standing Centre	3
5.Dominance	Has a slight edge over competitors	6
6. Strength of Competition	Competition is strong	4
7. Shape of the site	Polygon shape	5
8. Size of the site	Generous	6
9. Amount of parking	Good & reasonable	6
10. Quality of the environment	Established, well maintained	6
11. Market Compatibility	Mainly Target Market	6
12. Level of Security	Good Security	7
13.Proximity to public transport	Over 300m	3
14.Volume of pedestrian traffic	Poor	3
15. Volume of vehicular traffic	Good	6
16. Topography	Flat site, but whole area flat	6
Total Site Rating	**Weighted Score**	**54**
SECTORAL ANALYSIS		
1. Visibility from each sector	Excellent from most approaches	7
2. Interception from each sector	On main route between home and other facilities	7
3. Centrality within key sectors	Skewed to the one side of the main sector	5
4. Vehicular Access	Good road, few stops, good access	6
5. Driving Access Time (average)	Approximately 10 - 15 minutes	3
6. Walking Access time (average)	Not applicable	4
9. Market Profile	Upper middle market, BC	7
Total Sector rating	**Weighted score**	**59**
TOTAL OVERALL WEIGHTED SITE EVALUATION SCORE		**56**

Site Evaluation Ratings Guidelines	
45	Slightly below average site.
49	So so site, only slightly above average rating.
51	Reasonable site - only slightly above average rating. Adequate market potential essential.
55	Good site, above average rating.
60	Very good site, comfortably above average rating.
65	Outstanding site, well above average rating.

Site Photos

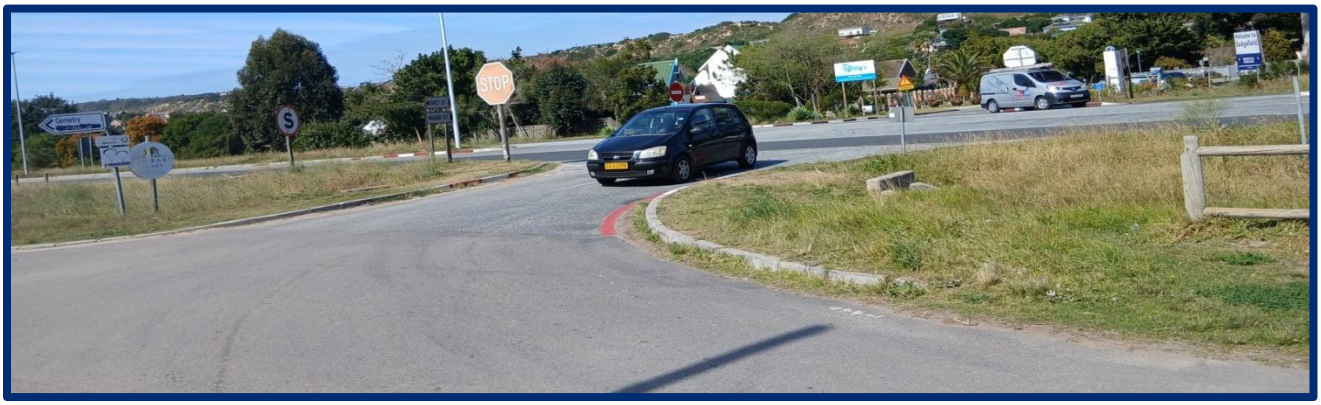
Figure 1: From Egret Street, off the N2, north-east direction



Figure 2: From Service Road, looking eastwards



Figure 3: From the site looking east towards the N2



8 Final Model Results

The below details the numeric flow within the model from shopping population and total retail potential through to centre turnover potential and warranted space. The final model output estimates that the centre will achieve an annual turnover of approximately R162 million (in 2025 monetary values) in 2030 with a warranted size of approximately 4 000m². These figures assume that the centre is optimally tenanted to suit the surrounding resident's needs and addresses the gaps in the market.

Details	2025	2027*	2030*
Shopping Population	22 298	22 792	24 120
Total Retail Market Potential (Rm)	1 005	1 066	1 190
Centre Market Potential (Rm)			
• Food and Groceries	110	117	131
• Clothing and Accessories	11	11	13
• Furniture and Appliances	0	0	0
• Other Retail Goods	8	9	11
• Consumer Services	6	7	8
Total Market Potential	**135**	**144**	**162**
Warranted Space (Estimated m² GLA) for the proposed centre			
• Food and Groceries	1 833	1 917	2 177
• Clothing and Accessories	420	439	504
• Furniture and Appliances	0	0	0
• Other Retail Goods	423	442	549
• Consumer Services	320	335	394
Development Potential for the specified site	**2 996**	**3 133**	**3 624**

Please note:

- All forecast figures are in current 2025 Rand values i.e., exclude Inflation.

The above market potential estimates assume no other supermarkets or shopping centres are developed in the surrounding area over the forecast period other than those mentioned. Please note that actual propensities to shop and spend at the centre will be dependent on how the centre is developed and the final tenant mix achieved.

9 Tenant Mix Recommendations

A recommended schedule of tenants for the proposed Sedgefield Shopping Centre is listed by product category, based on Lightstone's evaluation of the area and knowledge of suitable tenant mixes for similar types of centres as well as what type of store and brand of stores are already represented in the area. This list is based largely on what we think should be there to provide a viable and balanced tenant mix and has made use of our expertise and previous experience in this regard. The 2030 warranted space has been used for this exercise.

We believe that the tenant mix focus needs to be offering a mix of national brands and attractive independents that are aimed primarily at the middle to upper-middle income residents of the delineated catchment areas.

9.1 Food and Groceries

In the 'Food and Groceries' category we recommend and support a Checkers supermarket and some nationally branded take away outlets.

Food & Groceries	***Tenants Recommended***
M²	
2 000m²	**Checkers**
90m²	***Steers***
85m²	***Debonairs***

9.2 Clothing, Footwear and Accessories

Given the size of the centre and the nature of the town's residents and visitors we recommend a Mr Price store as well as a shoe and sports store.

Clothing, Footwear & Accessories	*Tenants Recommended*
M²	
230m²	Mr Price Clothing
175m²	Mr Price Sports Store
100m²	Rage Shoes

9.3 Furniture and Appliances

Given the size and character of the centre, we believe that a good tenant and product category balance can be achieved without representation from this product category. A bed and mattress store could potentially work in this centre adding some further bulk if required.

9.4 Other Goods

In the 'Other Goods' category we support the following stores as they provide a well-balanced tenant mix for this product category. We would strongly recommend nationally branded tenants where possible. .

Other Goods	*Tenants Recommended*
M²	
240m²	*Checkers Outdoor*
190m²	*Checkers Liquor*
60m²	*Cosmetics & Perfume*
60m²	*Vape Store*

9.5 Consumer Services

We would recommend the following services as a well-balanced mix. The aim would be to provide services that are currently not offered in the area, or those that do not have a strong representation.

Consumer Services	*Tenants Recommended*
M²	
200m²	*Full Bank: FNB or ABSA*
70m²	*Cell repairs*
60m²	*Key Cutting & Shoe Repairs*
60m²	*Vape Store*
2-4m²	*ATMs: ABSA / FNB / Nedbank*

10 Appendix: Model Details

2027 Model

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Population	4 300	4 765	3 873	336	1 628	702	24 155	39 760
Per Capita Income R/Pa	392 270	86 420	43 810	580 760	187 840	63 890	230 370	210 734
Propensity to Shop in the Area %	100	100	100	80	70	65	33	57
Shopping Population	4 300	4 765	3 873	269	1 139	456	7 971	22 775
Source of Shoppers %	18,9%	20,9%	17,0%	1,2%	5,0%	2,0%	35,0%	100%
Expenditure % of Income								
▪ Food & Groceries	11,7	25,0	34,0	8,6	16,5	29,0	15,0	10,5
▪ Clothing & Accessories	3,6	5,2	6,3	3,1	3,9	5,5	3,9	2,7
▪ Furniture & Appliances	4,0	3,8	3,7	3,5	4,6	3,6	4,4	2,8
▪ Other Retail Goods	4,3	5,6	6,5	3,8	5,0	6,0	4,8	3,2
▪ Consumer Services	4,1	4,8	5,0	3,6	4,7	4,7	4,5	2,9
Total Expenditure % of Income	27,6	44,3	55,5	22,6	34,6	48,9	32,6	22,2
Per Capita Expenditure R/Pa								
▪ Food & Groceries	45 699	21 605	14 895	49 945	30 994	18 528	34 556	22 185
▪ Clothing & Accessories	14 057	4 451	2 760	18 268	7 382	3 514	8 915	5 740
▪ Furniture & Appliances	15 626	3 284	1 612	20 308	8 610	2 313	10 247	5 812
▪ Other Retail Goods	16 875	4 840	2 848	21 931	9 298	3 833	11 066	6 762
▪ Consumer Services	15 888	4 131	2 191	20 648	8 754	3 022	10 418	6 182
Total Per Capita Expenditure R/Pa	108 145	38 310	24 306	131 100	65 038	31 210	75 202	46 682
Total Market Potential R'm								
▪ Food & Groceries	197	103	58	13	35	8	91	505
▪ Clothing & Accessories	60	21	11	5	8	2	23	131
▪ Furniture & Appliances	67	16	6	5	10	1	27	132
▪ Other Retail Goods	73	23	11	6	11	2	29	154
▪ Consumer Services	68	20	8	6	10	1	27	141
Total Market Potential R'm	465	183	94	35	74	14	198	1 063

2027 Model Continued

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Propensity to Spend in the Area%								
▪ Food & Groceries	90	100	100	75	65	50	25	79
▪ Clothing & Accessories	30	65	85	10	25	20	2	34
▪ Furniture & Appliances	8	20	50	1	1	0	1	9
▪ Other Retail Goods	60	33	33	45	40	35	15	43
▪ Consumer Services	60	75	90	45	40	35	35	57
Total Retail Expenditure	61	78	86	45	45	40	19	56
Area Market Potential R'm								
▪ Food & Groceries	177	103	58	10	23	4	23	397
▪ Clothing & Accessories	18	14	9	0	2	0	0	44
▪ Furniture & Appliances	5	3	3	0	0	0	0	12
▪ Other Retail Goods	44	8	4	3	4	1	4	67
▪ Consumer Services	41	15	8	2	4	0	10	80
Total Retail Expenditure	285	142	81	16	33	6	37	601
Propensity to Spend at the Centre%								
▪ Food & Groceries	38	20	20	40	20	15	35	29
▪ Clothing & Accessories	35	20	15	35	20	15	30	25
▪ Furniture & Appliances	0	0	0	0	0	0	0	0
▪ Other Retail Goods	15	10	5	15	10	5	15	13
▪ Consumer Services	12	5	2	12	5	2	5	9
Total Retail Expenditure	30	17	16	31	17	13	25	24
Centre Market Potential R'm								
▪ Food & Groceries	67	21	12	4	5	1	8	117
▪ Clothing & Accessories	6	3	1	0	0	0	0	11
▪ Furniture & Appliances	0	0	0	0	0	0	0	0
▪ Other Retail Goods	7	1	0	0	0	0	1	9
▪ Consumer Services	5	1	0	0	0	0	0	7
Total Retail Expenditure	85	25	13	5	6	1	9	144

2027 Model Continued

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Trading Densities R/M²								
▪ Food & Groceries								60 960
▪ Clothing & Accessories								25 650
▪ Furniture & Appliances								8 640
▪ Other Retail Goods								20 320
▪ Consumer Services								20 320
Overall Trading Density R/M²								45 915
Warranted Floor Space - GLA M²								
▪ Food & Groceries	1 103	338	189	66	75	10	130	1 912
▪ Clothing & Accessories	247	107	53	7	16	2	5	439
▪ Furniture & Appliances	0	0	0	0	0	0	0	0
▪ Other Retail Goods	321	37	9	20	21	2	32	442
▪ Consumer Services	242	36	8	15	10	0	24	335
Warranted Space GLA M²	**1 914**	**519**	**259**	**107**	**122**	**14**	**192**	**3 127**

2030 Model

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Population	4 978	4 873	3 932	336	1 647	708	25 562	42 037
Per Capita Income R/Pa	410 950	92 220	47 180	608 410	200 440	68 800	245 070	226 672
Propensity to Shop in the Area %	100	100	100	80	70	65	33	57
Shopping Population	4 978	4 873	3 932	269	1 153	460	8 435	24 101
Source of Shoppers %	20,6%	20,2%	16,3%	1,1%	4,8%	1,9%	35,0%	100%
Expenditure % of Income								
▪ Food & Groceries	11,3	24,0	33,0	8,1	15,8	27,0	14,3	10,2
▪ Clothing & Accessories	3,5	5,0	6,0	3,1	3,9	5,3	3,8	2,7
▪ Furniture & Appliances	3,9	3,9	3,6	3,4	4,5	3,6	4,4	2,8
▪ Other Retail Goods	4,2	5,5	6,3	3,7	4,9	5,9	4,7	3,2
▪ Consumer Services	4,0	4,8	4,8	3,5	4,6	4,7	4,5	2,9
Total Expenditure % of Income	26,9	43,2	53,7	21,7	33,6	46,5	31,7	21,7
Per Capita Expenditure R/Pa								
▪ Food & Groceries	46 232	22 133	15 569	49 281	31 569	18 576	34 922	23 013
▪ Clothing & Accessories	14 434	4 611	2 831	18 664	7 817	3 646	9 411	6 114
▪ Furniture & Appliances	16 046	3 597	1 717	20 748	9 051	2 484	10 738	6 274
▪ Other Retail Goods	17 328	5 072	2 949	22 407	9 774	4 059	11 596	7 220
▪ Consumer Services	16 314	4 445	2 265	21 095	9 202	3 234	10 918	6 636
Total Per Capita Expenditure R/Pa	110 353	39 857	25 331	132 195	67 413	31 999	77 585	49 258
Total Market Potential R'm								
▪ Food & Groceries	230	108	61	13	36	9	97	555
▪ Clothing & Accessories	72	22	11	5	9	2	26	147
▪ Furniture & Appliances	80	18	7	6	10	1	30	151
▪ Other Retail Goods	86	25	12	6	11	2	32	174
▪ Consumer Services	81	22	9	6	11	1	30	160
Total Market Potential R'm	549	194	100	36	78	15	216	1 187

2030 Model Continued

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Propensity to Spend in the Area%								
▪ Food & Groceries	90	100	100	75	65	50	25	79
▪ Clothing & Accessories	30	65	85	10	25	20	2	33
▪ Furniture & Appliances	8	20	50	1	1	0	1	9
▪ Other Retail Goods	60	33	33	45	40	35	15	44
▪ Consumer Services	60	75	90	45	40	35	35	57
Total Retail Expenditure	61	77	86	44	45	39	19	56
Area Market Potential R'm								
▪ Food & Groceries	207	108	61	10	24	4	24	438
▪ Clothing & Accessories	22	15	9	1	2	0	1	49
▪ Furniture & Appliances	6	4	3	0	0	0	0	14
▪ Other Retail Goods	52	8	4	3	5	1	5	76
▪ Consumer Services	49	16	8	3	4	1	11	91
Total Retail Expenditure	336	150	86	16	35	6	41	669
Propensity to Spend at the Centre%								
▪ Food & Groceries	38	20	20	40	20	15	36	30
▪ Clothing & Accessories	35	20	15	35	20	15	30	26
▪ Furniture & Appliances	0	0	0	0	0	0	0	0
▪ Other Retail Goods	16	10	5	16	10	5	16	14
▪ Consumer Services	12	5	2	12	5	2	5	9
Total Retail Expenditure	30	17	16	31	17	13	25	24
Centre Market Potential R'm								
▪ Food & Groceries	78,7	21,6	12,2	4,0	4,7	0,6	8,7	131
▪ Clothing & Accessories	7,5	2,9	1,4	0,2	0,5	0,1	0,2	13
▪ Furniture & Appliances	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0
▪ Other Retail Goods	8,3	0,8	0,2	0,4	0,5	0,0	0,8	11
▪ Consumer Services	5,8	0,8	0,2	0,3	0,2	0,0	0,5	8
Total Retail Expenditure	100,39	26,12	14,01	4,89	5,85	0,73	10,21	162

2030 Model Continued

Details	Primary Catchment Area			Secondary Catchment Area			Transient	Total Market
	AB	CD	EF	AB	CD	EF		
Trading Densities R/M²								
▪ Food & Groceries								60 000
▪ Clothing & Accessories								25 250
▪ Furniture & Appliances								8 500
▪ Other Retail Goods								20 000
▪ Consumer Services								20 000
Overall Trading Density R/M²								44 760
Warranted Floor Space - GLA M²								
▪ Food & Groceries	1 312	360	204	66	79	11	146	2 177
▪ Clothing & Accessories	299	116	56	7	18	2	6	504
▪ Furniture & Appliances	0	0	0	0	0	0	0	0
▪ Other Retail Goods	414	41	10	22	23	2	39	549
▪ Consumer Services	292	41	8	15	11	1	27	394
Warranted Space GLA M²	**2 317**	**557**	**278**	**110**	**130**	**15**	**217**	**3 624**

11 Summary

The detailed market potential study indicates that an additional shopping centre is warranted in the town of Sedgefield. The proposed Sedgefield Shopping Centre, planned to measure approximately 4000m², is supported by the results of this study. A Checkers Small store as supermarket anchor is recommended.