

OBSERVATORY OF COMMERCE

Analysis of the urban planning permits for retail businesses and hotels in 2019 - Development in the RLUP areas

EXECUTIVE SUMMARY APRIL 2022

The entire publication can be downloaded at the following address:

FR/NL: https://perspective.brussels/sites/default/files/bbp_obscom_fr-nl_2022.pdf

The purpose of this study by the Observatory of Commerce is to analyse the urban planning permits (UPPs) granted to retail businesses and hotels in 2019. This analysis shows the changes in the commercial structure, and more specifically the positive balance of its stock (overall increase of 20 000 m² of floor area). Separately, the hotel and commercial functions each showed an increase of 10 000 m² of floor area over the year under review. However, there was a decrease of 38 000 m² for the commercial function, which was ultimately offset by an increase of more than 48 000 m². The hotel, for its part, is generally experiencing a positive dynamic: gain of 12,000 m² against only 1,700 m² lost.

In terms of geography in the BCR, the commercial function shows some stability within the Pentagon and in certain "commercial core borders", as formulated by the Regional Land Use Plan (RLUP). However, there was a growing trend towards establishing commercial offering outside the commercial zones. Among the figures' revelations are that trade stock saw an overall negative balance for the commercial core with a loss of 8 000 m² of floor space. In contrast, the zones outside these borders are seeing an increase of 18 000 m² of net floor space. Examples are the new administrative complex with commercial functions on Boulevard Pacheco, the transformation of the old warehouses near Tour & Taxis, and a new retail park near Reyers. Private companies are the main actors and operators of these projects of commercial development.

This study observes a reorganisation of the commercial fabric and a search by private companies for new spaces and zones allowing large-scale commercial activities. Urban industrial areas in the periphery of the Region acknowledged a growth of 6 000 m² of retail, and "highly diverse zones" experienced an increase of 4 000 m². This changing geography of commerce confirms previous analyses by the Observatory of Commerce. These had already shown how difficult it is to keep certain commercial core borders active. It raises questions about the effectiveness of the RLUP borders of commercial core borders as a system created more than 20 years ago to concentrate trade in specific locations. These questions focus, for example, on regulatory and spatial constraints on floor space in dense urban areas.

These trends are usually accompanied by a dynamic of zoning changes, converting to other urban functions. As a result, competition between functions increases. Commerce often develops at the expense of production activities, while the disappearance of commerce benefits mainly housing.

The findings from this analysis of the UPPs pose a subject for discussion and prompt further investigation into the question of whether the current planning tools, particularly the RLUP in its current form, are sufficiently aligned to the trends in commercial and territorial development and the new relationships between urban functions.

