Charnwood Borough Council
Employment Land Review

Peter Brett Associates
With Aspinall Verdi
March 2018

33 Bowling Green Lane, Clerkenwell, London EC1R 0BJ
T: +44 (0)203 824 6600   E: london@peterbrett.com

Project Ref 39597

	Name	Position	Signature	Date
Prepared by	A. Lynch	Associate	AL	20/12/2017
Reviewed by	R. Pestell	Director	RP	22/12/2017
Approved by	C Howick	Partner	CH	26/03/18
For and on behalf of Peter Brett Associates LLP				

Revision	Date	Description	Prepared	Reviewed	Approved
1	19/01/18	Draft 2	AL	RP	
2	14/03/18	Draft 3	AL	RP	
3	26/03/18	Final	AL	RP	RP

THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING.

CONTENTS

APPENDICES

EXECUTIVE SUMMARY

1. This Employment Land Review (ELR) study provides an up-to-date employment evidence base to help inform the land allocations and planning policies in the new Local Plan.

2. The Study takes as its starting point the recent, January 2017, Housing and Economic Development Needs Assessment (HEDNA) for the Leicestershire Authorities.

3. The HEDNA provides a range of minimum employment targets for Charnwood which this report locally tests and refines.

4. For the office market we recommend the Council allocate a minimum of 17ha of new land which once completions between 2011-17 have been accounted for reduces to a minimum of 14ha.

5. We find that there is already sufficient supply in the pipeline, made up of allocations and outstanding permissions to meet this need. So no new land needs to be found.

6. For the industrial market the HENDA suggests that a minimum of 39ha of new land is needed for occupiers who demand units smaller than 9,000 sq m. We make a locally justified allowance for an additional 10ha to reflect the very low level of vacancy space in the market (below a 'healthy' level). This totals 49ha, but reduces to 44.5ha once completions (2011-17) are accounted for. As with offices; there is already sufficient land allocated to meet this need, with a slight surplus which should be used to provide some room for planned or windfall losses.

7. In addition, a minimum of 10ha of new land is needed to meet the needs of local firms seeking larger units (>9,000 sq m) over the plan period. This will require a new site to be allocated. This is needed because the HEDNA, when calculating the 39ha discussed above, excluded any large unit demand regardless of whether this is for local firms to Charnwood or footloose firms. 10ha is, in our view, the minimum size of site which provides flexibility to accommodate a small number of large units.

8. Finally; we make a policy recommendation about controlling loses in the next plan. All data suggests developing new space will remain challenging for the foreseeable future. Our site assessments also show that the stock of floor space is almost all well used. Without a new portfolio of built floor space (as opposed to allocated land) the Council cannot afford to release sites unless this release has been tested through market evidence.

9. In this report our quantitative analysis excludes the Science Park and Enterprise Zone. These are justified on their own merits and do not form part of the 'normal' land supply - as confirmed by the Inspector examining the last plan[1]. There is no suggestion these sites are released or de-allocated from the supply; even though they are in excess of the minimum land targets we have identified.

[1] Paragraph 178 of the 2015 IR.

1 INTRODUCTION

1.1 This report sets out the findings of an Employment Land Review (ELR) that aims to underpin the employment policies and site allocations in the new Local Plan, and to support future economic development in the Borough of Charnwood (the Borough).

1.2 Charnwood benefits from a recent, and NPPF compliant Local Plan adopted in November 2015. This plan covers the period 2011 – 2028, and so has around 10 years remaining. But a new Local Plan is needed so that the Council can maintain a robust supply of housing and employment land post 2028. The new Plan is expected to provide sufficient development land up to 2036.

1.3 This report provides the evidence base and makes recommendations about the scale and quality of new land needed to support the Borough's growth over this extended Plan period.

1.4 The study follows a method which will be familiar to many who engage with the plan making process. However, the estimate of the headline quantitative demand figures for new land in the Borough come from the recent (January 2017) Leicestershire Housing and Development Needs Assessment (HEDNA). The Leicestershire Councils are collectively committed, via a memorandum of understanding[2], to seek to implement the quantity of land recommended in that report.

1.5 For Charnwood in the period to 2036 the report recommended that the Borough seeks to accommodate between 56-79ha of new employment land (B classes).

Table 1.1 – Employment Land Needs (hectares) from the HEDNA

	2011-2031			2011-2036		
	B1a/b	B1c/B2	Small B8	B1a/b	B1c/B2	Small B8
Leicester	2-6	36	15	3-7	45	19
Blaby	37-45	15	10	47-48	19	12
Charnwood	14-37	21	11	17-40	26	13
Harborough	14-21	22	8	17-24	28	9
H&B	11-32	14	16	13-34	17	20
Melton	10-18	21	14	10-23	26	17
NWL	45-46	3	17	50-56	4	21
O&W	1	0	4	2	0	5
FEMA	**142-198**	**132**	**93**	**177-215**	**165**	**117**

Source: Table 83 HEDNA, GL Hearn 2016

1.6 In this report chapters 2 and 3 provide background information; a review of national policy and some key economic evidence. Chapter 4 sets out a detailed review of the property market; informed by extensive consultations and site assessments of the

[2] The Councils that are signed up to the MOU are: Blaby District Council; Charnwood Borough Council; Harborough District Council; Hinckley & Bosworth Borough Council; Leicester City Council; Leicester and Leicestershire Local Enterprise Partnership; Leicestershire County Council; Melton Borough Council; North West Leicestershire District Council; and Oadby and Wigston Borough Council.

existing stock and allocated sites. This analysis informs the following chapters and recommendations. The detailed site assessments are found in the appendix.

1.7 Our conclusions for new land for offices are set out in in chapter 5

1.8 Chapter 6 considers the need for industrial land. As per the HEDNA report this is split in the need for land to accommodate non-strategic industrial and warehouse units, defined as units <9,000 sq m and then the need for land to accommodate larger units (>9,000 sq m).

1.9 Chapter 7 presents conclusions and policy recommendations.

1.10 Finally, both the Borough and the Consultant team are grateful to all those who responded to our consultation requests, and especially the property market agents who provided their view of the market, and allowed us to benchmark our data and market understanding. We are especially thankful to those who attended the consultation event in December 2017.

2 PLANNING POLICY CONTEXT

Introduction

2.1 This section sets the policy context for the study, starting with the national context, and then how this may change in the short to medium term.

National policy and guidance

National Planning Policy Framework

2.2 In respect of economic development, as for all other land uses, the guiding principle is that Local Plans should positively seek opportunities to meet the development needs of their areas.

2.3 Key paragraphs from the Framework include:

- Planning should do all it can positively to support sustainable economic growth. It should not act as an impediment to such growth (paragraph 19).
- To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business (paragraph 20).
- Local Plans should inter alia (paragraph 21):
  - set out a clear economic vision and strategy for their area;
  - identify strategic sites, or set criteria to help identify other sites, for development in line with that strategy;
  - support existing business sectors and where possible plan for new or emerging sectors likely to locate in their area;
  - plan positively for clusters or networks of knowledge-driven, creative or high-technology industries;

2.4 In respect of sites allocated for employment use the Framework (paragraph 22) makes clear that:

- Planning policies should avoid long term protection where there is no reasonable prospect of a site being used for that purpose;
- Land allocations should be regularly reviewed;

2.5 Councils should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals (paragraph 158)

2.6 Local authorities should work strategically across local boundaries, and in particular:

- In building evidence bases, collaborate with neighbouring and county authorities and Local Enterprise Partnerships (paragraph 160)

- In policy-making, co-ordinate strategic priorities across boundaries and accommodate the needs of neighbouring authorities that do not have enough sustainable capacity in their own areas (paragraphs 179-180).

2.7 Local Plans should be supported by an evidence base that (paragraph 160/1):

- Assesses needs for land and floorspace, both quantitative and qualitative, for all foreseeable types of economic activity over the plan period;
- Reflects a clear understanding of business needs
- Is based on close work with the business community to understand their needs and also identify and address barriers to investment, including lack of housing, infrastructure or viability.

2.8 The Framework is clear that Local Plans should work proactively to identify and meet the development needs of businesses including business sectors likely to locate in the area. It is clear from this that business demand should be the major driver directing local strategy. Cooperation with the LEP is important in respect of developing the evidence base.

2.9 Allocations should be reviewed on a regular basis, and strategic needs (and storage and distribution comes into this category) should be considered across local boundaries.

2.10 Of relevance, particularly following the referendum decision to leave the European Union, is the Framework's advice to plan positively for growth and not to act to impede growth. Given that the effects of Brexit cannot be predicted with any level of assurance, and the timescales for any effect are also unknown, to prepare a 15-year Plan on the basis of a Brexit-led economic downturn would be contrary to the Framework.

Planning Practice Guidance

Geography

2.11 The government's Planning Practice Guidance (PPG) expands on the question of cross-boundary working, advising that authorities join forces with neighbours, in line with the Duty to Co-operate, so that assessments of development needs cover market areas that straddle local authority boundaries. 'This is because such needs are rarely constrained precisely by administrative boundaries.'

2.12 The Guidance states that local economies often overlap local administrative boundaries, but regional economies are too large to be helpful for individual boroughs, and states:

'The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial

factors used in analysing demand and supply – often referred to as the functional economic market area.'[3]

2.13 The PPG refers to a number of data sources that are key to identifying discrete economic areas, referred to as functional economic market areas (FEMAs), chief amongst them travel to work areas.

2.14 In this area, the Leicestershire HEDNA evidence provides a strategic framework across the County; including defining a County FEMA, and indicative share of employment space which balances with the quantum of new housing.

2.15 In relation to the planning evidence base, unlike for housing, the PPG does not set out a method for assessing future employment needs. The Guidance says that the purpose of an assessment of land availability is to identify a future supply of land which is suitable, available and achievable for economic development uses over the Plan period, but is not prescriptive as to how this should be achieved.

2.16 The Guidance states that evidence should estimate the future demand for land and floor space, based on projections or forecasts (including a projection of past trends); these forecasts should be both quantitative and qualitative and they should be broken down into sectors or market segments. It also lists other information that should be considered, including consultations.

2.17 Plan makers should consider forecast scenarios based on:

- Sectoral and employment forecasts and projections (labour demand);
- Demographically derived assessments of future employment needs (labour supply techniques);
- Analyses based on the past take-up of employment land and property and/or future property market requirements; and
- Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.

2.18 The Guidance refers to the need for Councils to make sure that the economic forecasts that they rely on account for the locally distinct employment conditions, which may differ from national economic trends.

Proposed Changes to National Guidance

2.19 Government is actively considering re-drafting key areas of national guidance including the NPPF, but also the PPG.

2.20 A key area of focus relates to housing numbers and the lack of clarity which Councils (and their consultants) calculate and promote their numbers. Since the NPPF was first published in 2012 many assessments, including those in Leicestershire, have been subject to an almost continual cycle of updating, revision and challenge. These challenges, as has previously happened in the County, have sometimes resulted in the High Court intervening at great expense. On occasion the High Court has found

[3] Paragraphs 8 and 12 of the PPG, 6th March 2014

Council evidence legally erroneous requiring extensive new evidence to repair the evidence base.

2.21 To remedy this the Government proposes to centrally direct Councils minimum housing number (the Objectively Assessed Housing Need or OAN) using a standardised formula.

2.22 Government consulted on a new method for calculating housing need in late 2017. A full draft of the relevant parts of Planning Practice Guidance was published in early March 2018. This new draft (March 2018) is not presented as a new consultation version, and so would appear to represent a reasonably settled Government view.

2.23 For this work, aside from directing minimum housing numbers, the Standardised Method 'decouples' jobs and housing evidence. This is because the current system, as prescribed in the Planning Practice Guidance, has proved not to be effective and has been overly complex. This 'decoupling' also reflects a concern with the current system, whereby when economic and housing evidence is 'integrated' (NPPF 158) it acts as an incentive not to aspire for economic growth, or (within reason) to allocate land for qualitative reasons that may be in addition to any quantitative need. This is for fear that this economic aspiration could be translated in the certainty of more housing land or the perceived lack of alignment renders the plan unsound.

2.24 The emerging proposal is that Councils will be able to promote two housing numbers – a minimum from the Standardised Method and an optional 'policy on' higher; which may, for example enable an aspirational job target. This higher number will not be subject to aggressive challenge because, being in excess of the minimum, the presumption will be that it is sound.

2.25 To facilitate this new flexibility, the proposed consultation draft to the NPPF (March 2018) deletes paragraph 158 and provides no equivalent.

2.26 In Charnwood the proposed standardised housing number is very similar to the current OAN. So, for Charnwood, this new Standardised Method alone would not suggest that the employment land needs estimated in the HEDNA need to be adjusted to meet the new 'minimum' housing number. However, the Borough needs to be aware that this is not the case across all districts addressed in the HEDNA.

2.27 Most obviously in the City where the new minimum housing number (1,626 dpa) is considerably higher than that presented in the HEDNA (between 1,230 – 1330).

2.28 This could mean that the City needs to identify additional housing and employment land, and dependent on their supply could look to neighbours to help accommodate this.

2.29 We don't consider this possible unmet need (for jobs) here. This reflects the draft nature of the emerging Guidance, and the likelihood that the numbers quoted above (1,626 dpa) will be superseded by new 2016 based household projections by the time the new method comes into place. But what this does suggest is that HEDNA may need updating in due course to ensure broad alignment with the new NPPF and PPG, even if to only demonstrate that the new numbers do not represent a significant shift in need, and to satisfy the Councils that a more comprehensive update is not proportionate.

3 EMPLOYMENT SECTORS BREAKDOWN

Introduction

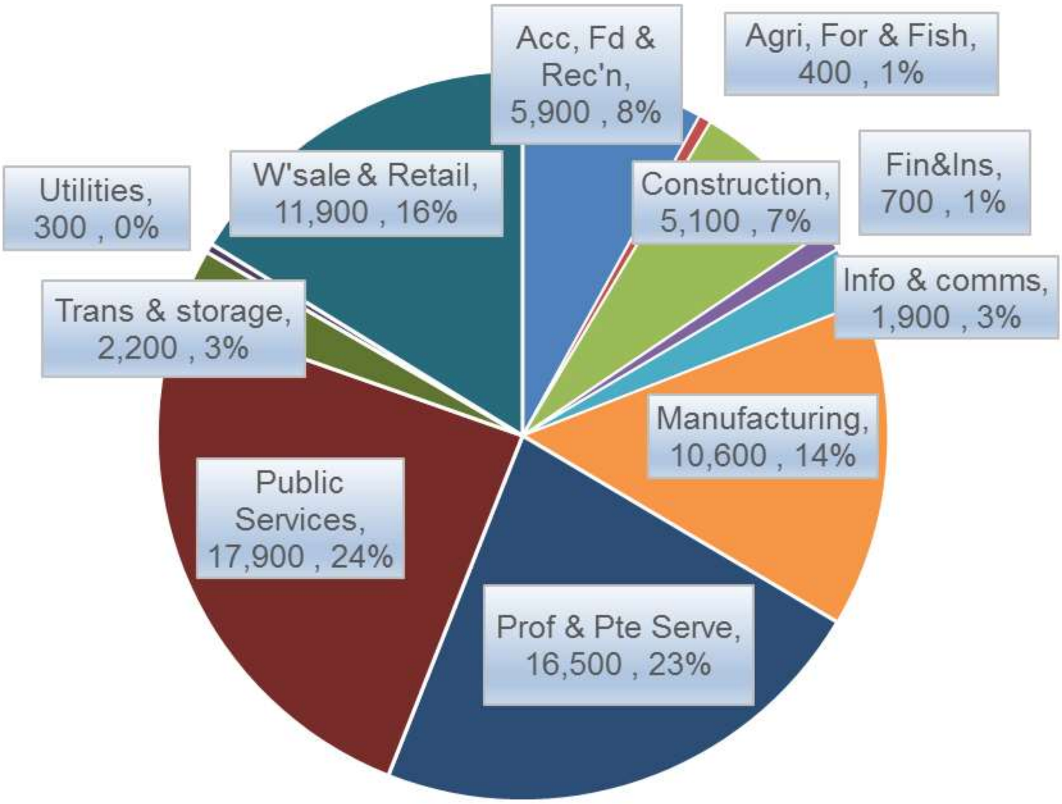
3.1 In this section, we identify the Borough's employment profile starting with current job numbers by broad sector and compare the Borough with the East Midlands region and the LLEP. Then we look to see which sectors and specific job categories are forecast to grow over the period to 2036, and finally how this works through to land use category.

3.2 For our analysis, we use new data from Experian; one of the three main forecasting houses in the UK. In other studies, we would use this to quantify the amount of land needed, but here that is already set by the HENDA. So, this analysis only provides a more detailed view of how the Charnwood economy is likely to change over time which is more up to date that the sector data used in the HEDNA report.

Sector structure today

3.3 Public services account for just about a quarter of all jobs in Charnwood, but the next biggest categories - professional and other private services, wholesale/retail and manufacturing account for just over half, which will be mostly B class jobs with the exception of the retail element.

Figure 3.1 Jobs by broad sector - Charnwood 2016



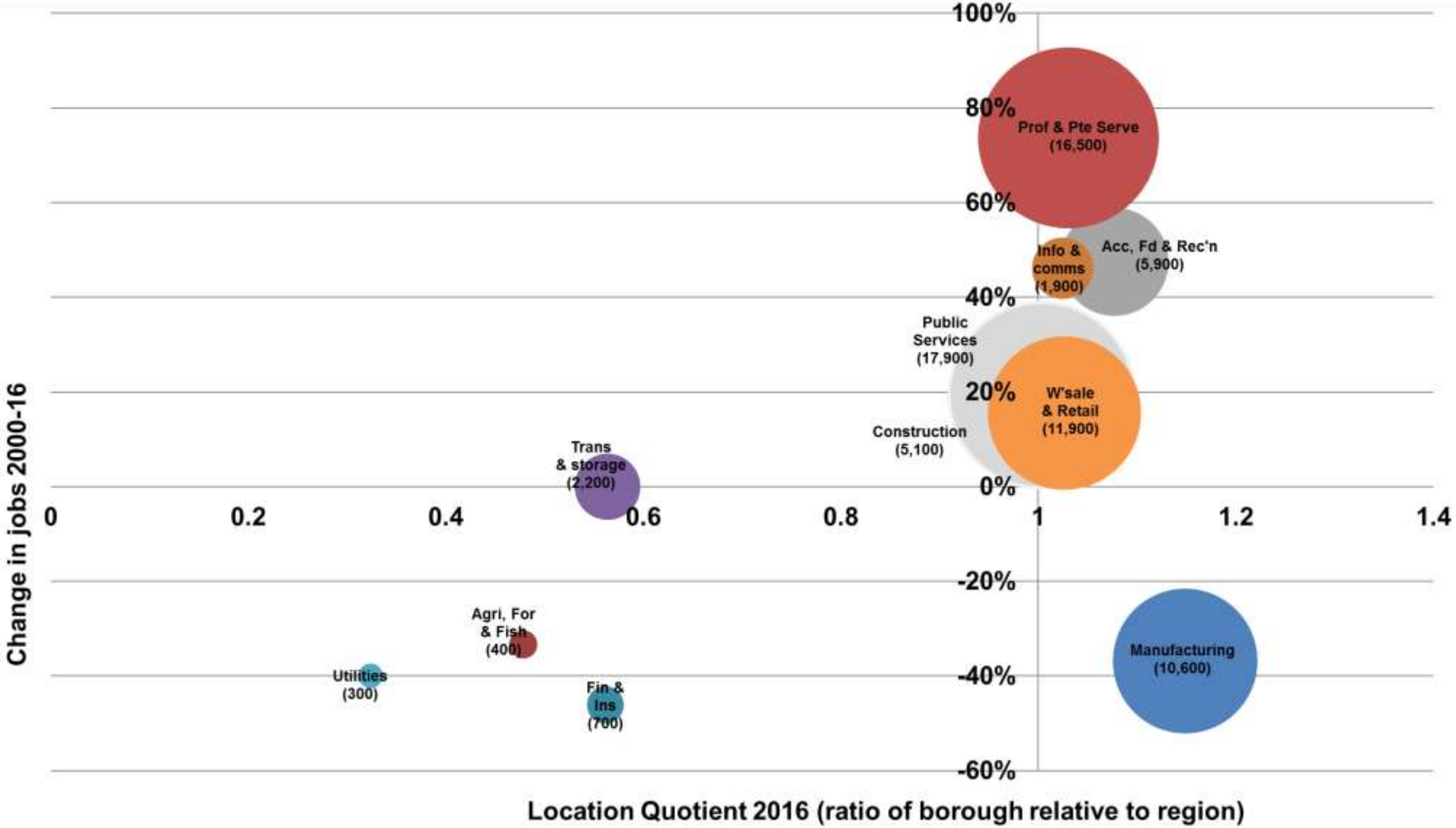
Source: Experian Sept 2017

Location Quotient – what is Charnwood comparably good at?

3.4 The Location Quotient overleaf depicts on the horizontal axis the scale of the broad sectors in Charnwood relative to the East Midlands region (above 1 meaning higher representation compared to the region), and on the vertical axis the proportional change in jobs between 2000/16.

3.5 Manufacturing is the sector that has greater representation compared to the region, but the sector has shrunk in terms of jobs since 2000. The other main sectors are on or close to the regional average, with professional and private services exhibiting the strongest growth since 2000. Transport and storage is a relatively insignificant sector in Charnwood compared to the region with representation around half the regional average.

Figure 3.2 – Location Quotient – Charnwood relative to East Midlands, jobs in 2016

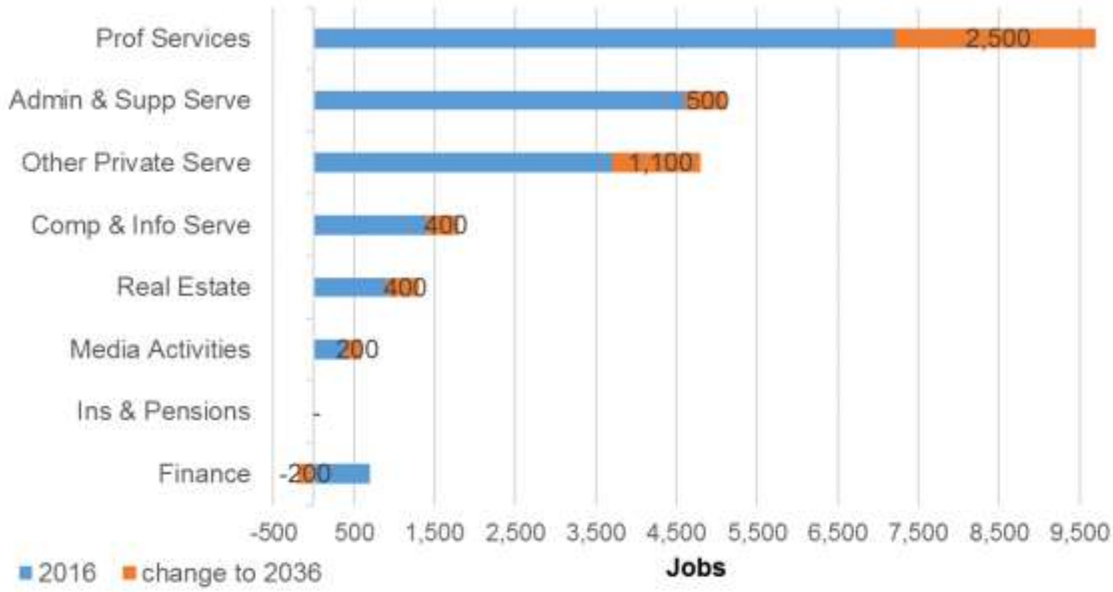


3.6 These broad sectors do not translate neatly across to land use sectors, but exhibit a closer match to land use as category level. Below, we identify the categories that most closely correspond to office and then industrial land use groupings. The charts show the number of jobs in 2016 and the change forecast to 2036.

How may this change in the future?

3.7 Turning first to office, which is the B1a and B1b use classes, the chart indicates that half the growth in office related jobs is forecast to be in the professional services grouping that includes activity such as legal, taxation, accounting, marketing and public relations. Growth in this type of activity, whether in specialist firms or in broader based businesses is not confined to Charnwood, and is forecast to occur in most areas of the country.

Figure 3.3 Office sectors representation - jobs, 2016 - 36



Source: Experian Sept 2017

3.8 We have sought to test this through looking at recent BRES data, and this indicates that between 2015-16 jobs in professional services rose nearly 9% in the LLEP, 6.5% in Charnwood and just below 5% nationally, indicating the strength of growth in this sector. The other half of the office jobs growth is spread across a range of areas.

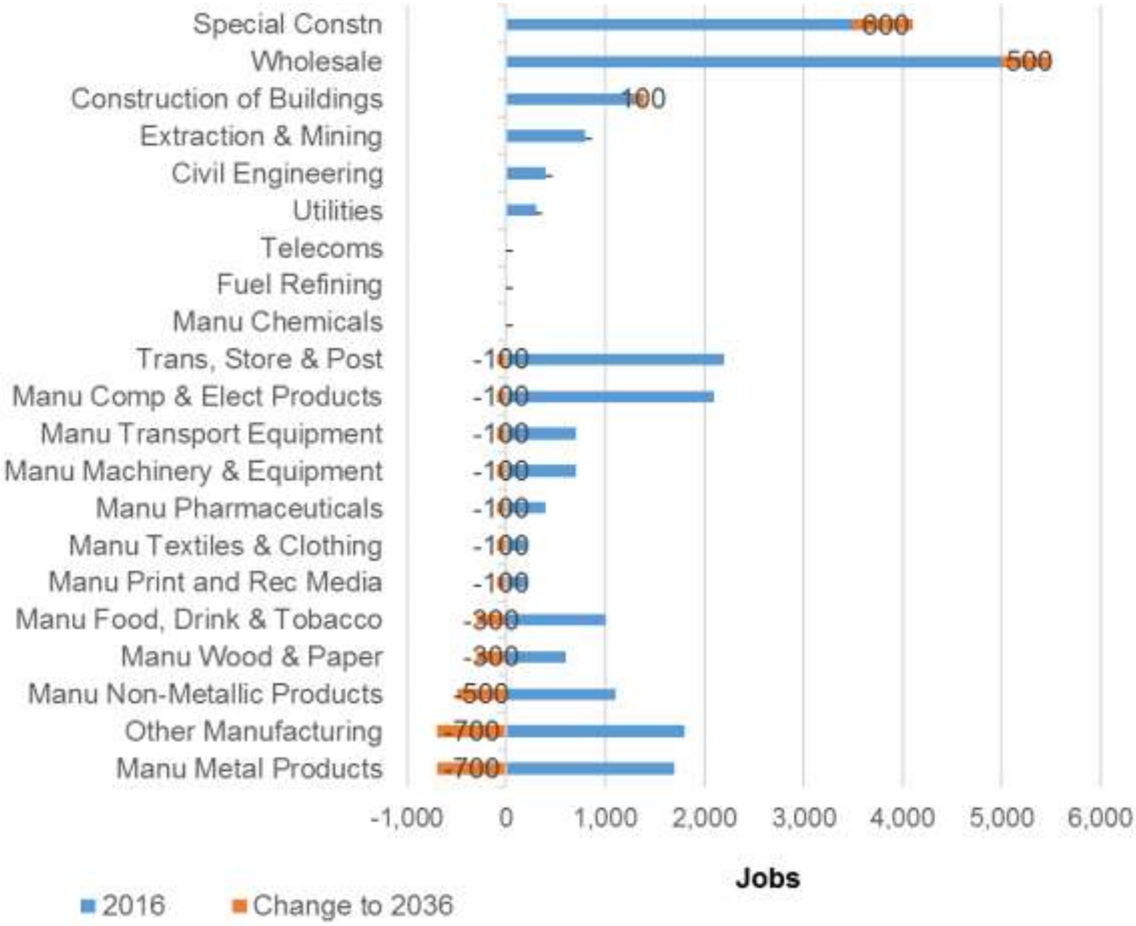
3.9 For the emerging plan this simple analysis shows that, compared to the UK, the Borough has done well and achieved slightly faster growth in these sectors. But not as well as the County. For the Boroughs land supply, what is not evident from the data is the impact that the EZ may have; how this intervention may buck or shape these trends in the future. While the EZ has a defined site(s) there is a hope that this will stimulate economic activity in the wider market, through multipliers and spin off firms. But the trend based job analysis suggests a fairly 'business as usual' approach with only 5,000 jobs in the office sectors across the whole Borough.

3.10 Given developers are often cautious in promoting new land, drawing on their past development experience, the market may need help, or at least some persuasion, to deliver a step change in office provision outside the EZ sites. The data suggests that the Council needs to be realistic when promoting new office land (and space).

3.11 Turning now to industrial jobs, we combine light and general industrial together with warehousing into one category (B1c, B2 & B8) because the types of space and the buildings used by these areas tend to be interchangeable.

3.12 The chart illustrates the difference between the office and industrial sectors with forecast jobs growth being confined to the construction and wholesale categories, with all other categories, the utility and manufacturing categories seeing stagnation or declining job numbers.

Figure 3.4 Industrial sectors representation - jobs, 2016 - 36



Source: Experian Sept 2017

3.13 Overall, the job losses outweigh the gains, albeit the decline in job numbers across the manufacturing sector is forecast to slow compared to the rate of decline in the past. Figure 3.2 showed that the manufacturing sectors lost 35% of their employment in only 16 years, so much faster than the data above shows.

3.14 For the Council's land supply, what is apparent is a continued contraction of the 'traditional' manufacturing sectors – but not a collapse – and growth in newer 'people serving' sectors such as wholesale and utilities.

3.15 Manufacturing will remain a core element of the local economy and the era of very high industrial and manufacturing job losses, and so releases of industrial sites, may be over as manufacturing job losses lessen over time.

3.16 For the next plan, and development management decisions going forward, policy will need to manage the shift from an established pattern of managing manufacturing decline, and so the release of land and sites no longer needed, to a more stable manufacturing future.

3.17 Secondly; qualitatively, some of the stock, may not match the needs of the growing industrial sectors. Some sites and property may need to regenerated or redeveloped to appeal to the growing warehouse and transport sectors while manufacturing space may need to be renewed or redevelopment so that the remaining stock of firms can use their space as efficiently as possible.

4 THE PROPERTY MARKET

Overview

4.1 This chapter reviews the Borough property market for employment space.

4.2 For both offices and general industrial/distribution space, we look at the balance of the market and potential land for future employment development.

4.3 The main purpose of the analysis is to identify where there is potential demand for new floorspace, and hence a need for development land to be identified in the emerging plan. This also provides much need qualitative evidence to help decision making.

4.4 This analysis looks shorter term than the economic forecast discussed and HEDNA data. This is because it is by extensive consultation with market agents and occupiers; who by nature tend to take a shorter term view than the data informing the HEDNA.

4.5 In relation to demand we look at the types of business that are taking space in the Borough (or may be considering doing so), and the property specification in terms of size and quality.

4.6 In relation to supply and market balance we look at the currently available stock (recently developed and in the pipeline) and the rental values and capital values that properties in the area are achieving.

4.7 The purpose of the analysis is to determine:

- How far the existing floorspace stock is meeting current and foreseeable occupier requirements; and hence
- How far there is likely to be demand for more or different space, now and in the future; or conversely
- If property and land are oversupplied, overall or in particular sections of the market.

4.8 As part of this work each of the Borough’s existing employment sites have been visited and assessed. The audit of this assessment is found in the appendix along with an explanation of how each site was assessed.

4.9 The existing sites available for general market employment extend to 356ha of land in employment use, excluding the 40ha at LUSEP and Charnwood Campus. In addition, we visited and assessed all the undeveloped, unbuilt out, employment allocations from the local plan (the ‘E’ sites) and those from the Core Strategy that could provide an additional 89ha for the general employment market. A further 64ha is to be found on sites that were put forward through the recent call for sites. The findings from this audit, and the experience / knowledge gained from visiting the sites, is integral to this assessment and property market analysis.

4.10 A strength of the market-facing analysis, coupled with an assessment of sites, is that it considers real-life property transactions, including the values (rents and prices) realised in such transactions, and whether these values are enough to support viable development. This provides evidence of effective, or viable, demand – which means that potential occupiers will pay enough, and (where relevant) have enough covenant strength[4], to support financially viable development. This is important because only sites that are viable will be delivered in practice, and in line with national planning policy Local Plans should identify sites for employment only where they are likely to be delivered. Thus, the National Planning Policy Framework advises that plans should be deliverable (para 173) and planning should avoid safeguarding employment sites that have no reasonable prospect of being used for that purpose (para 22).

Sources and definitions

4.11 The property market research draws on the following sources:

- The property market database Estates Gazette Interactive (EGi) and commercial property research reports for evidence of take-up, availability and values, both for the market overall and individual properties.
- Total stock figures are derived from analysis of Valuation Office Agency (VOA) data on business rate assessments. This data is cross-referenced with the EGi data to provide an indication of vacancy rates. Cross referencing the EGi and VOA data does have limitations as the sources are different therefore not guaranteeing the description on unit type or size being the same, but this provides a reasonable cross-check. The reason why there may be discrepancies with the unit type is that the VOA data has 117 description codes, of which 34[5] are used in this analysis whereas agents may list property on EGi for industrial or office purposes that do not fall in the VOA categories. Part of the reason the size data may not correlate is that EGi may provide a total floor area for a single building, whereas the VOA data may list this subdivided into various suites and vice versa. Due to the volume of data it has not been possible to iron out these discrepancies.
- For greater qualitative understanding of the market, extensive consultation has been undertaken with agents, developers and investors active in the Borough and surrounding areas via telephone discussions and at a stakeholder workshop hosted by the Council.

4.12 The main market indicators considered are rental values, recent take-up and floorspace availability (vacancy). In a property market context, 'take-up' means the

---

[4] A business tenant has strong covenant if there is good evidence that they will be in good financial health, and able to pay the rent, through the period of the tenancy.

[5] Factory and premises; Storage; Storage depot and premises; Store; Store & premises; Store and premises; Store, store and premises; Stores and premises; Warehouse, office and premises; Warehouse; Warehouse & Premises; Warehouse and Premises; Warehouse and premises; Warehouse showroom and premises; Warehouse, office and premises; Warehouse, offices and premises; Warehouse, bottling plant and premises; Workshop; Workshop & premises; Workshop and premises; Workshop, office and premises; Workshop, petrol filling station and premises; Workshops and premises; Worksop and premises; Office & premises; Office and premises; Offices; Offices & premises; Offices (no access); Offices and premises; Offices studio and premises; Offices, office and premises; Offices, workshop and premises; Offices, Community room and premises; Offices, meeting rooms, crèche & premises;

occupation of business floorspace[6]. Take-up covers both new-build and second-hand space (second-hand being the larger share of the market). [7.] Availability considers all space currently being marketed (new and second-hand space).

4.13 The property market is considered from three different geographical areas:

- Loughborough – the urban area of Loughborough (excluding the both the Charnwood Campus and Loughborough University Science and Enterprise Park
- Shepshed – the extent of the urban area of Shepshed
- South of the Borough – takes into account the northern fringe of the urban extent of Leicester. Including: Birstall, Thurmaston, Syston and East Goscote.

Plus 'Rural Charnwood' – which is the rest of the Borough excluding the above.

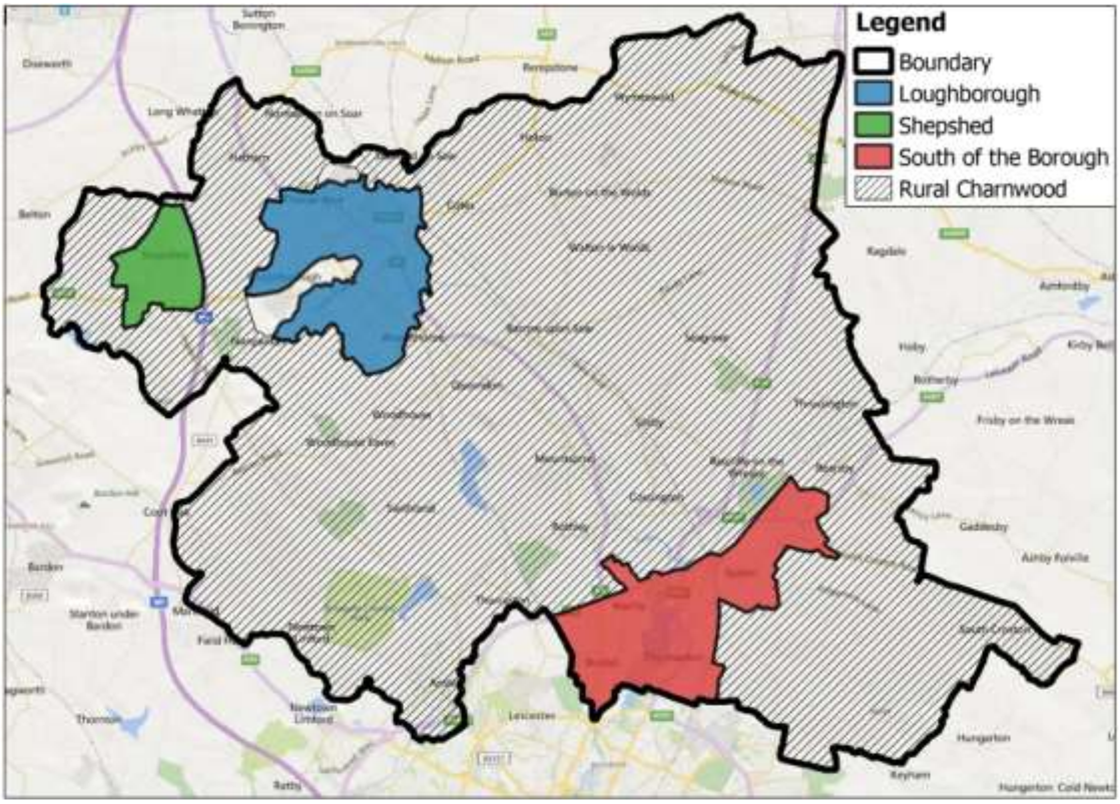
4.14 These have been identified from site visits, consultation with agents and differences in occupier demand and profile. They are not exclusive and any market area is 'permeable'. In this case there is some evidence that occupiers do not see the market areas perfectly substitutable; a firm looking for property in Loughborough may not want space in the South area for example. So the Council needs to try and balance its land portfolio across the areas.

4.15 The boundaries of the above areas are shown in Figure 4.1. Note the Enterprise Zone sites are excluded as they do not form part of the market analysis.

[6] By contrast, in a planning context 'take-up' means the land developed to provide new floorspace.

[7] Second-hand stock comprises all previously occupied floorspace, including refurbishments.

Figure 4.1 Area boundaries



Source: AV

4.16 To allow us to gain an understanding of supply and demand trends we have analysed the data in different side bands – these are set out in Table 4.1 for industrial and Table 4.2 for offices.

Table 4.1 Industrial size range bands

Sq ft	Sq m	Label
up to 1,000	Up to 93	Micro
1,001 – 2,000	93 – 186	
2,001 – 3,000	186 – 279	
3,001 – 4,000	279 – 372	
4,001 – 5,000	372 – 465	
5,001 – 25,000	465 – 2,323	Small
25,001 – 50,000	2,323 – 4,645	Medium
50,001 – 100,000	4,645 – 9,290	Mid box
100,001 plus	9,290 plus	Large/distribution warehouses

Source: AspinallVerdi

Table 4.2 Office size range bands

Sq ft	Sq m	Label
up to 1,000	Up to 93	Micro
1,001 – 5,000	93 – 465	Small
5,001 – 20,000	465 – 1,858	Medium
20,000 plus	1,858 plus	Large

Source: AspinallVerdi

Background

4.17 As illustrated in Figure 4.2, the Borough is located in Leicestershire, north of the City of Leicester, south of Derby and Nottingham, and north east of Birmingham. The M1 runs through the west the Borough, with Shepshed lying to the west of the motorway and Loughborough to its east.

Figure 4.2 Location and administration boundary

Source: Google maps (2017)

4.18 The M1 corridor is a "sweet spot" for large-scale strategic distribution facilities; as we show in this chapter demand is strong and supply is tight. There is a shortage of space across the whole area with occupiers finding it difficult to satisfy their requirements. In addition to the M1 corridor, the Borough is located in close proximity to the logistics Golden Triangle (M1, M6 and M42), another large-scale strategic distribution "sweet spot".

4.19 The Borough itself has no large strategic distribution parks reflecting the limited amount of development land around the junctions in the district. But surrounding the Borough are some major developments and very strong demand / market pressure:

- Mountpark Barton to the west, providing over 1.3 million sq ft (120,000 sq m) of distribution warehousing over two phases of development.
- East Midlands Gateway, to the north of the Borough, in an even larger development, and is currently being built out by Segro. This is a 700-acre development with planning consent for up to 6 million sq ft of logistics accommodation (560,000 sq m).

4.20 Due to the scale of requirements, strategic distribution activity is led by site availability across the region. The Borough has not had any suitable sites for strategic distribution, therefore it has not attracted these occupiers, despite a geographically suitable location.

4.21 The focus of the Borough's industrial market is local, regional and national occupiers in sectors such as advanced manufacturing and engineering. The Borough has a long association with manufacturing and engineering, having developed over a number of decades; with companies contracting and being replaced by similar industries.

4.22 In the north of the Borough, we found a large number of high technology firms, including smaller pharmaceutical firms on the general employment areas showing that the general industrial areas complement the Science Park. Given the EZ and Science Park hopes to stimulate this demand further this gives emphasis to the importance of maintaining a healthy industrial stock in the area. While it is impossible to quantify, a shortage of general space could constrain the potential of the Science Park to 'spin off' firms and generate added industrial value. This 'halo' effect does not appear to spread into the South of the Borough where more traditional general industrial is prominent. But sites in all areas are full, with low levels of vacancy.

4.23 The Borough's office market is mixed. It is relatively small scale in the north providing premises for local professional services. In the South of the Borough there are larger modern purpose-built premises that satisfy demand from established companies in the Borough.

4.24 Before we move on to look at the industrial and office sectors, we firstly summarise the scale and distribution of the existing stock within the property market areas. This work involved assessing the 49 employment sites existing in 2017, Table 4.3 summaries the overall position.

Table 4.3 The existing employment stock

Market area	Sites	Ha
Loughborough	13	173.8
Shepshed	4	49.7
South of the Borough	21	91.0
Rural Charnwood	11	41.2
Total	**49**	**355.7**

Source: CBC GIS mapping data & PBA analysis

Nb these figures exclude the LUSEP (26ha) and Charnwood Campus (14ha)

4.25 Half the land area is located in Loughborough, and these sites are generally much larger than sites elsewhere. In the period since the Local Plan was adopted in 2004 13 sites have been released entirely from employment to other uses[8], and a number of other sites have been partially redeveloped for non-employment uses. Overall 27.8ha has been released from employment use, and this has been evenly distributed across the Borough's property market areas. These losses have been balanced by gains to the Woodbrook Industrial Estate in Loughborough, Watermead and Interchange Birstall in south of the Borough.

4.26 Over the period since 2004 there is likely to have been a considerable amount of non-designated employment land that will have been lost to other uses.

The industrial market

Introduction

4.27 Normally when reviewing the market, we would separate the B1c and B2 market from the B8 market because the latter has different demand drivers, but because the B8 market is very weak in the Borough, for the market analysis, we combine industrial and distribution uses (B1c, B2 and B8) into one property market sector. This is the standard approach in such areas as the property requirements of occupiers across these sectors are broadly similar.

National context

4.28 The national industrial market is in a period on strength. In the global economic crisis speculative development came to a halt. At that point in time there was excess supply to meet demand due to weakening occupier demand and the wave of speculative development that had occurred pre-financial crisis (driven by easy access to finance).

4.29 In recent years supply, has tightened, this is due to; improvement in the economy, changing shopping patterns (increase in online sales), and some units being lost to higher value residential uses. Most recently, the weakness of the pound, has supported growth in the UK manufacturing sector, by making exports more competitive.

4.30 In some areas of the country supply of industrial units has not kept pace with demand due to the lack of new build development occurring. Developers are finding it much harder to fund industrial warehousing development compared to pre-financial crisis. Due to the tight nature of the funding markets, speculative development is generally only occurring in 'super prime' areas (e.g. parts of the M1 corridor, Golden Triangle, Heathrow etc.). These areas have very strong occupier demand from blue-chip covenants, therefore the perceived development risk is low.

4.31 The lack of speculative development has led to an imbalance in the market with some occupiers having to wait for build to suit opportunities; or taking second-hand space or multiple units to satisfy immediate requirements. With a lack of suitable medium

[8] A list of the 13 is appended to the site assessment Appendix.

sized space, occupiers across the midlands and south of the country are struggling to find suitable space to expand into. This is having a knock-on effect, with smaller units not experiencing natural levels of market churn, and therefore not freeing up space for SME's and start-ups.

4.32 The current imbalance in the market is not likely to improve, with noted property agents Cushman & Wakefield stating that *"In the short-term, occupier demand is expected to remain strong, supported by both a rise in exports and ecommerce related activities. Severe supply constraints in key regional markets should continue to put upwards pressure on prime rents."*[9]

4.33 Over the long term, there is of course more uncertainty with Cushman & Wakefield predicting that *"demand for industrials will fluctuate with economic drivers such as the value of sterling, manufacturing and production, exports, domestic consumption and BREXIT."*

Charnwood as an industrial location

4.34 The Borough has a long history in manufacturing and engineering with firms such as Brush Engineering operating in the Borough for well over 100 years. Whilst nationally the manufacturing has been shrinking over a number of decades, the Charnwood market has remained robust and has evolved with its "roots" still in manufacturing and engineering.

4.35 The Borough benefits from a diverse mix of blue- and white-collar employment, giving it a broad mix and a robust economy. The wide-ranging employment sectors include:

- Manufacturing
- Light manufacturing
- High tech engineering
- Research and design
- Local construction supplies

4.36 Loughborough has strong connections with research and design, and advanced engineering, which is in large part due to the research activity at the University Science Park where much of the R&D facilities are located, but this activity does also 'spill out' into the existing industrial estates.

4.37 As noted at paragraph 4.13 above we have split the Borough into four market areas to provide finer grained detail. These are discussed as follows:

Loughborough

4.38 Loughborough is the Borough's main industrial area, and stock is located mostly around the railway station and to the north of the town centre.

4.39 The industrial stock around the railway station comprises the Brush Engineering site, and land that was formerly part of Brush (Falcon Industrial Estate), that remains in

[9] Cushman & Wakefield (Spring 2017) *UK Industrial & Logistics Market Outlook*

manufacturing and engineering use. The quality of the existing stock is good, and is well occupied.

4.40 To the north of the town centre are established industrial estates such as Charnwood Business Park, Bishop Meadow and Swingbridge Industrial Estate. As shown in Figure 4.3 these estates have been developed over a period of time, and this area north of the town centre, referred to as the Belton Road area, is now one large industrial area. The age and size of the existing stock varies and appears well occupied. Occupiers include trade counter operators (e.g. Jewson and Electrical Factors), manufacturing and engineering (e.g. Thermo Fisher) and food and catering (BI Group).

Figure 4.3 Loughborough Industrial Stock

Source: AspinallVerdi (2017)

4.41 At the very north of this large industrial area, north of Bakewell Road is the former Astra Zeneca site, which is now promoted as the Charnwood Campus offering specialist scientific R&D space, one of the two EZ sites in the Borough. The site is developed to a low density with potential for intensification, but its specialist nature means that it is unlikely to be available for 'normal' types of industrial use without a change in policy.

4.42 Northwest of Loughborough Railway station is the Ark business incubation space and the Meadow Lane workshops that provide start up space for business. This space is full and there is a lack of grow-on space for successful businesses.

4.43 Between the Belton Rd industrial area and the town centre is much older generally lower quality lower cost industrial stock, south of the A6004 (Belton Rd) in areas such as Station Approach, Chainbridge and Nottingham Rd. These areas have a high proportion of people servicing activity characterised by motor servicing/repair. However, even here the estates are fully occupied.

4.44 As noted above the lack of grow-on space for smaller firms is of general concern in Loughborough, whether this is associated with the EZ/Science Park or anywhere else. Simply put there is little, if any 'local quality' supply for firms 'spinning out' from the EZs to accommodate in the local area. Nor is there space to accommodate the supply chain for the EZ.

Shepshed

4.45 Shepshed is located in the north west of the Borough, west of the M1 next to Junction 23 of the M1 north of Ashby Road. Shepshed's main industrial area is to the south of the town centre off Charnwood Road. As shown in Figure 4.4 these industrial estates have been developed over a long period of time, providing a mix of size and quality of units. The most modern units are found at Illuma Park. Overall the units appear generally well occupied and maintained.

4.46 In Shepshed the majority of occupiers are linked to manufacturing and engineering such as; Kirton Engineering, Meggit Polymers & Composites and Force Engineering.

4.47 There are smaller industrial sites elsewhere in the town such on Charnwood Road, Anson Road and Sullington Road, but these have recently or are planned for whole or partial release from industrial use.

Figure 4.4 Shepshed Industrial Stock

Source: AspinallVerdi (2017)

South of the Borough

4.48 The industrial stock in the South of the Borough is different to the north. As shown in Figure 4.5 the size of units here are smaller and some units are poorer quality than that found in the north, but occupancy levels remain high. The main industrial areas in the south are around Thurmaston Lane, Bridge Park and Earl's Way; the latter is constrained – being accessed through a housing estate and the need for vehicles to pass primary schools. The South of the Borough has seen very recent new build development in Birstall at the Interchange and The Burrows, East Goscote Industrial Estate.

4.49 The South of the Borough attracts a mix of occupiers, including some engineering, but of smaller scale than to the north e.g. Joss Engineering, Melton Road and Unitec, Earls Close.

4.50 There is also a network of small, isolated industrial property in the main settlements in the South of Borough. These are effectively legacy industrial properties and may not meet modern business needs over the longer term. But in the short term they provide in demand secondary space.

4.51 In our conclusions we suggest that the Council considers releasing poorer quality sites in this area and providing new capacity to offset these losses. For the Earls

Way site in particular it is questionable whether, in the long term, policy should promote continued employment related investment here. Or commence a long term and manged release where, working with the landowner tenants are provided with space elsewhere and their site redeveloped foe an alternative use.

Figure 4.5 South of the Borough Industrial Stock

Source: AspinallVerdi (2017)

Rural Charnwood

4.52 Rural Charnwood is the largest geographical market area and has a wide variety of different industrial stock and occupiers. Units are generally smaller than the rest of the Borough. Connectivity is an issue in many of the small towns/villages so occupiers that require good road access, are often not attracted to these locations. This being said there is still little availability; all estates are well occupied.

4.53 Figure 4.6 shows some examples of the type of stock in rural Charnwood. There are a mix of occupiers in rural areas, for example; Solumetrics and Bondrite Adhesives in Barrow upon Soar (both chemical manufactures); M Wright & Sons in Quorn (manufacturing narrow fabrics); Morelli Group in Hathern (distribute automotive parts)

Figure 4.6 Rural Charnwood Industrial Stock

Source: EGi (2017)

Demand

4.54 Demand for industrial space in the Borough has been steady since 2013. Table 4.4 shows that between 2013 and 2016 the annual industrial take-up averaged 456,762 sq ft across 221 transactions. Current take-up for 2017 is 36,727 sq ft, which is significantly less than in previous years. This is a trend which we have recently seen in other parts of the Midlands and south of England, and agents have confirmed that the reason why take-up is down compared to previous years is due to a lack of supply, and not falling occupier demand.

Table 4.4 Annual industrial take-up, 2013-17

Calendar Year	No. of transactions	Total take-up sqft
2013	50	353,318
2014	60	457,179
2015	59	691,705
2016	44	324,847
2017	8	36,727
Total	**221**	**1,863,776**
Annual average 2013 - 2016	**53**	**456,762**

Source: EGi (2017)

4.55 Table 4.5 shows that the spread of take-up in different bands is broad. The majority of stock that has been take-up is under 5,000 sq ft, totalling 60% of the overall number of units taken. In this size band 57 units have been take-up between 2,000 – 3,000 sq ft. There is also a considerable number of transactions between 5,000 – 25,000 sq ft accounting for 35% of the overall take-up. There have been far less transactions in the over 25,000 sq ft category, with a total of 12. This accounts for 5% of the overall number of units taken up since 2013.

Table 4.5 Industrial take-up by size 2013-2017

Size range	Total No of units	% of units by size range
up to 1,000 sqft	12	5%
1,001 – 2,000 sqft	28	13%
2,001 – 3,000 sqft	57	26%
3,001 – 4,000 sqft	24	11%
4,001 – 5,000 sqft	11	5%
5,001 – 25,000 sqft	77	35%
25,001 – 50,000 sqft	9	4%
50,001 – 100,000 sqft	2	1%
100,001 sqft plus	1	0%
Total	**221**	**100%**

Source: EGi (2017)

4.56 Table 4.6 shows a selection of the broad range of occupiers who have taken space in the Borough since 2013[10]. Some of the take-up is from existing occupiers expanding and taking larger or more units. Take-up data also illustrates strong demand for smaller units specifically from existing occupiers in the Borough.

Table 4.6 Examples of take-up by area 2013-17

Industrial estate	Occupier	Sector	Size of unit (sq ft.)
Loughborough	Online Building Plastics Limited	Manufacturing	1,313
	Eurocell	Building Materials Supplier	5,705
	Decotel Limited	Distribution (hospitality industry)	22,594
	EPS UK	Manufacturing (electrical components)	5,533
	Event Engineering Limited	Design and Build sets etc. for bespoke events	15,016
	Freeway Fleet Management	Software Design Solutions	1,894
	Charles Bentley and Son	Manufacture and Distribution of home	202,815

[10] We select a sample of transactions to illustrate the range. There are too many to show all transactions, and a high number do not have complete data records. The limitations with the EGi data mean that for industrial transactions we have no examples to include for Shepshed.

Industrial estate	Occupier	Sector	Size of unit (sq ft.)
		and gardening equipment	
South of the Borough	Label Apeel Limited	Manufacturing (labelling and packaging)	36,404
	Phormula	Advanced manufacturing (performance automotive components)	2,799
Rural Charnwood	Cambridge Satchel Company Limited	Manufacturing (Clothes)	39,999
	Kanga UK Limited	Manufacturing (Digging equipment)	23,347
	Drummotors and More Limited	Industrial equipment supplier	4,618
	M E C Precision Engineering	Advanced Manufacturing (CNC components)	2,766
	Pash Limited	Manufacturing (Furniture)	2,497
	Smoke and Fire Curtains Limited	Manufacturing (Fire protection solutions)	11,367
	W.F. Howes Limited	Manufacturing (Audio Books)	13,401

Source: EGi, AVL 2017

4.57 Agents report that the majority of take up in recent years has come from similar type of sectors/occupiers as reported in Table 4.6. SME occupiers drive the market in the Borough; there are fewer corporate occupiers. Key sectors taking space in the borough include;

- Manufacturing
  - Food
  - Light goods
- High Tech engineering
  - Electronic components
  - Automotive equipment
- Local construction supplies

4.58 Some occupiers are having to remain in premises that are not fit for purpose because there are no suitable alternatives available.

4.59 Take-up generally comes from occupiers already located in the Borough. Company workforces are usually located in the area, and when occupiers require new premises they seek to remain in the area so as to retain their workforce. Recently some occupiers out-with the Borough have widened their search area for premises due to the lack of availability of industrial space across the region. Typically, it is only those industries that have a well-paid workforce that are prepared locate in neighbouring areas because their workforce is able to travel by private transport and prepared to commute further.

Occupiers requirements

4.60 Agents confirmed at the stakeholder event that generally there is strong demand for units of up to 15,000 sq ft. Occupiers require a mix of unit types: for smaller new units (up to 5,000 sq ft) flexibility is require i.e. having the option to install a mezzanine floor. Agents report that with slightly larger units, occupiers like a traditional configuration; roller shutter doors, secure yard, 6 metre eave heights and a small element of offices.

Freehold demand

4.61 The area is considered to be relatively cash rich and the majority of occupiers prefer the security of owning their industrial units. This is across size ranges up to 15,000 sq ft. There is minimal freehold availability and low market churn. In recent years, where there has been development activity, these have only been made available on a leasehold basis. Freehold occupiers will often stay in units longer than leasehold occupiers, even when they need to expand. Often owners/directors will buy their business property for Self-Invested Personal Pensions purposes.

Unsatisfied requirements

4.62 Agents report that they have a number of outstanding unfulfilled requirements, mostly from existing occupiers looking to expand. These are general and light manufacturers, and last mile delivery occupiers, seeking units up to 15,000 sq ft, but there is very little available stock.

Supply and market balance

4.63 Table 4.7 shows that there are 29 units available, which equates to a total of 470,000 sq ft. This is against a total stock of 1,429 units / 12.5 million sq ft[11]. Therefore, the current vacancy rate for the Borough is 3.8% of floorspace and 2.0% by unit number. If we cross-reference the availability with annual take-up in Table 4.4; the availability across the Borough equates to seven month’s supply in relation to number of units and 12 month’s supply by floorspace – both these indicators show the market is very tight.

[11] Source: VOA

Table 4.7 Availability of industrial space

Total Stock	12.5 mil sqft	1,429
Availability	470,000	29 units
	3.8%	2.0%

Source: EGi, VOA, AspinallVerdi (2017)

4.64 Vacancy in terms of total floorspace is low, but more critically vacancy of units is very low. There is very little stock available for occupiers to take-up in the current market, further analysis of vacancy per employment area is provided below.

Loughborough

4.65 Table 4.8 shows that there are just seven units available on EGi against a total stock of 492 units, equating to a vacancy rate of 1.4% of units. Again, vacancy here is very low, especially under 5,000 sq ft. Around two-thirds of the total stock falls under the 5,000 sq ft size band, and there are just two units available - this is of particular concern given this is the Borough's main industrial area. Four units are available within the 5,000 – 25,000 sq ft size band, which is more than half of the unit availability in Loughborough.

Table 4.8 Loughborough industrial stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	103	21%	0	0.0%
1,001 – 2,000 sqft	101	21%	1	1.0%
2,001 – 3,000 sqft	77	16%	1	1.3%
3,001 – 4,000 sqft	33	7%	0	0.0%
4,001 – 5,000 sqft	23	5%	0	0.0%
5,001 – 25,000 sqft	122	25%	4	3.3%
25,001 – 50,000 sqft	15	3%	1	6.7%
50,001 – 100,000 sqft	12	2%	0	0.0%
100,001 sqft plus	6	1%	0	0.0%
Total	**492**		**7**	**1.4%**

EGi, VOA, AspinallVerdi (2017)

Shepshed

4.66 Table 4.9 shows that vacancy in Shepshed is very low, with only two units available on EGi against a total stock of 86 units. Over half the stock (circa 60%) is under 5,000 sq ft, with only one unit currently available. Agents reported that the VOA has its limitations in respect of data on Shepshed, i.e. there appeared to be too many units in the 5,000 – 25,000 sq ft size band. But overall agents agreed that vacancy in Shepshed is very low. The lack of vacancy for under 5,000 sq ft units is a concern given this is where agents identify greatest demand.

Table 4.9 Shepshed industrial stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	14	16%	0	0.0%
1,001 – 2,000 sqft	15	17%	0	0.0%
2,001 – 3,000 sqft	10	12%	0	0.0%
3,001 – 4,000 sqft	9	10%	0	0.0%
4,001 – 5,000 sqft	2	2%	1	50.0%
5,001 – 25,000 sqft	25	29%	0	0.0%
25,001 – 50,000 sqft	4	5%	1	25.0%
50,001 – 100,000 sqft	5	6%	0	0.0%
100,001 sqft plus	2	2%	0	0.0%
Total	**86**		**2**	**2.3%**

EGi, VOA, AspinallVerdi (2017)

South of the Borough

4.67 Table 4.10 shows that there are currently 12 units available against a total stock of 457 units, equating to a vacancy rate of 2.6% units. Again here around two-thirds of the stock is under 5,000 sq ft, but in contrast to Loughborough this is the band where there is the greatest availability. There are a total of eight units available between 2,000 and 5,000 sq ft. All the availability is of second hand units, most of reasonable quality and around 20-30 years old.

Table 4.10 South of the Borough industrial stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	78	17%	0	0.0%
1,001 – 2,000 sqft	78	17%	0	0.0%
2,001 – 3,000 sqft	87	19%	1	1.1%
3,001 – 4,000 sqft	45	10%	4	8.9%
4,001 – 5,000 sqft	25	5%	3	12.0%
5,001 – 25,000 sqft	120	26%	3	2.5%
25,001 – 50,000 sqft	11	2%	0	0.0%
50,001 – 100,000 sqft	9	2%	0	0.0%
100,001 sqft plus	4	1%	1	25.0%
Total	**457**		**12**	**2.6%**

EGi, VOA, AspinallVerdi (2017)

Rural Charnwood

4.68 Table 4.11 shows that there are eight units available against a total stock of 394 units, equating to a unit vacancy rate of 2%. The rural stock is predominantly smaller, with just under 80% 5,000 sq ft or smaller; around 30% of the units are 1,000 sq ft or less. All the availability is in units of less than 25,000 sq ft. Overall vacancy is low in each size range, and there is no more than two units available in each size band.

Table 4.11 Rural Charnwood industrial stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	125	32%	2	1.6%
1,001 – 2,000 sqft	76	19%	1	1.3%
2,001 – 3,000 sqft	62	16%	1	1.6%
3,001 – 4,000 sqft	20	5%	0	0.0%
4,001 – 5,000 sqft	23	6%	2	8.7%
5,001 – 25,000 sqft	72	18%	2	2.8%
25,001 – 50,000 sqft	7	2%	0	0.0%
50,001 – 100,000 sqft	5	1%	0	0.0%
100,001 sqft plus	4	1%	0	0.0%
Total	**394**		**8**	**2.0%**

EGi, VOA, AspinallVerdi (2017)

Recent developments

4.69 The most recent development is the Interchange at Birstall at the junction of A6/A46 in the South of the Borough. The development has recently completed and has reportedly let well. It is very well located and includes a range of unit sizes from 2,750 sq ft – 15,000 sq ft, which agents report match the demand. There is land surrounding the completed development which has further industrial development proposed on a design and build basis.

Development opportunities

Loughborough

4.70 The 2004 Charnwood Local Plan identifies three sites for employment use in Loughborough:

- The first is for specialist R&D activity, for the expansion of the Science & Enterprise Park (E4) – this has been largely built out through the recent construction of the Advanced Technology and Innovation Centre.
- Site for extension to Woodbrook Industrial Park (E/5(b)) – this was built out some time ago and is known as the Castle Business Park.

- Dishley Grange which is two parcels (E/5(c)) – the smaller southern parcel is Council owned, appears to be deliverable, but is yet to come forward. The much larger northern parcel has flood risk, access and unwilling owner issues that seriously question the site's deliverability. In our recommendations, we suggest the Council takes a critical look at this (old) allocation with a view to de-allocating it.

4.71 The 2015 Core Strategy identifies one site in Loughborough suitable for a Sustainable Urban Extension:

- Land west of Loughborough (CS22)), which is a large site (465ha) that identifies three parcels of land (totalling 16ha) suitable for employment use. These are close to the motorway and are clustered around the household waste / civic amenity site that includes waste water treatment. A new access road off the A512 Ashby Road is needed before the site can come forward, but as yet this is neither funded nor programmed. Therefore, this location has long term potential, but will not solve the short-term lack of supply.

4.72 The Core Strategy also identifies land for the further expansion of the Science & Enterprise Park (CS23):

- land for LUSEP expansion east and west of Snell's Nook Lane south of the A512. As explained elsewhere, this site is ear marked for the very specialist Science Park R&D employment uses, and not for the normal types of employment addressed by this study. The land is currently used as farmland, and its future use is central to the Council's Vision and a critical priority in the Council's Corporate Plan and Regeneration Strategy. Whilst land to the east of Snells Nook Lane could possibly be delivered through the existing access arrangements, land to the west would require improved access arrangements, linked to progress on the SUE immediately to the north.

4.73 Neither in the call for sites or in our own research have we identified other additional sites in Loughborough that are suitable for industrial uses.

Shepshed

4.74 There are no existing Development Plan employment land allocations in Shepshed.

4.75 However, a site that did come forward through the call for sites is - land off Fairway Rd (PSE24). The site is presently in agricultural use and inaccessible from the strategic road network. However, at 25ha, without obvious physical constraints and very close to the motorway junction, it has many advantages and would be considered suitable for industrial employment uses.

South of the Borough

4.76 The Local Plan identifies:

- Land north of Harrowgate Drive (E/5f) – this site is now referred to as Interchange, where all but two-thirds of a hectare has been recently completed. Design and build opportunities remain on the remaining land.

4.77 The Core Strategy identifies two SUE sites:

- The Birstall SUE (including CS20) is strategically well located for the A6/A46 junction and M1 beyond, and proposes around 15ha of the 200ha site for employment land. Immediately to the south of the A46 is the successful Interchange site. This location is likely to prove of interest for employment use, but particularly to logistics operators of all sizes.
- Land north east of Thurmaston (including CS19) identifies a total area of 320ha of which 12ha in two small and one larger parcel are identified in the Plan. All the parcels will require improved transport infrastructure before they can be delivered

4.78 The current access constraints mean neither SUE is capable of delivering the need for a range of small to medium sized industrial units in the short term.

4.79 Watermead Business Park has planning permission for up to 150,000 sq ft of industrial units (phases 2 & 3), and we consider this to be a suitable use for this location. However, there is no certainty that the site will come forward for that use with more office and or storage and distribution possible additions/alternatives. Indeed a recent screening application refers to a broad range of employment uses, but does not refer to light industrial.

Rural

4.80 The Local Plan identifies:

- Extension to the Hayhill Industrial Estate, Barrow upon Soar (E/5a) – which was completed some time ago.
- Granite Way, Mountsorrell (E5d) – the northern most parcel has been developed for office use, and the rest of the site remains in use as the municipal recycling centre and depot.
- Land at Rothley Lodge, Rothley (E/5e) – has seen warehouse/manufacturing development on the majority of the site, but 5.6ha remains available for development. The undeveloped site has recently been acquired with the publicly stated intention of development for manufacturing and light industrial uses.

4.81 The Warren Industrial Estate, East Goscote has planning permission for expansion that is likely to come forward soon, but the site has no further scope for expansion given its constrained immediate surroundings.

4.82 Land adjacent to Rearsby Business Park was identified through the call for sites as an opportunity to expand the employment provision (PSE268&349). This is an isolated rural business location, but which appears to function extremely well, and could provide some relatively small scale, but much needed small to medium sized industrial units in the short term. But this would be in excess of the defined HEDNA need discussed in the next section(s).

Comment on developers

4.83 Some developers do take a longer-term investment approach, and have been able to make development viable, where institutional developers who take a shorter term view have not. The evidence indicates that taking a longer term investment approach can allow opportunity to build quality units albeit with higher builds costs. There are a number of estates in the South of the Borough, so built and that are generally full and easy to let. The downside of this approach is that the longer term view generally means the developer retains ownership, thus not affording occupiers the sought after ownership opportunity.

4.84 There are also examples of successful development in rural areas for example in Hathern and Barrow upon Soar. These rural locations are often suitable for SME occupiers as long as they fulfil basic requirements – suitable road connectivity being the prime requirement. Agents report that there may be opportunities for some further industrial development in rural locations along with cross-subsidising residential.

Rents

4.85 Agents report that there is so little availability in the Borough, it is currently very much a 'sellers' market' when setting rents. Generally, SMEs considering relocating are not prepared to pay much more than they already paying; but they are prepared to compromise on the quality of the accommodation to reflect the rent. Medium sized occupiers (plus 5,000 sq ft) looking to expand, require better quality units and are prepared to pay higher rents.

4.86 There is limited new build stock in the Borough. Interchange is the most recent and agents report that they have achieved £7 psf for the smaller units.

4.87 For the best quality second-hand stock in the Borough agents report headline rents at:

- £5 - £6 psf (sized 500 – 3,000 sq ft)
- £4 - £5 psf (sized 5,000 – 15,000 sq ft)
- £3 - £4 psf (15,000 sq ft plus)

4.88 As noted earlier in this report there is strong demand for freehold properties, especially with smaller units. Agents report capital values for new build units of between £95psf - £115 psf. Capital values will vary depending on the size, quality and location of the development. Furthermore, values will vary depending on the level of fit out sought by an occupier. For example, unit disposed of as core and shell will achieve less compared to a unit fully fitted out.

4.89 At these rents and capital values development is marginally viable for some developers. The traditional "in and out" developers that dispose of development quickly on completion will not be able to make development viable at such rents/capital values. However, there is evidence that developers who take a longer-term investment view can make development viable.

Industrial Market Summary

4.90 Overall the industrial market in the Borough is tight with very low availability. Agents report vacancy is at its lowest since the financial crisis in 2009. Highest availability is in the South of the Borough, closest to the City of Leicester. The south is also where the bulk of new development has taken place in recent years. In Shepshed and Loughborough in the north of the Borough, there has been limited new space built out, which when combined with good levels of demand has resulted in availability decreasing to the current very low levels.

4.91 Agents report that, in their opinion, a lot of secondary industrial stock has been lost in the Borough in recent times. They also think that there is more coming through the planning pipeline, and this has tightened the lack of availability. Agents are of the view that the market is so tight that no further secondary industrial stock should be released. Indeed, it is the case that the vacancy levels are so low that it will be inhibiting the ability of businesses to operate effectively and efficiently in the Borough because some will be occupying premises that are unsuitable for their needs and other growing businesses will be unable to find suitable premises in the Borough to accommodate their expansion needs. The overall effect of this supply imbalance will be to constrain business and jobs growth, and potentially lead to businesses relocating outside the Borough.

4.92 In the short to medium term there is an acute need for industrial space, fuelled by strong demand and low vacancy. Current allocations are unlikely to relieve pent up demand in these time scales, as the land in the SUEs and the EZ site are strategic longer-term allocations.

4.93 Demand is greatest for small and medium freehold units but there is almost no matching supply. This is partly driven by Self Invested Pensions (SIPS) but also because many occupiers prefer the security and flexibility of a freehold property. However, most landowners, those in control of allocated sites and established estates, are generally unwilling to offer freehold to meet this demand. They instead choose to retain greater control over the land and property.

The office market

4.94 Typically, new office development is financially viable in major towns and cities. Generally, new development requires a pre-let in place to a blue-chip covenant – i.e. on a long lease to a high-quality tenant that is likely always to pay its rent and adhere to its obligations. This structure gives sufficient security to the investment to enable funding to be obtained.

4.95 There is evidence of speculative office building in London and key regional centres where there is very strong office demand. Key regional centres where speculative office building has occurred is in the Thames Valley, and cities such as Birmingham and Manchester.

4.96 In recent years the main drivers of demand for new office space has been from the finance, professional services and Technology, Media and Telecommunications

(TMTs)sectors. Since the referendum to leave the European Union there has been a slight cooling of office demand from finance and professional services, but demand from TMTs remains robust.

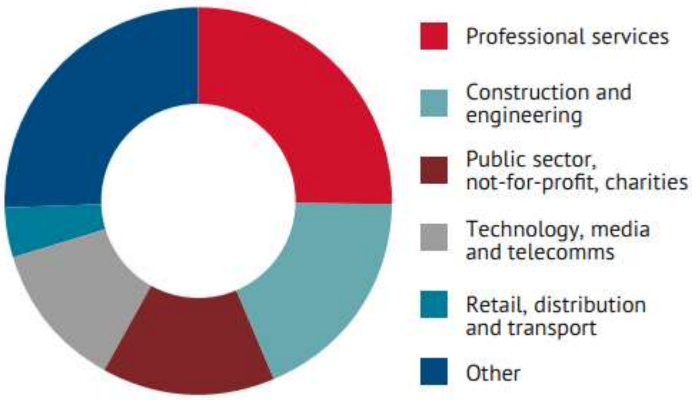
Charnwood as an office location

4.97 In the East Midlands region, the core office markets are found in the cities of Nottingham, Leicester and Derby. These areas attract demand from some national professional services, that require a regional presence, and regional and local based companies. Lambert Smith Hampton[12] quote prime rents as £19.75 psf for Nottingham, £17.50 psf for both Leicester and Derby. Charnwood comes within the influence of the Leicester office market with the fringe of the urban area over-spilling into the Borough.

4.98 Leicester is dominated by engineering companies, public sector services and professional services, with both office and industrial occupiers in the city. Traditionally the East Midlands has less blue-chip professional services than the UK average.[13]

4.99 The office sector in the South of the Borough is heavily inter-related with the Leicester City market. Take-up in the City peaked in 2015, but was down by half in 2016. Currently take up in 2017 has been subdued, with the first quarter down a further 30% on 2016 levels[14]. Figure 4.7 shows take-up by sector in Leicester City. The largest office take-up is from professional services followed by construction and engineering. The City, like much of the UK is seeing a growing professional services sector.

Figure 4.7 Leicester office take-up by sector - past 12 months



Source: Lambert Smith Hampton (2017)

4.100 Leicester City is reported to be one of the only areas in the East Midlands to have seen an increase in office supply in recent years, most noticeably in out of town office parks such as the Watermead Business Park. Watermead is smaller than

[12] LSH, 2017, *Office Market Report: Midlands Engine*

[13] Ibid

[14] Ibid

comparable development elsewhere in and around the City such as at Junction 21 of the M1, and has less of a range of unit types and occupiers.

4.101 The office market outside of the South of the Borough, i.e. in Loughborough, Shepshed and Rural Charnwood, is smaller and focused on local services. As a result, the office market in these areas is secondary; attracting different occupiers than the Leicester City market. The majority of office space in the north of the Borough is located in Loughborough town centre. There are some examples of purpose built offices parks i.e. Bank Court, but less than in the South of the Borough.

Demand

4.102 Agents report that there is no one sector driving demand, but the South of the Borough is where there is most demand for space. There are examples of corporate companies with space in the South of the Borough, but these typically have historic links to the area e.g. Dunelm Mill and Flo Gas, at Watermead Business Park. The rest of the Borough's office market is on a smaller scale and demand tends to be from existing businesses already located in the area. These businesses tend to want to relocate locally to help with staff retention. Occupiers looking for space in the north of the Borough are usually professional services, such as solicitors and accountants, servicing their local market. Agents report that Charnwood does not pick-up footloose regional or national requirements.

4.103 Table 4.12 shows between 2013 and 2016 annual office take-up averaged 40,101 sq ft across 70 transactions. In 2017 take-up is slower than for 2016 and 2015. Generally, take up is reasonably steady but in 2014 there was considerably lower take-up compared to other years.

Table 4.12 Annual offices take-up, 2013-17

Calendar Year	No. of transactions	Total take-up sqft
2013	14	60,257
2014	8	9,472
2015	24	41,775
2016	17	48,901
2017	7	9,871
Total	**70**	**170,276**
Annual average 2013 - 2016	**16**	**40,101**

Source: EGi, 2017

4.104 Table 4.13 shows that 60% of transactions since 2013 were in the size range of 1,001 sq ft – 5,000 sq ft, with 30% up to 1,000 sq ft. There have only been five registered transactions over 5,000 sq ft since 2013. This coincides with agent views, who report that the focus of the market is on smaller units.

Table 4.13 Office take-up by size, 2013-2017

Size range	Total No of units	% of units by size range
up to 1,000 sqft	22	31%
1,001-5,000 sqft	43	61%
5,001-20,000 sqft	3	4%
+20,000 sqft	2	3%
Total	**70**	**100%**

Source: EGi, 2017

4.105 Due to the small nature of the office market in the Borough, the EGi data is unlikely to capture all office deals over this period, but does provide a high-level indication of the size of units and the amount being taken-up.

4.106 Agents report that occupiers typically look for short term leases, usually with regular breaks giving tenants flexibility. A number of local business have a preference for freehold properties. Often this is down to the long-term security provided by owner occupation.

4.107 In Loughborough, office occupiers prefer locations in the town centre where shops, services and amenities are available to staff. In the South of the Borough, modern high specification out of town estates like Watermead Business Park are attractive to occupiers. In all locations sufficient car parking is the key requirement, and occupiers will target premises where this exists.

4.108 In the north of the Borough, around Loughborough, occupiers require small units, up to 2,000 sq ft. In the South of the Borough occupiers will take slightly larger units, up to 5,000 sq ft. Requirements for 5,000 sq ft+ are rare; smaller requirements are much more the focus of the market.

4.109 Agents report that overspill from Leicester City is quite modest in scale. Businesses tend to look for space in Leicester City centre, or near Junction 21 of the M1, and only when these are exhausted are they likely to consider locations in the South of the Borough. This hierarchy of search is borne out by the generally longer void periods in the South of Borough compared to equivalent units in Leicester City or around Junction 21 of the M1.

Supply and market balance

4.110 Table 4.14 shows that there are 27 units available in the Borough providing a total floorspace of 180,000 sq ft. This is against a total stock of 592 units / 1.3 million sq ft. The current vacancy rate for the Borough is 13.8% of floorspace, and 4.6% of number of units. If we cross reference the availability with annual take-up in Table 4.12 the availability across the Borough equates to 1 year 8 months' supply in relation to number of units, and 4 ½ years' supply in relation to floorspace.

Table 4.14 Availability of industrial space

Total Stock	1.3 mil sqft	592 units
Availability	180,000 sqft	27 units
	13.8%	4.6%

Source: EGi, VOA, AspinallVerdi

4.111 Vacancy in terms number of units is reasonable, but in terms of floorspace is high. Due to the relatively small office market in the Borough, vacancy of floorspace could be misleading as a few larger units can impact the vacancy rate significantly. To better understand availability/vacancy, further analysis within the property market areas is provided below.

Loughborough

4.112 Table 4.15 shows that there are 13 units available against a total stock of 255 units, equating to a vacancy rate of 5.1% of units. Nearly all (93%) the stock in Loughborough is under 5,000 sq ft. In this size range there is a total of 10 units available, a vacancy rate of 4.2%.

4.113 Above this size range, the total stock figure is low, therefore analysis of vacancy rates is not helpful. The vacancy is just three units above 5,000 sq ft, which is not critical given this is where there is least demand.

4.114 Overall our assessment of vacancy suggests the office market in the Loughborough is generally in balance.

Table 4.15 Loughborough office stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	130	51%	2	1.5%
1,001-5,000 sqft	108	42%	8	7.4%
5,001-20,000 sqft	13	5%	2	15.4%
+20,000 sqft	4	2%	1	25.0%
Total	**255**		**13**	**5.1%**

EGi, VOA, AspinallVerdi (2017)

Shepshed

4.115 Table 4.16 shows that there are only two units available against a total stock of 41 units. Despite just two units being available in this is not a concern, because the total stock figure is relatively low, and it is not a recognised office location for the Borough.

Table 4.16 Shepshed office stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	25	61%	2	8.0%
1,001-5,000 sqft	14	34%	0	0.0%
5,001-20,000 sqft	1	2%	0	0.0%
+20,000 sqft	1	2%	0	0.0%
Total	**41**		**2**	**4.9%**

EGi, VOA, AspinallVerdi (2017)

South of the Borough

4.116 Table 4.17 shows that there are seven units available against a total stock of 150 units, equating to a vacancy rate of 4.7%. Again, nearly all (90%) the stock is under 5,000 sq ft, but this is the band where there is the greatest availability and greatest demand. There is a total of five units available between under 5,000 sq ft with four units under 1,000 sq ft.

4.117 As with Loughborough, the stock level above 5,000 sq ft is low, therefore the two units currently available leads to a distortion of the analysis of vacancy rate. A vacancy of two units above the 5,000 sq ft less significant in the South of the Borough given the weak demand for this unit size.

4.118 Overall, again our analysis of vacancy shows that the office market in the South of the Borough is generally in balance.

Table 4.17 South of the Borough office stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	85	57%	4	4.7%
1,001-5,000 sqft	50	33%	1	2.0%
5,001-20,000 sqft	10	7%	0	0.0%
+20,000 sqft	5	3%	2	40.0%
Total	**150**		**7**	**4.7%**

EGi, VOA, AspinallVerdi (2017)

Rural Charnwood

4.119 Table 4.18 shows that there are five units available against a total stock of 146 units, equating to a vacancy rate of 3.4%. Virtually all (96%) of units in the area are under 5,000 sq ft, with around 60% under 1,000 sq ft. The majority of vacancy is under 1,000 sq ft with four units available in total.

Table 4.18 Rural Charnwood office stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	84	58%	4	4.8%
1,001-5,000 sqft	55	38%	1	1.8%
5,001-20,000 sqft	5	3%	0	0.0%
+20,000 sqft	2	1%	0	0.0%
Total	**146**		**5**	**3.4%**

EGi, VOA, AspinallVerdi (2017)

Recent developments

4.120 The most recent office developments in the Borough are Interchange at Birstall and Watermead Business Park; both are located in the South of the Borough. Construction began on the Interchange development in 2012, with units from 1,250 sq ft. Agents report that though surrounding land had originally been set aside for offices in future phases of development, the developer currently has no plans to build out more office units.

4.121 Watermead Business Park is a high quality development. Watermead has built out over a number of years, part speculatively, but the pace dictated by the wait for quality occupiers. Mirroring the position with regard to industrial development, because the developer is a long-term investor they have been able to build high quality and to make the scheme commercially viable. Given the build quality and rents achieved the development would not be commercially viable for a traditional “in and out” developer.

Development opportunities

4.122 Agents report there would be occupier demand for new build space in the South of the Borough, but not in the north. Generally, it would be too much risk for a developer to build anything larger than 5,000 sq ft. Even up to 5,000 sq ft there is the risk of long voids with rents needing to be discounted to lease units. Agents’ view is that development in the Borough should focus on delivering new industrial space, even in employment areas previously allocated for offices.

Rents

4.123 There is considerable variation in rents throughout the Borough. In the north around Loughborough rents are generally lower. With the one more modern office park style development, Bank Court, in the town being marketed at a premium rent of circa £18 psf. Rents can be as low as £7 for poorer quality secondary stock in and around the town centre.

4.124 In the South of the Borough, closer to Leicester City rents are generally higher. Agents report that the Watermead Business Park achieves the highest in the Borough at circa £19 psf.

4.125 However, even with rents at £19 psf agents' view is that development in the Borough is not viable. Rents would need to be closer to £25 psf to be viable, but even then, they require a pre-let on institutional lease terms to a blue-chip covenant. Rents would need to be closer to £30 psf to stimulate a speculative market.

Conclusion: the office market

4.126 Currently, even in areas of the Borough achieving the highest rents development is not viable. In recent years build costs have risen faster than rents, and this has meant that schemes that were previously proposed can no longer be viably built out. This is seen with developments like Interchange at Birstall, which had initially proposed further phases of office development. New office development is unlikely to be built in the Borough in the short term as developers will struggle to make it viable. Only developers who can take a long-term investment view are able to make office development viable in the Borough.

4.127 Evidence does not support allocating new land for office development in Charnwood. In fact, agents report that the focus should be on the industrial market, where availability is lower and development is closer to being viable. The focus for office growth should be on refurbishment of existing stock, and if the developer is willing, the continuation of new office development at Watermead Business Park.

Headlines across market types

4.128 When looking at new land, or simply how allocated sites should be brought forward, the key message from this analysis, covering both the office and industrial market, is that:

A) Demand is strongest for smaller and medium sized units. Larger unit demand is driven by specific occupier requirements.

B) Viability to deliver new leasehold space remains challenging in the short term. In the current market, only developers taking a long term view of the market are willing to deliver space.

C) There is a general lack of freehold property but buoyant demand which is not being met by the current mix of property available.

4.129 For the Council, the immediate short term problem is that there is limited viability to develop out the new allocated sites as leasehold units. For industrial users, this is an immediate concern given the low levels of vacancy in the built stock; which agents report is harming the efferent working of the market.

4.130 The viability of the freehold market works differently to leasehold, with owners taking a much longer term view and with an added incentive to invest in property (SIPS). But that market is not being catered for on the allocated sites available now or from the built stock. Neither space nor land is being offered freehold.

4.131 There is therefore an immediate and short term need to boost to stock of floorspace and partially where freehold property is promoted.

4.132 Although viability is challenging it has not always been the case that space has been unviable to deliver. And even in this generally unfavourable market some developers are able to deliver new space where they take a long term view. A more optimistic long term view dovetails with the positive outlook presented in the HEDNA. The HEDNA requires Charnwood to plan for more land, not less.

4.133 At least in the short term, to stand the best chance of being taken up by the market new space should generally be specified to meet the needs of cost efficient local firms in smaller and medium sized units. Ideally freehold, although many owners will be reluctant to offer to sell sites and prefer to wait until the leasehold market improves.

4.134 Because the market considers that there is stronger demand for industrial space, as opposed to offices, to stand the best chance of success sites should be promoted flexibly – even where they may nominally be allocated or justified for either offices or industrial. For office sites, active consideration should be given to flexibly designed B1(c) units that can be used by either office occupiers or light industrial uses; by for example, by adding or removing mezzanine floors.

4.135 Finally; the analysis and particularly the low industrial vacancy rate, demonstrates that property capable of occupation should not be released from the supply – even though there is a supply of development land. Undeveloped land is not an adequate substitute for an occupier who is seeking built floor space. Only when vacancy rates improve should consideration be given to releasing built stock.

5 THE DEMAND FOR OFFICE LAND

Introduction

5.1 The previous chapter looked at the need for land as expressed by market agents and related analysis.

5.2 The HEDNA study provides the Borough with a framework setting out how much new land is needed. This quantum has been aligned to the recommended housing number.

5.3 However, for this ELR, some more work is needed to translate the HEDNA number into a demand for land in the new plan. This is because, as a strategic study, the HEDNA was unable to assess the qualitative need for land in the Borough including the type of land (or space) most in demand nor where in the Borough this should be provided. So, we can add an additional dimension drawing on our more detailed analysis.

5.4 Work is also needed to refine the demand for office space because the HEDNA provided Charnwood with a broad range with the maximum number roughly double the minimum.

5.5 In the rest of this chapter we look at the demand for office land.

The HEDNA Range: 17-40ha

5.6 The HEDNA provides Charnwood with a range of office demand. Over the period 2011 – 2036 this ranges between 17.2ha and 40ha. The reason for this broad range is that the two numbers are developed from different, and incompatible methods. We discuss these in more detail below, but in summary the higher number is an amended economic forecast, adjusted to reflect planned policy interventions, the lower is a projection of past take-up.

The Planned Growth Scenario – 40ha (2011-36)

5.7 In common with most ELRs the HEDNA starts its analysis from the job forecast. In this case one prepared by Oxford Economics in 2016.

5.8 The baseline growth scenario (table 17 & 18 of the HEDNA) shows total job growth in the district increasing by 12,900 jobs (2011-31) or 13,200 (2011-36). The very slow growth post 2031 is explained as a product of an ageing population.

5.9 However, the HEDNA then goes on to dismiss this baseline forecast and does not carry this forward into its recommendations. The report explains that the baseline forecast:

> *"is a good indication of the direction of growth for each local authority. However, it does not reflect any planned/committed investment, a matter including both bricks and mortar development, nor investment in specific companies, which may not require additional floorspace."*

5.10 In response to this matter, the HEDNA proceeds to develop a higher forecast, based in the Oxford Economics baseline, but amended to reflect several committed (or firmly planned) interventions. This new scenario is called the 'Planned Growth Scenario'. For Charnwood, these adjustments are set out at paragraph 4.25 of the HEDNA as:

> **Charnwood** – The Loughborough and Leicester Enterprise Zone aims to create nearly 21,000 new jobs over the next twenty-five years. We have not included all of this within the Charnwood and Leicester planned growth scenarios just two smaller parts of the wider EZ which have planning permission. The former Astra Zenca site is the focus for scientific and pharmaceuticals uses. There are also a number of other developments in the pipeline including Harrogate Drive, which is an office based development and the Watermead Regeneration Corridor which is expected to be developed in two phases with the first, an office based development and the second, larger, site delivering jobs across a range of uses including B1/B8/C1/A1-A5.

5.11 The result of these adjustments is that the Planned Growth Scenario (40ha) provides for roughly 50% more job growth than the baseline. The forecast is 5,300 jobs higher over the period 2011-36. This is an increase from 13,200 to 18,500 (Note table 20 of the HEDNA is incorrect and mistakenly presents the difference as 5,600 jobs[15]).

5.12 However; one complication for the emerging plan is that the HEDNA reports that most the job growth has already taken place. It does not, at 2018, require new sites or floorspace.

5.13 Table 24 of the HEDNA report (reproduced below) provides a breakdown of the planned growth scenario by different timetables. The HEDNA notes that this data is set out to help Councils progress their development plans. The table shows that of the 18,500 new jobs required in Charnwood to meet the scenario more than 50% had already been delivered by 2015.

5.14 The table shows that between 2011-15 Charnwood added 9,600 new jobs leaving only 8,900 remaining to meet the scenario in full.

[15] Table 20 transposes baseline growth 2011-31 and 2011-36 and proceeds to calculate the difference between baseline and planned growth scenarios using the erroneous baselines.

Table 5.1– HEDNA estimate of total jobs growth

	2011-2015		2015-2036	
	Job Growth	Percent of forecast period	Job Growth	Percent of forecast period
Charnwood	9,600	51.9	8,900	48.1

Table 24, HEDNA, GL Hearn 2016

5.15 The report does not update the demand for land post 2015. But given the Borough delivered less than 3ha of new office land between 2011-15 these jobs must have been absorbed into the existing stock and did not require new land or floor space.

Where have the jobs gone if Charnwood did not deliver the land?

5.16 There are two likely reasons for this space-less growth. Firstly 2011 was a low point of the economic cycle and many firms were under occupying their space compared to the peak of the cycle. This space was re-occupied as the economy recovered between 2011-15. Another factor is likely to be that firms reconfigured their space as the economy recovered; to make more efficient use.

5.17 For the ELR a further complication, aside from providing land for jobs already successfully delivered, is that this scenario is efficiently 'chicken and egg' or an example of circular logic. In this case the uplift in jobs in the Planned Growth Scenario is justified by several policy interventions; but in the case of Charnwood Borough these interventions have associated development sites. Further, in the case of the former Astra Zeneca site (part of the EZ) there is a large quantity of vacant floor space which the Council hopes will be re-occupied. So, for Charnwood, the interventions don't need new sites or land allocations.

5.18 For these reasons, we treat the 40ha 'need' number with caution. In the Charnwood, new land of this scale is not needed to deliver the number of jobs in the scenario.

The Past Completions Scenario – 17ha (2011-36)

5.19 The bottom of the HEDNA range for offices is set by a Past Trend Scenario (Past Completions). This projects forwards completions data from 2011-15.

5.20 For Charnwood this generates a need for 17.2ha of office land (including. B2(b)) over the period 2011-36. As the report explains this also allows for a 5 year 'margin' to allow for choice and flexibility. So, the take-up over the period 2011-36 is expected to be around 14ha (0.6ha per annum). This aligns with the most recent Council monitoring data that shows take-up of 3.35ha since 2011[16] , and which we round to 3.5ha.

A pragmatic way forward

5.21 The range given in the HEDNA for new office land is between 17-40ha over the period 2011-36.

5.22 The 40ha is not justifiable for Charnwood given that many of the jobs have already been delivered. But also, logically the high scenario was justified to deliver the Enterprise Zone and Science Park and both of these already have allocated sites which, as part of this review, we do not question given they are committed and funded[17]. So new sites are not needed to accommodate this high growth scenario.

5.23 For this reason, we suggest taking forward the lower 17ha scenario as the best estimate of more 'normal' (local) demand in the Borough.

5.24 This also aligns with our market consultation that suggested the 40ha was not realistic for the market to deliver. Updating this scenario to take into account land delivered between the HEDNA base data (2011) and 2017 reduces the 17ha to a rounded 14ha.

[16] The 3.35ha office completions identified by Council monitoring data comprise: Birstall Interchange 1.7ha, Watermead 0.83ha and the 0.82ha Science Park extension. We exclude land at the Science Park (and EZ) from both our need and supply calculations, but we include the 0.93ha taken up since 2011 at Watermead by the Dunelm car park extension. The completions figure carried forward in the supply calculations is a rounded 3.5ha.

[17] Note – even if this were not the case then the logic to increase the job numbers would fall away.

6 THE DEMAND FOR INDUSTRIAL LAND

Introduction

6.1 In accordance with the PPG the HEDNA uses a number of different approaches to assess the need for new industrial land. Whilst these different approaches are included within the guidance, they are not compatible with one another.

6.2 For non-strategic industrial and warehousing, defined as units below 9,000 sq m, the report uses both a labour supply model, drawing on economic forecasts, and a projection of past completions.

6.3 For strategic warehousing, which is defined as any demand for a unit in excess of 9,000 sq m, a different approach is used.

6.4 To ensure that this report addresses demand for the full market we need to consider both elements of the HEDNA.

The Demand for Non-Strategic Industrial Land (<9,000 sq m)

6.5 For non-strategic industrial and warehousing (units <9,000 sq m) the report uses both a labour supply model, drawing on economic forecasts, and a projection of past completions. However, unlike offices where a range is suggested, for industrial uses a single scenario (past completions) is preferred.

6.6 The justification for adopting a single scenario is that the labour supply approach shows almost no new floor space is needed in Charnwood. This is because the forecasts expect almost no increase in the B2 or B8 employment sectors (Table 75). But the forecasts still show increasing GVA which the HEDNA uses to evidence the fact that, regardless of job change, more new land is needed.

6.7 Setting aside the labour supply scenario the HEDNA recommends providing land in line with past trends. For Charnwood this is estimated at 26ha for industrial users (B2) and 13ha for smaller warehouses below 9,000 sq m.

6.8 While the HEDNA presents these separately as two distinct targets our market consultation, and site inspections, show that this is an artificial distinction. In Charnwood smaller warehouses and factories share near identical property and location requirements. So, in the rest of this report we simply use 39ha as the base need for non-strategic industrial land.

6.9 As with offices we update this number to 2017 by making an allowance for completions since 2011. In this case the Borough gained 4.6ha of industrial land at three sites (Interchange 3.33ha, 0.27ha at The Warren, East Goscote and 1.0ha at Loughborough Rd, Rothley. So there is 36ha still needed up to 2036.,

Local adjustments

6.10 As a strategic study the HEDNA is unable to fully consider local factors in Charnwood. As part of our work we have tested whether simply providing land in line with past take-up will meet the full market demand. This is fully in line with HEDNA where the report is clear that the 39ha, reduced to 34.5ha once take-up between 2011-16 is considered, must be treated as a minimum number[18].

6.11 The HEDNA report starts from the assumption that the market today is broadly in balance. But our work, particularly an analysis of existing vacancy rates, suggests that this is not the case.

6.12 Consultation also suggests that projecting forward past take-up may not fully reflect the demand for new space in Charnwood. This is because some consultees consider that the market has been undersupplied in the past; sufficient deliverable sites were not promoted in the previous development plan. Further, the strategy of promoting new employment sites within the large SUEs (with long lead in times) has contributed to a shortage of deliverable land over the period the HEDNA used to extrapolate past take-up.

6.13 One quantitative issue agents have referred us to is that current vacancy rates are around 3.7%, which they consider too low for the market to function efficiently.

6.14 A certain amount of vacant space `enables the market to function efficiency. This is to allow for occupiers to move between properties and the market to offer a choice of property when they choose to do so.

6.15 How much space is needed for 'market choice, churn and friction' is a matter of judgement. In our experience estimates vary between 5%-10%. For this study we have assumed vacancy should be in the middle of this range (7.5%). Reflecting the fact that vacancy rates are lower than 7.5%, and agents concerns that the HEDNA estimate of past take-up may be too low we propose a small adjustment to the demand estimate.

6.16 We estimate that 10ha of land would enable sufficient floor space to be accommodated to allow the vacancy rate to reach a 'healthy' 7.5%. Vacancy is currently 3.8% and so we allow for a further 3.7% (42,000 sq m) of the existing stock to bring vacancy back to a healthier 7.5%. This requires around 10ha at a 42% plot ratio[19].

Should an allowance be made for losses?

6.17 One obvious complication with the HEDNA past trends analysis is that its conclusion; that past take up is positive, contradicts official floor space data from the Valuation Office Agency.

[18] See Page 185 of HEDNA; third bullet point.

[19] As per HEDNA – A 42% plot ratio is used for industrial space.

6.18 This official data shows that Charnwood Borough lost around 140,000 square metres of industrial (including B8) floorspace between 2010/11 and 2015/16[20]. At a 42% plot ratio this would suggest 33ha of land was lost from the industrial stock (net) over this period. Because HEDNA uses a past trends approach when estimating the demand for new industrial land, it is inherent to the method that the losses also continue at the same rate as seen in the past.

6.19 As part of this study we considered whether we could provide a quantified estimate of how much land the Borough could release. But a number of factors suggest this would not be sensible as a planning strategy – at least in this plan review.

6.20 Firstly, agents report almost no frictional vacancy in the existing stock and very limited market choice. As noted above vacancy rates across the industrial stock are very low and should a firm be displaced because their existing site is released for an alternative use there are no (or very limited) alternative options to re-accommodate them within the Borough. This also suggests that at least some of the space lost in the past, should not have been because it was needed to function as part of the margin.

6.21 Secondly; agents report that much of the space lost in recent years related to underused or obsolete stock which was of limited or no value to the market. With nearly all sites occupied today the overarching conclusion from the agents is that all sites and property remaining at 2018 is fit for market and the rate of release or contraction in demand for secondary stock will be lower in the future.

6.22 Thirdly; in Chapter 3 we noted that economic forecasts still expect manufacturing to lose jobs but at reduced rate in the future. So this would suggest that we should be very careful about projecting past losses into the future.

6.23 Finally; new space cannot viably be delivered at the rents paid on the secondary market. For many firms the new land and floor space is not available to them and should their sites proactively be released they may cease trading.

6.24 The pragmatic response for the Council is that it may also be sensible to seek to retain sites in use through a criterion based release policy, and slightly overprovide new land compared to need, to provide a buffer for windfall losses. The scale of this small over provision is discussed in the conclusions.

Summary for Non-Strategic Industrial Land

6.25 The HEDNA report identifies a need for a further 39ha of new industrial land over the period 2011-36. As of 2017 4.6ha of this has been delivered, meaning 34.5ha is outstanding. But as noted above, HEDNA assumed the market is generally in balance. But our analysis and consultations suggests that this is not the case. Most obviously vacancy rates in the existing stock are too low for the market to function

[20] VOA Floor space statistics reported a stock of 1,269,000 sq m in 2010/11 falling to 1,132,000 in 2015/16.

efficiently. In response we made a further allowance of 10ha of land which, if developed, will allow the vacancy rate to revert to a more 'healthy; rate.

6.26 So we recommend that the Council provides for at least 44.5ha of new land for non-strategic industrial uses.

The Demand for Strategic Industrial (Warehousing) Land

6.27 Above we have noted that the HENDA recommends 39ha of new (non-strategic) industrial land is provided in Charnwood between 2011-36.

6.28 For the Borough it is important to note that when estimating this 39ha the HEDNA Consultants removed from their analysis consideration of the need for any large warehousing units over 9,000 sq m.

6.29 For larger unit demand the HEDNA only presents a county-wide need for a minimum of 472ha of new land and unlike non-strategic industrial (<9,000 sq m units) no district breakdown is provided.

6.30 For Charnwood, a failure to provide any land in response to this 472ha HEDNA figure would mean that an element of market demand is unaddressed in the next plan. This is because within the 39ha, there is no 'room' for even a single new large warehouse unit over 9,000 sq m. That is regardless of whether the demand is generated by local (to Charnwood) firms growing or consolidating from smaller units into one large unit, or footloose demand. Given that HEDNA is silent on how much new land Charnwood should provide we need to form a view here.

6.31 There is no market evidence that there is strong demand for footloose strategic warehousing, such as the format of Magna Park (Harborough district) in Charnwood. This type of footloose demand has previously been accommodated in other Leicestershire districts where the availability of highly accessible land is better.

6.32 But we cannot set aside the prospect that local Charnwood business will generate a demand for large units over the life of the plan. Because the HEDNA excluded all large units, regardless of whether the demand was generated by a local firm or footloose strategic warehouses from the assessment of 'Industrial' land we need to make some small allowance for this market.

6.33 Given we have identified only 16 units larger than 9,000 in Charnwood today it is clear that the locally driven need for new land here will be modest.

6.34 In our view, 10ha is the smallest practical size for a site accommodating large warehousing units. An additional allowance around 10ha would accommodate, at most, 4 larger units of 10,000 sq m (a 20% growth over the plan period) or fewer if the footprint was larger. It would therefore appear reasonable to identify a site of the minimum site size of 10ha to meet this demand. This size of site is commensurate in scale with Charnwood's local market, but not of the size to cater for regional, sub-regional demand.

6.35 In line with HEDNA, where the County-wide estimate of 472ha is clearly expressed as a minimum[21] then Charnwood also needs to consider this estimate a minimum number.

We recognise that that Charnwood Borough Council will need to agree the distribution of strategic B8 uses with its partners under the Duty to Cooperate, and the findings in this report are intended to inform that discussion.

Summary

6.36 The HEDNA provides Charnwood with a 39-ha requirement for new industrial land. This is estimated by projecting forward past take-up – an approach supported in the Planning Guidance. The report dismissed a lower estimate calculated from an economic forecast. Again, this is supported in the planning guidance which states Plan Makers can adopt either approach 'and/or as appropriate' (2a 32).

6.37 HEDNA is however limited in being a strategic document and unable to fully consider local factors. In this regard, we have identified at least two quantitative factors which would suggest slightly higher provision is justified.

6.38 First is the very low vacancy rate in the existing stock and the fact that agents report that the market is 'too tight'. The market is not currently in balance. Additional supply is justified to remedy this. In addition, related to the low vacancy rate, agents report that past take-up has been constrained by a lack of supply. This may mean that the HEDNA past take-up estimates are too low and don't reflect full market demand. We estimate that around 10ha over above the HEDNA number is locally justified to adjust for this.[22]

6.39 Once an allowance for take up is made, 4.6ha since 2011, this leaves a minimum of 44.5ha of new land for 'non-strategic' industrial uses to be identified.

6.40 Secondly; the method used in the HEDNA to arrive at the 39ha makes no allowance for any larger (B8) units – regardless of whether these are demanded by local firms seeking larger units within the Borough or footloose demand from elsewhere. While our analysis largely dismisses Charnwood as a location for footloose demand there is justification to provide a small adjustment for local need. This is because we cannot discount the prospect that firms local to Charnwood will grow and demand larger units, or that firms will consolidate from smaller units into a large unit over the plan period. A further 10ha allowance would appear sensible to meet this local need.

[21] See paragraph 11.22 of HEDNA for example. "The MDS analysis considers the need for strategic distribution development across Leicester and Leicestershire. Its conclusions identify the following minimum need figure for employment land capable of accommodating strategic B8 developments of 9000+ sq.m / 100,000+ sq.ft."

[22] Vacancy is currently 3.8% and so we allow for a further 3.7% (42,000 sq m) of the existing stock to bring vacancy back to a healthier 7.5%. This requires around 10ha.

7 CONCLUSIONS & RECOMENDATIONS

Introduction

7.1 The Council has committed to implement the findings of the recent Leicestershire HEDNA. Our recommendations below flow from the HEDNA, but with some locally evidenced adjustments. This section draws on our site assessments and property chapter. We would suggest that the Council refers to the market analysis above when making detailed decisions about sites, applications and policy. It provides useful advice regarding the qualitative demand, rents and yields which cannot easily be transited into development plan policy.

7.2 In this section we suggest some sites that the Council considers to meet employment land needs, over and above those already allocated in the development plan. The reader is reminded that the ELR cannot allocate sites, nor consider factors outside out brief and narrow topic. The named sites may be unsuitable for allocation due to other reasons. They could also be substituted for other sites with similar characteristics. When looking for new sites it is the case that sometimes sites will not be promoted or assembled until after the need has been identified.

Offices

7.3 The HEDNA provides a range for future need of between 17.2ha and 40ha new office land (2011-36), and this study uses local intelligence to refine this further.

7.4 Note for strategic policy setting purposes we suggest rounding targets; because the data is not precise or scientific to identify need to one tenth (or less) of a hectare.

Quantitative target

7.5 Our analysis suggests that it is not appropriate to allocate 40ha of new land for offices in the new plan. This is partly because the data shows that the number of jobs driving this top end target have already, in the first five plan years, largely been delivered – without needing this new land. We think that this is the product of the study using a 2011 base date and the high number of jobs delivered between then and now as the economy recovered from the recession. Our market evidence also suggests delivering the top end of this range will be challenging; should sites be allocated at this scale there is a risk that land will not be taken up because jobs will be absorbed into the existing stock through higher worker to space densities.

7.6 Our analysis shows that, in line with the lower end of the HEDNA range we need to provide a minimum of 14ha of new land. This aligns with the HEDNA 17ha scenario - minus completions to date (3.5ha[23]).

[23] Completions are: 1.7ha at Interchange, Birstall (the majority of the development is industrial space) and 1.75ha at Watermead Phase 1

Sites to meet identified need

7.7 We have assessed the stock of new land intended for office development.

7.8 There is a supply pipeline of 17ha of new land; spread around the Borough. This excludes land at the Science Park and Enterprise Zone, which is intended to meet specialist employment needs.

Table 7.1 New Office Supply (as at 2017)

Site Name	Location	Ha
Pontylue Farm (Watermead Business Park Phase 1)	Syston	2.30
Watermead Business Park Phases 2 & 3	Syston	2.50
Interchange - Land north of Harrowgate Drive	Birstall	0.67
West of Loughborough Sustainable Urban Extension	Loughborough	4.00
North East of Leicester Sustainable Urban Extension	Thurmaston	3.50
Direction for Growth North of Birstall	Wanlip	4.00
Total		**16.97**

Source: CBC and PBA

7.9 The table shows that there is a very small oversupply compared to our estimated need for the Borough (14ha). But, this is not significant, and a small oversupply is helpful to manage the risk and uncertainty surrounding some of the sites and to plan for unforeseen losses as suggested in the HEDNA:

7.10 “These [figures in the HEDNA] should be regarded as minimum figures. The quantitative analysis does not take account of the potential ‘replacement’ demand for employment floorspace arising from the loss (planned or otherwise) of poorer quality stock” (paragraph 12.69 of HEDNA)

7.11 There do not appear to be any further locally evidenced qualitative adjustments to indicate the need to increase or reduce this number. Market demand for offices is weak, and the portfolio we suggest above should cover any qualitative gaps in the market; and allow a distribution of new land around the Borough to meet locally arising need.

7.12 Qualitatively we note that only land at Watermead and Interchange can be delivered in the short term. Watermead is one of the few locations which has a track record of delivering new, larger and higher quality office space for local firms. While in the longer term the SUE sites may also help meet this need, at least in the short term there is a strong rationale for keeping land at Watermead in the office supply.

7.13 When addressing detailed policies for these allocations we noted in the property market chapter freehold is the ideal product businesses seek. This is because occupier demand is especially strong for this product, and supply very short. Many developers or site promoters choose not to deliver freehold because they prefer to maintain control of their land and property assets. Knowing this, a commitment to deliver freehold should be given additional planning weight. Also the market preference is for smaller units and there is merit in seeking a flexible supply of space which can be used for light industrial or offices as market demand dictates at the time.

Recommendation: New land for office uses

The plan should seek to allocate a minimum of 14ha of new land to meet office needs up to 2036.

The sites in the above table (7.1) should continue to be allocated for employment use. Their re-allocation is justified to meet the HEDNA demand scenario for office uses and allow a small contingency in the supply.

To ensure flexibility in the supply, and allow the market to best respond to demand, policy should facilitate the delivery of B1c property where it can be flexibility designed to meet the needs of low cost office occupiers as well as light industrial use.

Science park and enterprise zone

7.14 In addition to the portfolio recommended above, the Council has a separate justification for the (continued) allocation of land at the Science Park and Enterprise Zone. These locations are not expected to meet the needs of the normal market, and should be considered separately. Qualitatively the continued allocation of these large sites to accommodate large scale demand in these key growth sectors, provides added justification that the portfolio above should be focused on smaller unit demand, which may include grow-on units for those outgrowing the Enterprise Zone sites.

7.15 Although outside the direct scope of this report we noted in our market assessment that there was a risk that a lack of grow-on (or spin off) property in the ‘normal market’ could hinder the full potential of the Science Park agenda. The general Loughborough estates are effectively full at the moment and they accommodate many firms who don’t appear to need or want space on a dedicated site but wish to locate in the general area.

7.16 We would suggest that consideration be given to whether the Enterprise Zone could accommodate this more general need for self-contained industrial property for these types of firms. There is a risk that the focus is on the ‘high’ end of the market and the less ‘shiny’ demand is left frustrated.

7.17 This need, or rationale, overlaps with our industrial conclusions below because and demand stimulated by the policy interventions could be across the use classes; i.e. either office of industrial in nature.

Existing office sites to be released

7.18 We have assessed the Borough's stock of sites and the detailed proformas are reported at Appendix A. There are no office sites recommended for release in the next round of the plan. However, we question the need to carry forward the allocation at Dishley Grange for employment uses.

7.19 Alternative supply is being provided as part of the nearby urban extension, and alternative sites provide sufficient land to meet the identified need.

7.20 As a minimum the Council, acting as the planning authority, should critically explore with the site owners why the land has not come forward and de-allocate the land should no commitment to deliver the land not be forthcoming.

Recommendation: Dishley Grange: The Council should consider whether the plan allocation at Dishley Grange should be allocated for an alternative use.

It is not needed to form part of the HEDNA alighted supply and may not come forward for employment development.

Offices – summary

7.21 The Council has sufficient land to meet identified need, but the risk to delivery will remain the challenging viability. In general, the demand we identified in our property market analysis is for small, cost efficient space. So this, using planning policy to secure the delivery of space, should be the policy focus.

Industrial

7.22 The HEDNA provides a recommendation for 39ha of 'local' industrial land. This includes smaller (non-strategic) warehouse uses as well as B1c and B2 uses.

7.23 No quantum of land at the Borough level is identified in the HEDNA for larger warehouses.

Non-Strategic Industrial Land (including small warehouses)

7.24 The starting point for the plan target is the 39ha cited in the HEDNA. We add a further 10ha to reflect the fact that we are not starting from a balanced market. Once completions are considered 44.5 ha of new land is needed for 'local' industrial and small warehouses.

Table 7.2 Recommended Employment Land Provision (2016-33)

HEDNA NEED	Ha
Need 2011 - 36 (HEDNA)	39.00
Updated to reflect completions 11-16	-4.60
Plus allowance for vacancy	10.00
Total recommended provision	**44.40**

Source: CBC and PBA

Identified Supply

7.25 The table below shows that existing allocations provide sufficient supply to meet this quantitative need which is distributed across all the Charnwood local market areas.

7.26 So, there is no need for additional allocations to meet this minimum target; as with offices there is a small quantitative oversupply (54.5ha supply compared to 44.4ha minimum need).

7.27 This provides a small contingency to allow for unforeseen losses from the supply (windfall losses) or to release poorer performing sites.

7.28 When viewing the significance of any ‘oversupply’ and the proportionality of seeking perfect quantitative alignment of it is worth remembering that the stock of sites is roughly 380ha of land today and growing as the additional land promoted in the HEDNA is delivered.

Table 7.3 New Industrial land to meet minimum need (2016-33)

Site Name	Location	Ha
The Warren	East Goscote	3.95
Land at Rothley Lodge	Rothley	5.60
Land at Loughborough Road	Rothley	2.99
Watermead Business Park Phases 2 & 3	Syston	9.50
West of Loughborough Sustainable Urban Extension	Loughborough	12.00
North East of Leicester Sustainable Urban Extension	Thurmaston	9.50
Direction for Growth North of Birstall	Wanlip	11.00
Total		**54.54**

Source: CBC and PBA

Sites possibly for release

7.29 In our assessment, we have concluded that the bulk of the stock of sites remains fit for purpose and in demand. However, there are cases where the Council may choose to release sites to facilitate regeneration and/or mixed use redevelopment. There is also scope to de-designate some poor performing sites.

7.30 As noted above there is a small oversupply compared to quantitative need with 54.5ha of development land identified to meet a HEDNA need of 44.5ha. So a maximum of 10ha could be released before new land needs to found.

7.31 Our site assessments have identified 5 poorly performing sites. Four are very small and total to 2.9ha:

- Albian Street (Anstey ID 10410)
- Charnwood Road (Shepshed ID 10411)
- Brook Street (Syston ID 10415)
- St Peters Wat (Syston ID 10418)

7.32 Only Charnwood Road was noted as being vacant. Our opinion is that should owners seek to release these sites then there is unlikely to be a reasonable prospect that they could be retained in the supply.

7.33 Consideration could be given to releasing the Earl’s Way Industrial Park (Thurmaston, 7.8ha ID 10358). Our assessment shows that the site is functional, but constrained by poor access. In the short term the site clearly meets a need and is well occupied; but over the longer term it may be policy preferable to release the site rather than encourage further investment in the employment stock here. Doing so in a planned manner may be preferable than entertaining a speculative planning application for release mid-plan.

7.34 As with the sites above Earl's Way is occupied at the moment and before releasing the site the Council would need to ensure that there is new (or alternative) property for tenants to move into. This would need to be a condition of any release because at the moment there is an oversupply of development land, compared to HEDNA, but not built floor space for occupation. An oversupply of undeveloped land is no substitute for a firm seeking floor space.

7.35 The total site area of Earls Way and the four sites discussed above is slightly in excess of the oversupply (10.8ha)

7.36 We also note that the Pinfold and Bridge sites have previously been promoted for release by their land owner. These are also older sites but, as with Earl's Way, well occupied. These sites are not as constrained as Earl's Way and the rationale for release over the long term may be to facilitate wider regeneration of the village and opening up the River Soar frontage. For our work, while not positively recommending seeking redevelopment and release, we note that should the Council seek in the new plan to regenerate the area the quantum of space needs to be re-accommodated on or off site. Given the demand for space is mostly industrial in nature then this is what should be sought as replacement. As with above, no release can or should be promoted until new floor space is provided for firms to move into.

7.37 Finally, although there is enough supply to meet identified needs it is unlikely that the allocated supply in Table 7.3 will meet the qualitative demand for new freehold units. As noted in our property market review there is very strong demand for smaller freehold industrial units, but no supply. This is a common market deficiency because most owners wish to keep control of their sites and only offer space leasehold.

7.38 So there is a qualitative rationale to seek additional allocations; where they are promoted for small freehold units. Any additional supply can be used to offset losses in addition to the 9ha discussed above. But we note that there are strong qualitative grounds to promote some new freehold land regardless of the quantitative balance. While alignment with HEDNA housing numbers remains a concern today, the emerging NPPF / PPG should reduce the risk that an aspiration to deliver a different quality and type of product to match identified market demand could render the plans housing numbers unsound.

Recommendation: Industrial and small scale warehouses

The plan should seek to allocate a minimum of 44.5ha of new land to meet the need of industrial users and small warehouses.

The sites in the above table (7.3) should continue to be allocated for industrial uses. The re-allocation is justified to meet the HEDNA demand scenario for industrial land uses and allow a small contingency in the supply.

Should land be promoted which will be available for small and medium sized freehold units there is a strong qualitative case to exceed this minimum figure.

There is some limited scope in the supply to release a limited number of poorer sites in the stock. But only when the Council is satisfied that there is alternative built property (as opposed to land) for these firms to occupy elsewhere.

To ensure flexibility in the supply, and allow the market to best respond to demand, policy should also facilitate the delivery of B1c property where it can be flexibility designed to meet the needs of low cost office occupiers as well as light industrial use.

Large Unit Demand (Strategic Warehouses)

7.39 Above we noted that the HEDNA assessment method excluded any large warehouse unit, over 9,000 sq m from the analysis of industrial and (small) warehouse demand.

7.40 As such there is no provision within the 39ha (adjusted to 44.5ha above) to accommodate any large warehouse unit. That is regardless of whether this demand is from local firms seeking to consulate a number of small units into one large unit or demand new to Charnwood.

7.41 To reflect this omission, we suggest a small additional quantum of land to reflect the likelihood that there is likely to be some limited, local demand, for larger units over the life of the plan. We estimate that minimum of 10ha should be provided.

7.42 To meet this need we suggest that consideration could be given to allocating a site with very good accessibility to the strategic road network, ideally the M1, in order to meet this demand. None of the sites in the table above (7.3) appear to have this excellent level of strategic road access. The larger employment allocations in the SUEs were originally justified to meet local needs and provide balanced communities; not meet strategic employment needs of this type. So this would suggest looking for a new site.

7.43 From the SHELAA we note that one highly accessible site was promoted East of Shepshed in very close proximity to Junction 23 (PSE24).

7.44 We suggest this is explored further and that around 10ha would be sufficient and reasonable to meet any local need for larger units. We note that another site, to the south east of the junction was also promoted. But our view is that this could, over the long term be better used for long term science park related development; hence our preference for PSE 24.

7.45 As part of any new allocation it would be sensible to also consider some smaller units which would address the qualitative deficit in Shepshed. We noted in paragraph 4.67 above that agents reported a shortage of smaller units in the Shepshed market and no supply. None of the sites listed in Table 7.3 are in Shepshed, and the only site in the north of the Borough is land at the Loughborough SUE (or Science Park and EZ). It would be a reasonable expectation that any new allocation, even one primarily justified to meet larger unit demand, provides a range of unit sizes to meet local demand. Most obviously on parts of any allocation which by the required site layout is less suitable for large floorplates.

7.46 Although justified by the HENDA's approach to identifying the need for strategic warehousing units, it is very unlikely that the Council could, or even should, restrict the use of any unit to the B8 use classes. Should large B2 demand emerge there is no planning rationale not to facilitate this demand on the same site. With this in mind we refer to this land simply as land to meet 'large unit demand'.

Large Unit Demand

Consideration could be given to allocating further land to meet the needs of larger occupiers, who are not provided with space within the HEDNA estimate of industrial land need.

Around 10ha in a single allocation would appear reasonable to meet local needs. Any site would need excellent access to the strategic road network.

Although justified primarily for large unit demand it would be reasonable to also consider whether the allocation could provide an element of new, small, industrial units to meet a quantitative need in the local area.

From the sites submitted to the SHELAA we would suggest site PSE 24 (to the East of Shepshed) be considered further.

Controlling losses

7.47 Our assessment above has recommended slightly more land be provided than is needed to meet the HEDNA needs. But at the moment this land is not actually available to occupiers; i.e. undeveloped land is not substitutable for built floor space. Vacancy rates in the current stock are very low (industrial) and so land is not a good (short term) substitutive for the lack of built stock.

7.48 So in quantitative terms there is still a need for the Council to control the loss of the built stock. Also, given we expect losses of former industrial / manufacturing space to slow over the plan period (Chapter 3) strengthening development management polices to exert greater control over losses from the supply is justified.

7.49 To control losses most new plans, include some form of 'loss' policy which requires applicants to demonstrate that they have tried to market a site before concluding it should be lost. Such a criterion is in line with the NPPF 'reasonable prospects' test and some marketing evidence is proportionate. Marketing (evidence of failed) allows the decision maker to have greater confidence that the site has no reasonable prospect of being used in each sites unique circumstance and setting. Also reflecting market evidence and the balance of demand at that point in time.

7.50 A suggested policy approach is outlined below. The Council may consider some of the text more appropriate for supporting text as opposed to policy.

7.51 It should be noted that applicants should be able to demonstrate that their site should not be subject to marketing where the planning balance suggests an alternative use is preferable; especially where sites are 'bad neighbours' for example.

Loss of employment floorspace and land

The Borough's stock of employment sites are generally well occupied and in market demand.

The Council will seek to retain sites within the B use classes and associated Sui Generis uses (employment use).

The Council will also keep undeveloped, allocated land, for future employment use.

Where a change is proposed, which involves the release of employment floorspace or land then the Council will expect supporting evidence to demonstrate that the site (or floorspace) has no reasonable prospect of being taken up.

This includes demonstrating that there is no reasonable prospect that the floorspace can be re-occupied and, where appropriate, the land redeveloped for a new employment use.

To support the proposed loss of space the Council expects applicants to provide robust marketing information demonstrating that sites cannot remain in an employment generating use.

Marketing evidence should demonstrate that:

- that both the land and the premises have been widely advertised and marketed for a wide range of economic uses for at least one continuous year immediately prior to submission of a relevant planning application.
- This should include offering the site for both freehold and leasehold interest at values reflective of the current market. Information should be provided to demonstrate that the values sought were reflective of the market; including benchmarking with similar properties (or land) in the market area.
- Information should be provided detailing any interest received from potential buyers or tenants since the marketing commence. Where interest has been received and that interest has not been pursued, this must be explained.
- Where sites are undeveloped, or property needs to be redeveloped, then viability testing of indicative schemes may be appropriate given the lack of property on site to offer to perspective tenants.

When assessing marking evidence, the Council will want to consider whether the space has been offered at a quality and value (price), that is attractive the Borough's small firms while also being viable to maintain. This reflects the fact that much of the local market demand comes from those occupiers who can afford to pay for secondary stock, but not new.

For allocated sites, which are not yet developed, we would expect a much longer period of marketing to be undertaken. This reflects the fact that our allocated sites, made in this plan, are not expected to be developed for a number of years. These development sites are our medium and long-term reservoir of sites intended to allow the economy to respond flexibly across the economic cycle.

Potential applicants are encouraged to seek the advice of the Council prior to seeking planning permission as regards their proposed marketing strategy. There may be cases where, on balance, a new employment use would not be supported by nature of the sites location or characteristics. Where applicants can clearly demonstrate that the site is not appropriate for ongoing employment use, by nature of its access or other limiting features, then marketing evidence will not be necessary. In preference, this should be agreed before the application being made.

Mixed-use redevelopment and renewal

Where an employment site cannot remain in employment use applicants should first consider whether a mixed-use approach could offset part of the loss of employment generating space. That is before considering total loss.

In considering this approach applicant should aim to replace a quantum and quality of space which is in demand. In parts of the Borough this may be to meet the demand for small unit industrial or workshop space regardless of the fact that other uses (for example offices) could deliver more jobs as part of any mixed-use redevelopment. In general office based employment should not be used to offset the loss of industrial land or floorspace.

7.52 Viability assessments; to demonstrate a lack of viable demand for a range of policy compliant employment uses should be encouraged. This is because they help the consideration of an applicant's case. They are particularly useful for undeveloped land, including the sites allocated in the plan. because the applicant cannot provide evidence relating to built units. However, this level of detail is disproportionate for smaller sites.

7.53 Because rents / values change rapidly applicants should be encouraged to engage with the Council at the pre-application stage to agree the extent of supporting evidence required, including values and reasonable rents.

Article 4 Directions

7.54 The Borough does not currently control losses of B1(a) space to residential via Article 4 Directions. There is no pressing need to do so at the moment and normal planning controls should suffice. But this needs to be kept under review.

7.55 Given the scope for stock to be lost outside the planning process we would suggest this means that the Council ought to consider pro-actively monitoring vacancy and key market indicators (including rents).

7.56 Should vacancy rates fall below 7.5% (which we generally consider to be a 'healthy' rate) then this may signal a need to more proactively protect the stock.

APPENDIX A ASSESSMENT OF EMPLOYMENT SITES

A.1 Sites' assessment – criteria and scoring

A.2 Sites' assessment sheets

A1 Sites' Assessment – criteria and scoring

1.1 The sites' assessment gathers data on a number of criteria that are grouped as follows:

- Basic information
- Constraints
- Attractiveness to occupiers
- Overall review / recommendation.

1.2 The assessment considers the Borough's existing employment sites, and also the existing site allocations and proposal sites that are assessed in a broadly similar way, with one or two additional fields added such as identifying whether the site is previously developed land.

Basic information fields

1.3 The following information is provided:

- Identification number, name, location map, address, description of the site, site area, the primary type of employment (the main use class or alternatively mixed B) and the sites sequential location (within a town or district centre, within 400m of a centre, within the built-up area, adjacent to it or beyond).
- For the existing allocations and possible future sites the basic information also includes current use, whether the site is previously developed land, the principle use proposed and information on planning. The planning information identifies designations, planning history and whether the site plays a role in the delivery of other Council policies.

Constraints

1.4 For the existing employment sites constraints are restricted to any bad neighbour impact, which considers the potential impact of particular employment uses on neighbouring uses and vice versa. Some employment uses are noisy and/or dirty and would not be suitable next to uses such as residential, school or office. The impact is scored as per the explanation in the criteria scoring sheet.

1.5 For the allocations and possible sites this is widened to any physical or policy constraint that may affect availability (which could be immediately, within the plan period or not in the plan period depending on the nature of the constraint (none, minor or major). Physical constraints could include ground conditions, contaminated land/historic landfill site or overhead line buffer. These potential constraints are assessed using the 'none/ minor/ major' scoring format.

Attractiveness to occupiers

1.6 The assessments address the external environment, the internal environment, accessibility to the strategic road network, local access by road, access to public transport access and market signals.

1.7 The assessment scoring range for the first four criteria is – good – reasonable – poor. Relative to each criterion a site that is judged to be very attractive is identified as good, sites of moderate attractiveness are classed as reasonable, and sites we consider to be unattractive to occupiers are rated poor. The assessment of access to public transport is different and the assessment is 'yes' or 'no' relative to the criteria.

1.8 Market signals is considered in terms of vacancy for the existing designated sites using the good – reasonable – poor scoring, and information relating to known occupier/developer interest for the site allocations/possible sites.

Review / Recommendation

1.9 A review, based on the information as to whether existing employment sites will continue to be occupied (yes, no or maybe where there is some doubt), whether there are opportunities for (re)development and what constraints this may entail and then an overall recommendation – to retain or release.

1.10 For the site allocations and possible sites, the review considers whether the sites are attractive to potential future occupiers and whether the site is suitable for the identified employment use. The prospects of the site being occupied are summarised and on the basis of the assessment a recommendation is drawn. Allocated sites should either be retailed or deallocated, and possible sites either allocated or not allocated.

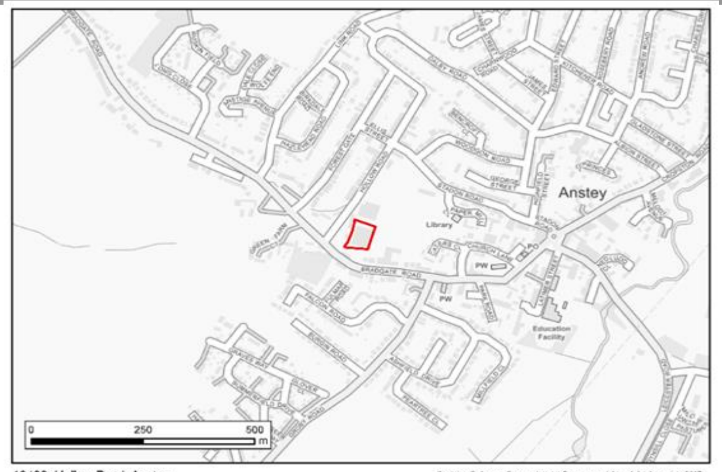
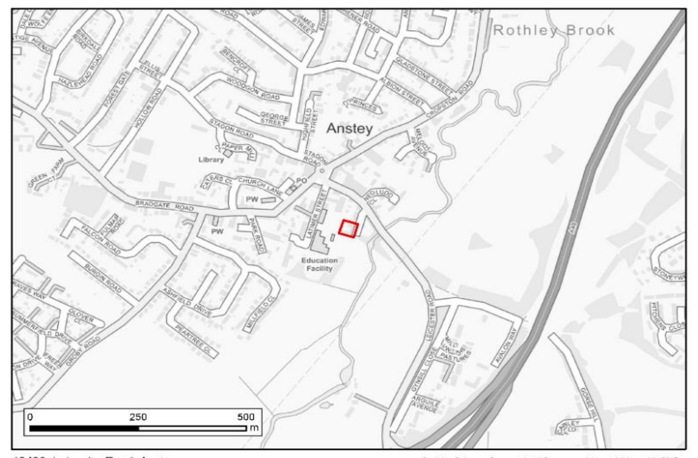
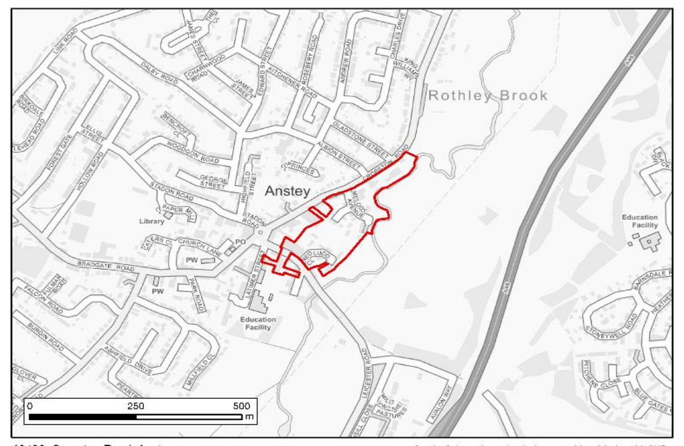
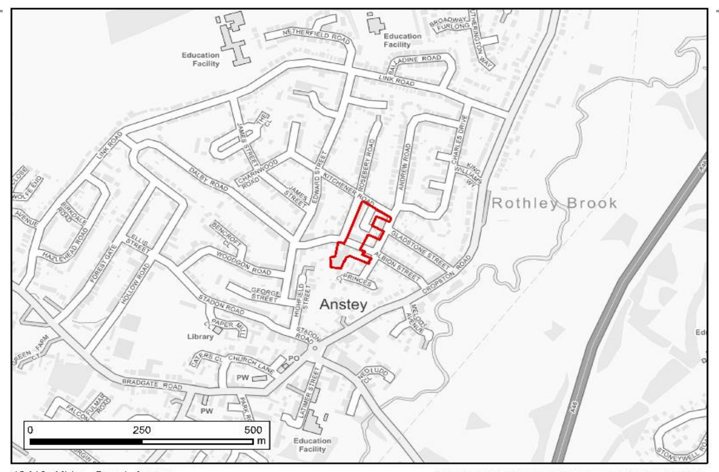
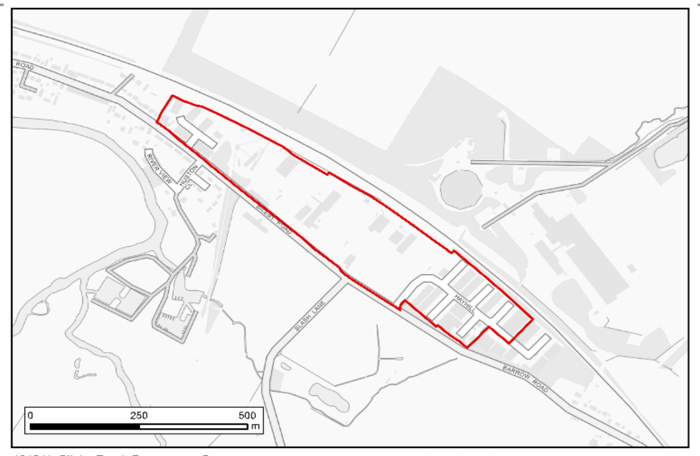
1.11 The table below sets out more detailed explanation of the scoring scales for the criteria where scales are applied.

Scoring scales explanation

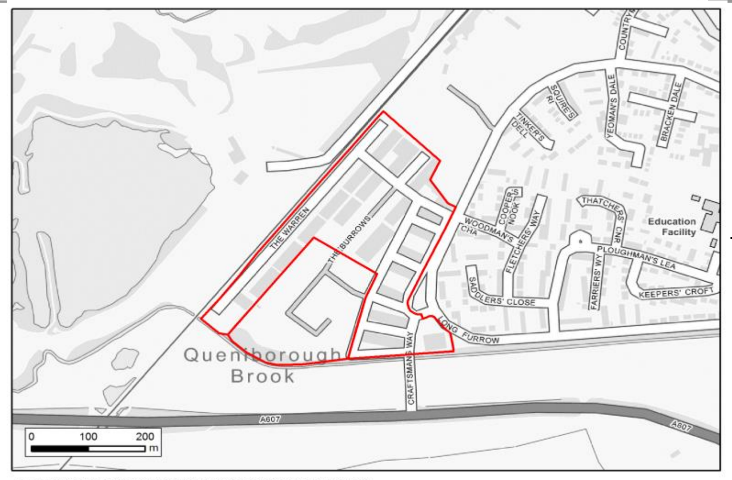
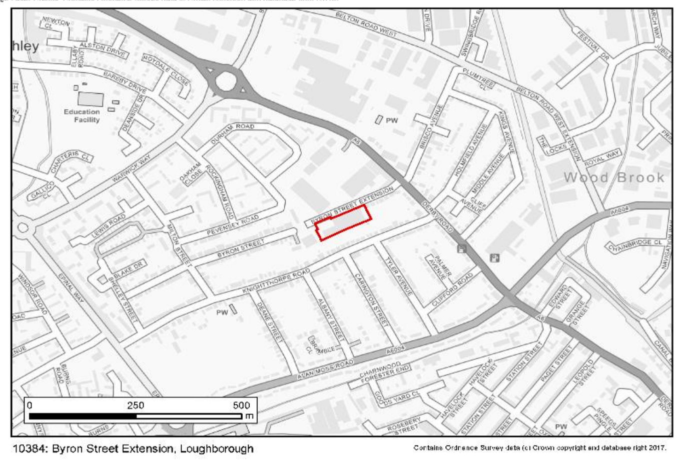
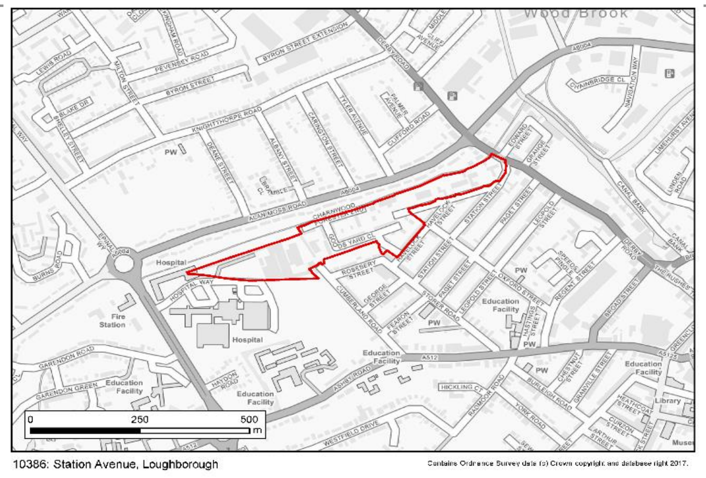
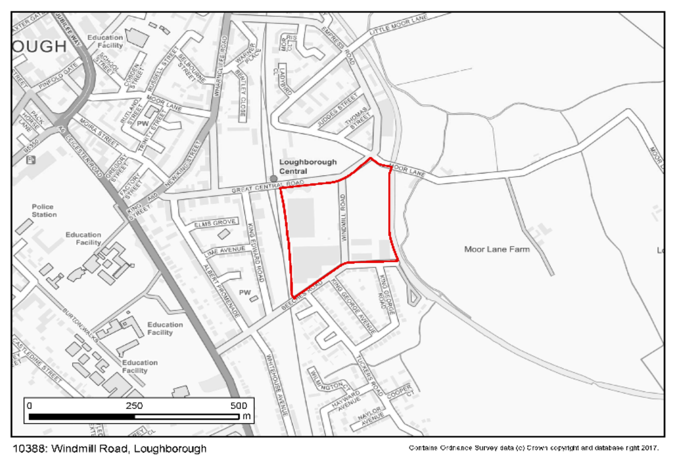
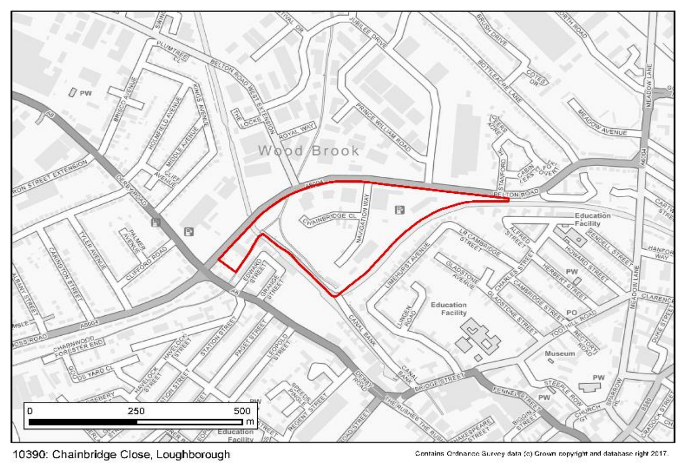
Criterion	Scoring scale	Explanation
Bad neighbour impact	Major, minor none	Major: residential units/school/hospital immediately adjacent and where mitigation would be difficult/very costly. Minor: residential/school/hospital close by, but not immediate, and where any issues are likely to managed through mitigation. None: no sensitive receptors near the site.
Prominence / compatibility of surrounding uses / amenities	Good, reasonable or poor	Good: well located for local amenities (in/edge of town location, <0.5kms), good visibility for business occupiers, similar uses nearby or location large enough to have critical mass to standalone Reasonable: local amenities either nearby but relatively limited or further away (between 0.5-1.5kms); other similar uses nearby, but area more mixed. Visible from road network. Poor: limited visibility in commercial terms; few similar businesses in surrounding area and/or sensitive neighbours nearby. Amenities more than 1.5kms.
Layout, parking, servicing & landscaping	Good, reasonable or poor	Good: well-maintained and laid out. Sufficient parking. Evidence of active management.

Criterion	Scoring scale	Explanation
		Reasonable: Parking in high demand and can result in some on kerb parking at busy times. Tidy site but would benefit from improvement to landscaping, surfacing etc. Poor: Insufficient parking or not sufficient controls on parking results in parking on streets and kerbs. Limited landscaping and poorly laid out.
Proximity to motorway / principal A roads	Good, reasonable or poor	Good: direct access onto strategic road network or less than 1 km from motorway junction Reasonable: longer distance, but <3km on high quality local road to connect with strategic road network Poor: access to strategic road network via a number of different local roads and or >3kms.
Suitability of local access	Good, reasonable or poor	Good: junction onto road network suitable for type of employment use on site. Local roads suitable to take the type of vehicles used/envisaged. Potential to accommodate additional traffic if site successful/expanded. Reasonable: junction onto road network suitable for current use, but may require upgrade, particularly if intensity of use increased. Poor: site access and local roads not sufficient to accommodate volume and type of traffic using the site – could result in congestion in or off site through queuing at busy times.
Public transport accessibility	Good, reasonable or poor	Good: where there are >15 bus stops within a 400 metre radius. Reasonable: where there are between 6-15 bus stops within a 400 metre radius. Poor: where there are <5 bus stops within a 400 metre radius.
Vacancy	Good, reasonable or poor	Good: no or very little vacancy Reasonable: a number of vacant units. Poor: the majority of units / floorspace are vacant.
If the site retains its current use, will it be occupied?	Yes, maybe or no	Yes: well occupied and/or market signals indicate it will be in the future. Maybe: a number of vacant units and/or market signals neutral. A number of units available in the local area. No: high vacancy and/or negative market signals. Lots of stock availability in the local area. And/or developer interest as evidenced by extant permission or live application for another use.

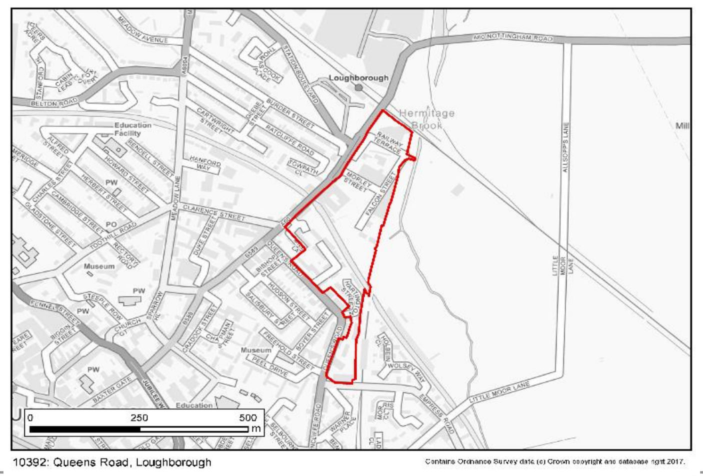
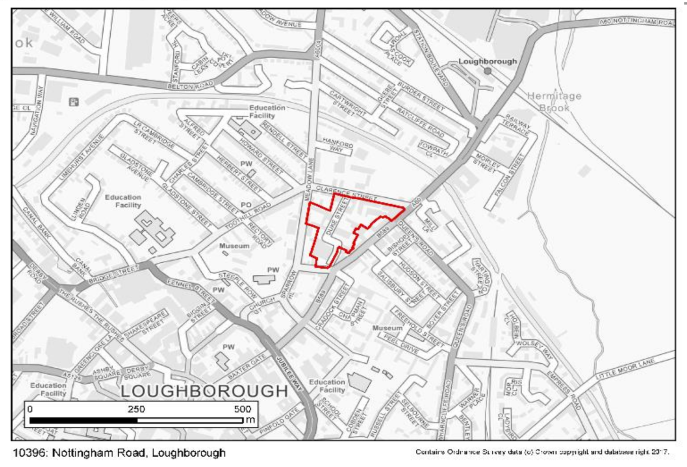
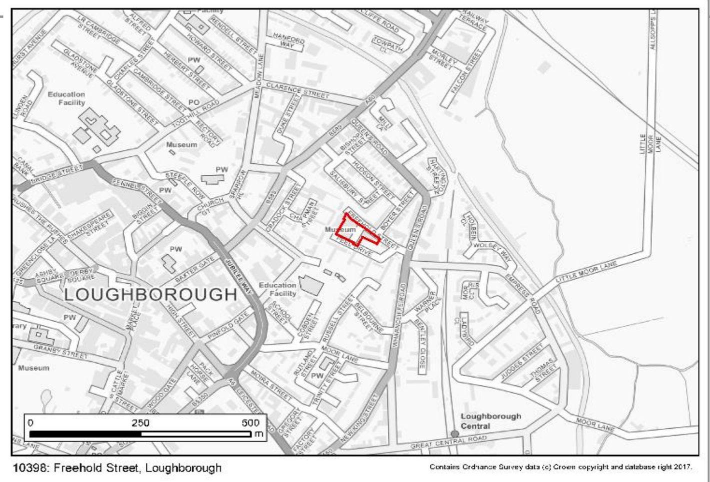
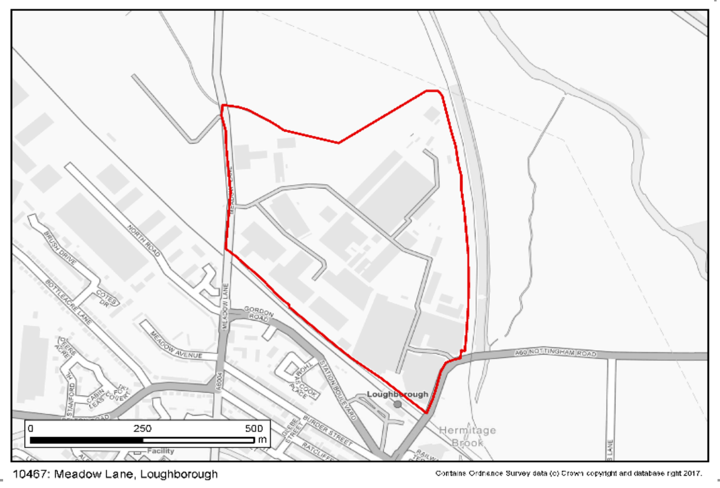
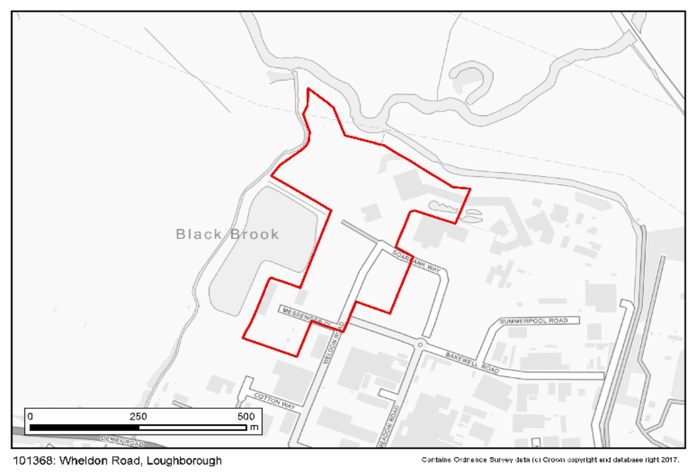
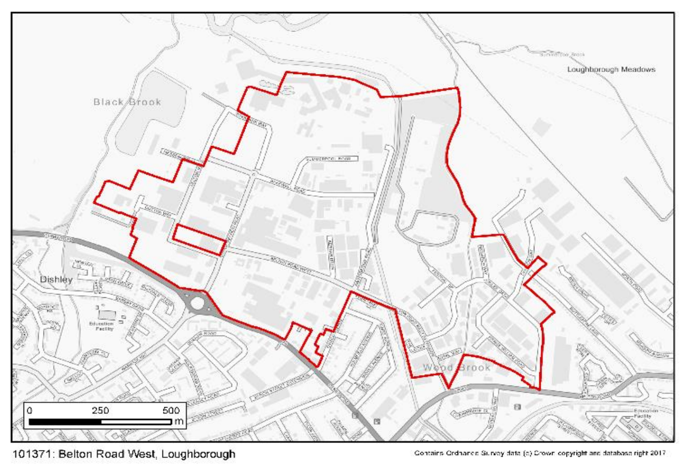
Existing designated emplt sites

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION										**CONSTRAINTS**		**ATTRACTIVENESS TO OCCUPIERS** *External environment*					
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
10403	Hollow Road, Anstey	 10403: Hollow Road, Anstey	Hollow Rd	Anstey	South of the Borough	Industrial building in largely residential area. A second industrial building, outside the designated lies immediately to the north.	0.3	General Industrial (B2)	Within the built up area	Neighbouring residential	2. Minor	To the rear of Bradgate / Hollow Rds. Low prominence.	1. Poor	Low rise buildings, set back from access road. Comparable with surroundings.	3. Good	0.5	3. Good
10408	Leicester Road, Anstey	 10408: Leicester Road, Anstey	Leicester Rd	Anstey	South of the Borough	Industrial sheds backing on to primary school, facing park.	0.1	General Industrial (B2)	Within the built up area	School to the rear, residential adjacent.	2. Minor	Cul-de-sac location	1. Poor	Low density, so compatible with neighbouring uses.	3. Good	0.3	3. Good
10409	Cropston Road, Anstey	 10409: Cropston Road, Anstey	Cropston Road	Anstey	South of the Borough	The main part of the site, north of Leicester Rd has been redeveloped for non-employment uses (retail and residential. A small area of local service employment has been retained on Ned Ludd Close, covering 0.1ha, of what was a 3.6ha site. 90% of the site has been redeveloped for non-employment uses. The area south of Leicester Rd has not been redeveloped, but is not in B class employment use (main uses funeral directors and vet surgery).	0.1	General Industrial (B2)	Within the built up area	None. Town centre site.	3. None	Low	1. Poor	Low density units to rear of retail frontage.	3. Good	0.5	3. Good
10410	Albion Street, Anstey	 10410: Albion Street, Anstey	Albion Street	Anstey	South of the Borough	The block north of Albion St has been redeveloped for housing, leaving just the sheds south of Albion St in employment use.	0.8	General Industrial (B2)	Within the built up area	In a predominantly residential area.	2. Minor	In a residential area.	1. Poor	Low density, single storey, so not dominant.	2. Reasonable	0.6	2. Reasonable
101311	Sileby Road, Barrow upon Soar	 101311: Sileby Road, Barrow upon Soar	Sileby Rd	Barrow	Rural	Site comprises Sileby Rd IE, Tarmac & Brett general manufacturing and the Hayhill IE (including the developed E5a site). Immediately to the north, across the railway line is the British Gypsum site.	14.9	General Industrial (B2)	Adjacent to the built up area	Site is very largely separated from sensitive neighbours.	2. Minor	The site is fairly well screened from the adjacent road, which is important for the heavy industrial uses, but fails to give the Hayhill any presence.	1. Poor	The heavy industrial uses are buffered either end by the IEs which are closest to the nearest residential.	3. Good	1.9	1. Poor
10468	Charnwood Edge BP, Cossington	 10468: Cossington	Cossington	Cossington	Rural	Modern BP in out of centre location on an island site at the junction of A46/A607 to the north of Syston.	5.3	Office (B1a)	Outside the built up area	None	3. None	Good visibility from the surrounding road network.	3. Good	No incompatible uses close by.	3. Good	2.6	1. Poor

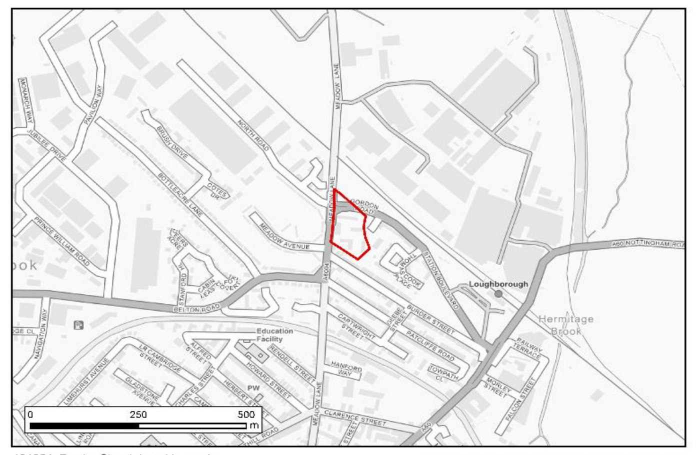
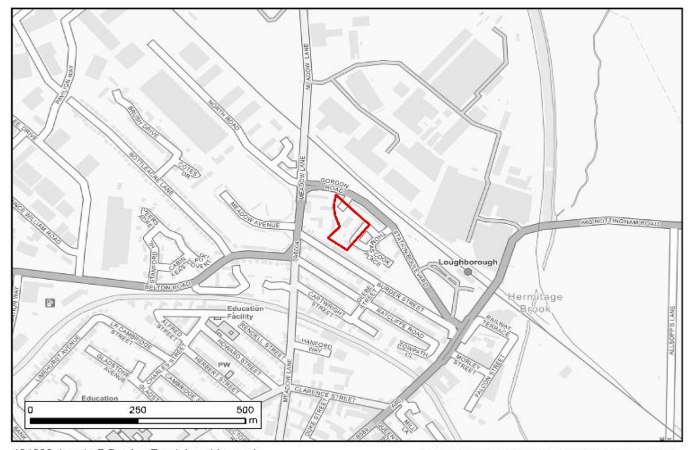
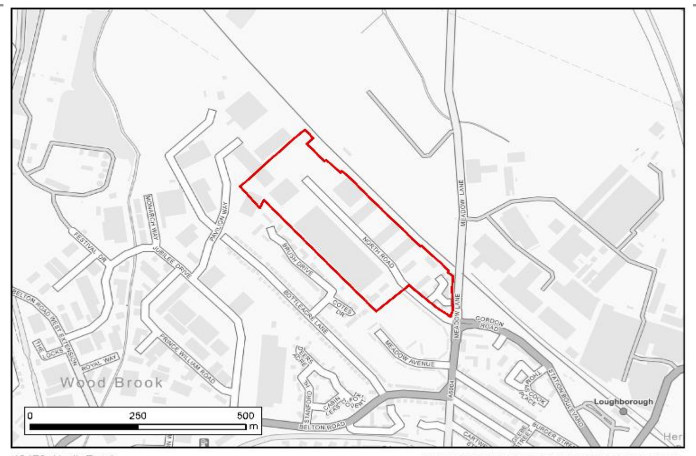
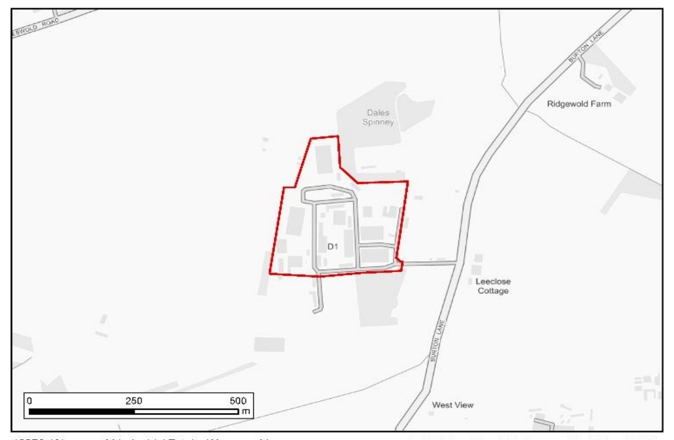
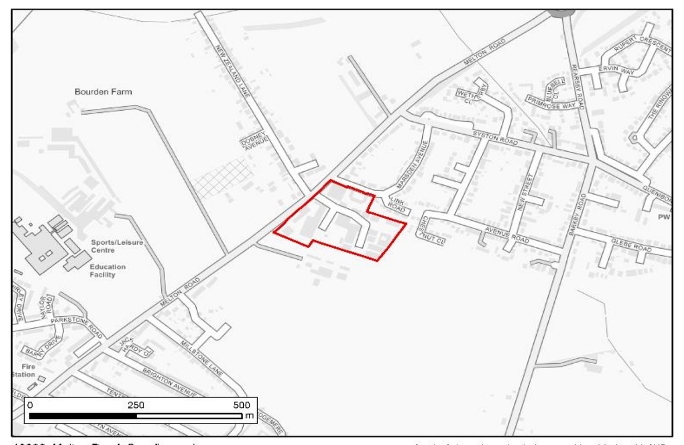
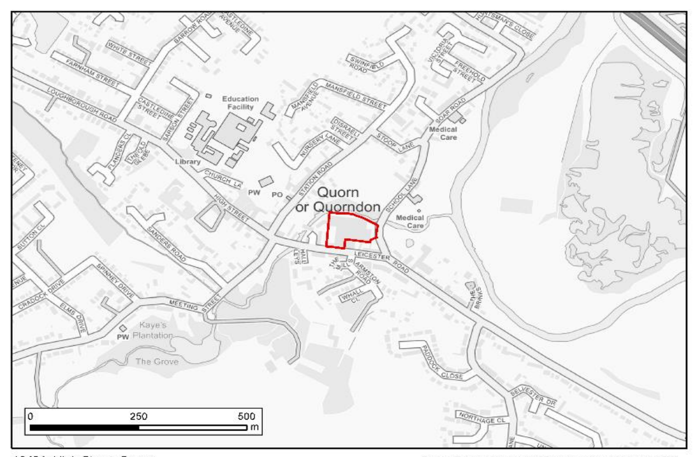
Existing designated emplt sites

1 BASIC INFORMATION Site ID.	2 Site name	3 Site location map	4 Site address	5 Centre	6 Market area	7 Site description	8 Site area (ha)	9 Primary type of employment	10 Site's sequential location	11 CONSTRAINTS Detail any constraint(s)	12 Bad neighbour impact	13 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	14 Score	15 Compatibility with surrounding uses	16 Score	17 Access to amenities (nearest centre km)	18 Score
108968	East Goscote IE		The Warren	East Goscote	South of the Borough	Purpose built IE off the A607 on the edge of East Goscote. Currently 6.8ha, but will increase to 10.75ha when the area at the core is developed.	6.8	General Industrial (B2)	Within the built up area	Residential to the east.	2. Minor	Low, on the edge of the village, not visible from the A607.	1. Poor	Railway to the west and arable on 2 sides, with just the residential to the east potentially sensitive.	2. Reasonable	1.1	2. Reasonable
10384	Byron Street Extension, Loughborough		Byron Street Extension	Loughborough	Loughborough	Site occupied by the Volvo truck and bus centre opposite a retail park.	0.5	Light Industrial (B1c)	Within the built up area	Neighbouring residential. Current use may generate noise and fumes.	2. Minor	Low prominence on a quiet cul-de-sac.	1. Poor	Compatible with the retail sheds, possible conflicts with the residential.	2. Reasonable	2.3	1. Poor
10386	Station Avenue, Loughborough		Station Avenue	Loughborough	Loughborough	This site has been largely redeveloped for non-employment uses - residential on the western side (Goods Yard Close)and the recent granting of planning permission for a Lidl store on the eastern (Station Approach) side. In the middle is the Travis Perkins building materials unit in the middle providing 0.1 ha in employment use.	0.1	Other	Within 400m of a town centre	Existing use is office hours and compatible with residential.	3. None	Low	1. Poor	Existing use is compatible with residential and planned new foodstore.	3. Good	2.0	1. Poor
10388	Windmill Road, Loughborough		Windmill Road	Loughborough	Loughborough	The north east quadrant of this site has been released for residential (equating to circa 40% of the overall site). In the south east quadrant are smaller workshop units in the St Modwen centre. The southwest quadrant are large industrial units with parking area stretching north, and the north west quadrant is home to a large former industrial building now used for leisure pursuits.	6.2	General Industrial (B2)	Within the built up area	The new residential will now become a constraint on the manufacturing facilities.	2. Minor	Not on a major route, so low prominence.	1. Poor	The industrial and leisure are compatible, but the residential less so.	2. Reasonable	1.1	2. Reasonable
10390	Chainbridge Close, Loughborough		Chainbridge Close	Loughborough	Loughborough	The Belton Rd frontage has been released for car showrooms, but the central area that is used for open storage of building materials and car sales at the very south, the industrial units at the southern end of the site remain in employment use.	8.2	Storage and Distribution (B8)	Within 400m of a town centre	No residential nearby.	3. None	Low, no main road frontage.	1. Poor	Compatible with commercial activities.	3. Good	2.3	1. Poor
10391	Hanford Way, Loughborough		Clarence Street	Loughborough	Loughborough	The middle of the site remains in employment use - mostly local services industry and car repairs and showrooms. The vacant land to the east had permission for residential but the time lapsed. Planning application submitted for builders merchants and B8 use. The north west corner has been redeveloped for residential.	3.3	Light Industrial (B1c)	Within 400m of a town centre	New residential to the south, and access to the strategic road network is difficult because if its central location.	2. Minor	Low, tucked behind the street frontages.	1. Poor	Light servicing industrial and car repair are not incompatible with residential.	2. Reasonable	1.3	2. Reasonable

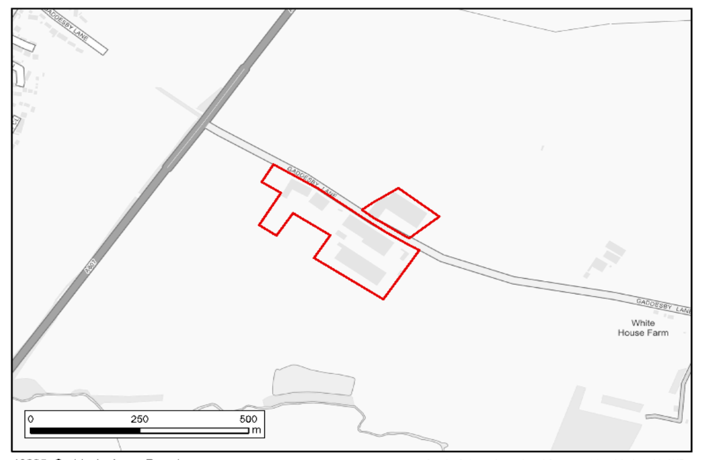
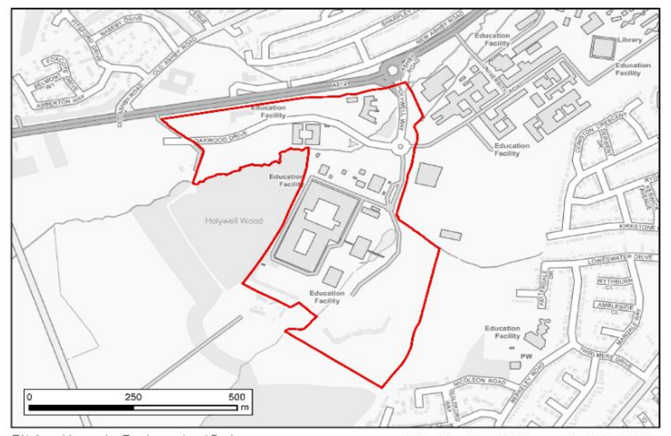
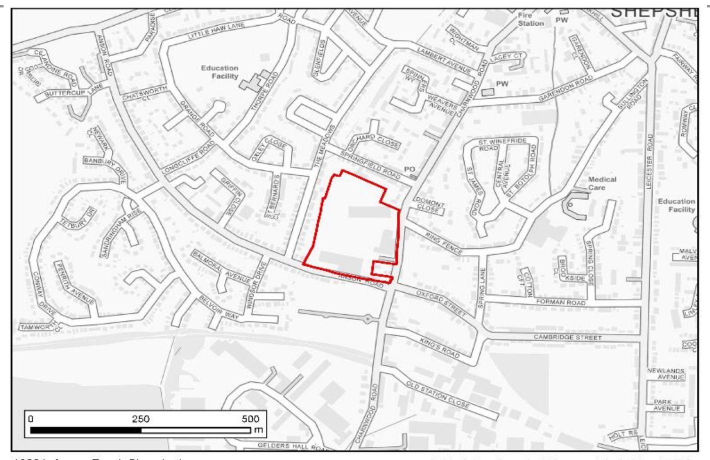
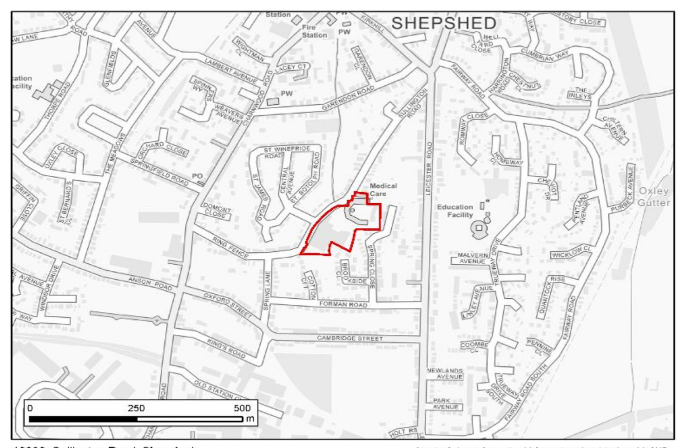
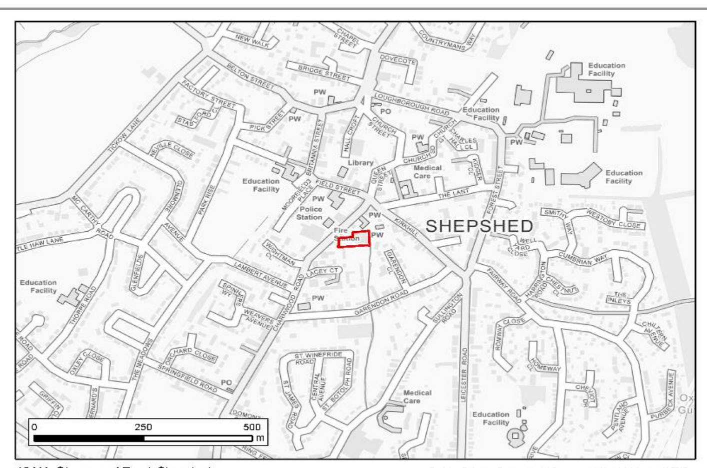
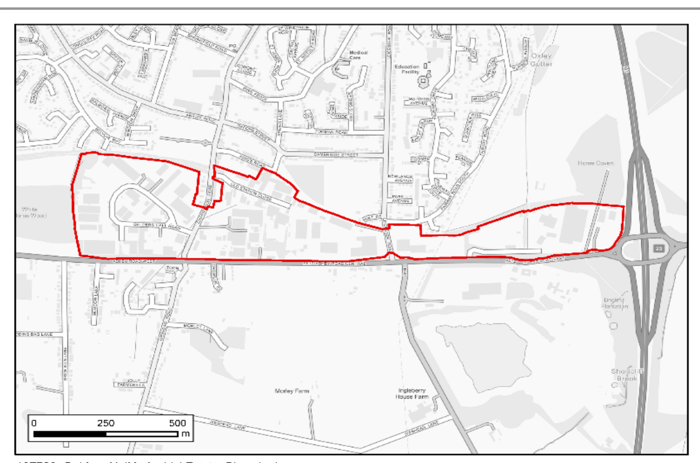
Existing designated emplt sites

1 BASIC INFORMATION Site ID.	2 Site name	3 Site location map	4 Site address	5 Centre	6 Market area	7 Site description	8 Site area (ha)	9 Primary type of employment	10 Site's sequential location	11 CONSTRAINTS Detail any constraint(s)	12 Bad neighbour impact	13 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	14 Score	15 Compatibility with surrounding uses	16 Score	17 Access to amenities (nearest centre km)	18 Score
10392	Queens Road, Loughborough		Queens Road	Loughborough	Loughborough	South of the canal the coachworks (Jacksons) remains, but otherwise the site has been released for residential. North of the canal there are some large industrial units - the historic mill home to 3M (who are relocating to Charnwood Campus very soon) and Preci Spark in a much more recent building. To the east is an open common.	7.6	Light Industrial (B1c)	Within 400m of a town centre	Neither the southern coachworks end and the area north of the canal are constrained by residential.	3. None	Low, as comparatively little fronts Nottingham Rd.	1. Poor	No residential to disturb.	3. Good	1.5	2. Reasonable
10396	Duke Street, Loughborough		Nottingham Road	Loughborough	Loughborough	Employment activity is not the dominant activity in this area now, retail, auto repair plus the PO sorting office. The area has lost its critical mass of industrial activity.	1.9	Other	Within 400m of a town centre	Existing stock is less suitable for industrial use, lacking high eves, delivery bay roller doors and yardage. Little residential in the locality.	3. None	Low, as does not front onto Nottingham Rd.	1. Poor	A broad mix, with comparatively little residential.	3. Good	1.0	2. Reasonable
10398	Taylors Foundry, Loughborough		Freehold Street	Loughborough	Loughborough	Foundry (and museum) in listed buildings surrounded by terraced residential.	0.3	General Industrial (B2)	Within 400m of a town centre	LB status and surrounding residential.	2. Minor	Low, tucked in the back streets.		Low	1. Poor	1.1	2. Reasonable
10467	Falcon IE, Loughborough		Meadow Lane	Loughborough	Loughborough	A mix of industrial, warehousing and office space of differing generations, wedged between two railway lines north of Loughborough station and town centre. This general industrial estate has an excellent location, remote from any sensitive receptors which is important given the heavy industrial nature of the activity.	28.7	General Industrial (B2)	Within the built up area	None	3. None	High, highly visible from the railway and the northern part of the town centre.	3. Good	Railway and open country, no incompatibility issues.	3. Good	1.7	1. Poor
101368	Charnwood Campus, Loughborough		Bakewell Road	Loughborough	(Loughborough)	Former Astra Zenica site	14.0	Research and Development (B1b)	Within the built up area	None	3. None	Prominent from Bakewell Rd, but the site is at the back of the IE.	2. Reasonable	Fully compatible with the surrounding mostly industrial uses.	3. Good	3.6	1. Poor
101371	Belton Road West, Loughborough		Belton Road West	Loughborough	Loughborough	Extensive industrial area comprising a number of separate but interrelated trading estates, with a wide range of activity including sewage works and cement batching to scientific lab equipment and healthcare products and trade counters.	106.4	General Industrial (B2)	Within 400m of a town centre	None	3. None	Highly prominent from Derby Rd	3. Good	Fully compatible with the neighbouring science park and the retail uses on the Derby Rd frontage.	3. Good	2.8	1. Poor

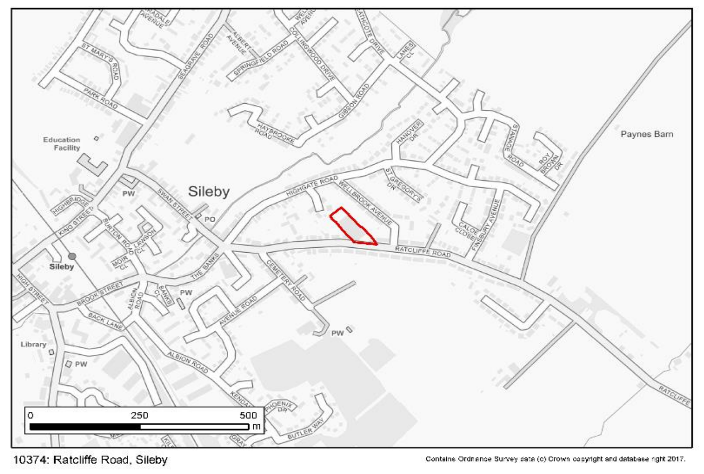
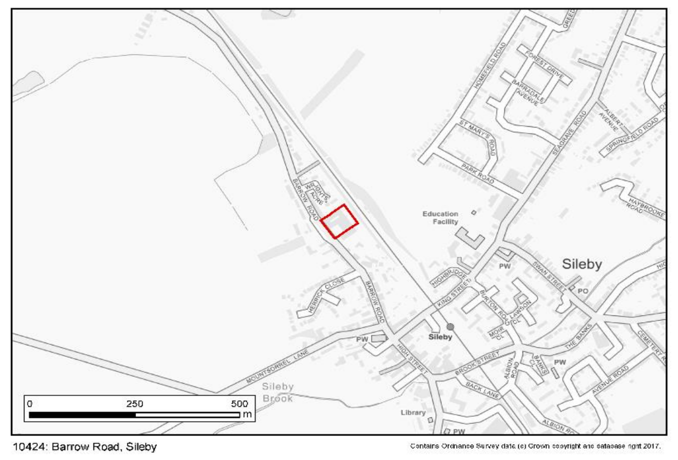
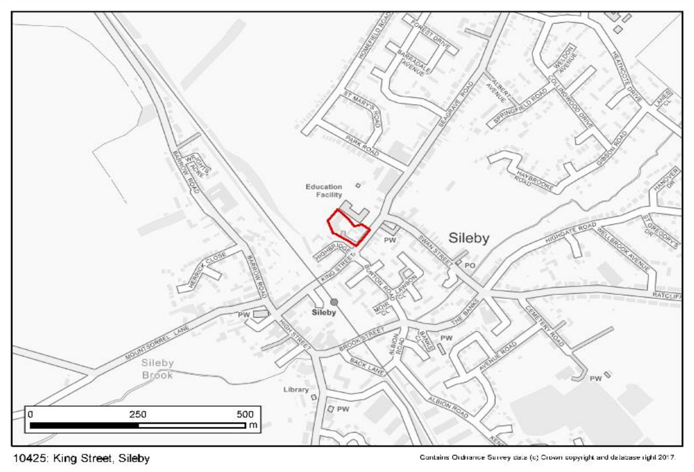
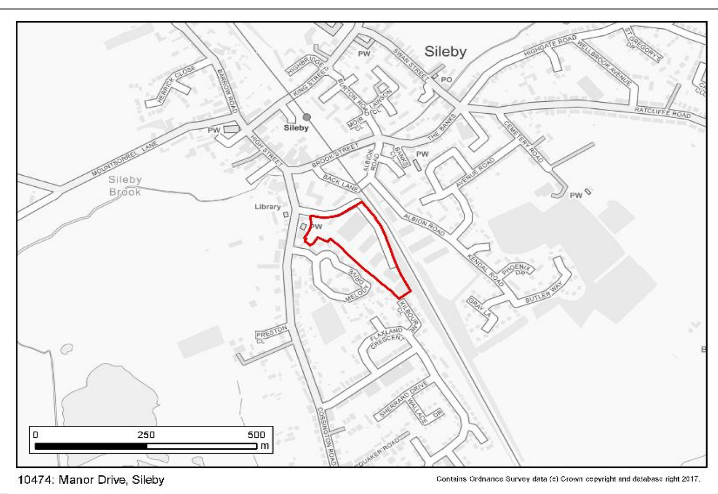
Existing designated emplt sites

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 ATTRACTIVENESS TO OCCUPIERS *External environment*	14	15	16	17	18
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
101394	Meadow Lane IE, Loughborough	 101394: Burder Street, Loughborough	Burder Street	Loughborough	Loughborough	Collection of workshop units and the Ark Business Centre	0.9	Light Industrial (B1c)	Within 400m of a town centre	None. The site is bounded by two main roads, more industrial units to the east and there is a strong landscape buffer to the south with residential beyond.	3. None	The Ark has high prominence at the junction of two main roads.	3. Good	Fully compatible	3. Good	1.9	1. Poor
101398	Land off Gordon Road, Loughborough	 101398: Land off Gordon Road, Loughborough	Land off Gordon Road	Loughborough	Loughborough	Two modern small industrial units	0.6	Light Industrial (B1c)	Within 400m of a town centre	Residential to the rear	2. Minor	Sited behind other development.	1. Poor	Residential to the rear.	2. Reasonable	1.8	1. Poor
10470	Charnwood Business Park	 10470: North Road	North Road	Loughborough	Loughborough	A modern estate of large sheds backing onto the railway line.	9.1	Light Industrial (B1c)	Within 400m of a town centre	Access issues passing through a residential area at the southern end of North Rd.	2. Minor	Low, because shielded by residential on the southern end of North Rd.	1. Poor	Mostly compatible with neighbouring industrial units to the north and the railway line. Only issue with the residential at the southern end of North Rd.	2. Reasonable	2.0	1. Poor
10378	Wymeswold Industrial Estate, Wymeswold	 10378: Wymeswold Industrial Estate, Wymeswold	Burton Lane	Wymeswold	Rural	Purpose built IE in a rural location south of Wymeswold village. To the rear is a racetrack, Mostly in general industrial, but also distribution use.	8.2	General Industrial (B2)	Outside the built up area	Access on the single carriageway Burton Lane is the key constraint.	3. None	Site has no visual prominence from Burton Lane.	1. Poor	No sensitive neighbours.	3. Good	6.0	1. Poor
10366	Queniborough IE	 10366: Melton Road, Queniborough	Melton Road	Queniborough	South of the Borough	The area immediately fronting Melton Rd is retail or SG uses. To the rear the IE comprises mostly small older units. The IE is poor quality in terms of building stock and environmental quality.	3.3	Light Industrial (B1c)	Within the built up area	Residential to the immediate north.	2. Minor	Low, no visual prominence to the rear of retail units.	1. Poor	Potential conflict with adjacent residential.	2. Reasonable	1.4	2. Reasonable
10401	Quorn Mills, Leicester Rd, Quorn	 10401: High Street, Quorn	High Street	Quorn	Rural	Manufacturing unit occupied by single user - M Wright. Older manufacturing shed with parkland to north and mixed uses to the south and west, accessed off School Lane.	0.7	Light Industrial (B1c)	Within the built up area	River/parkland to the north, and mix of uses including residential immediately to the south.	1. Major	Low, located to the rear of the main road.	1. Poor	Sensitive uses and environment.	1. Poor	0.3	3. Good

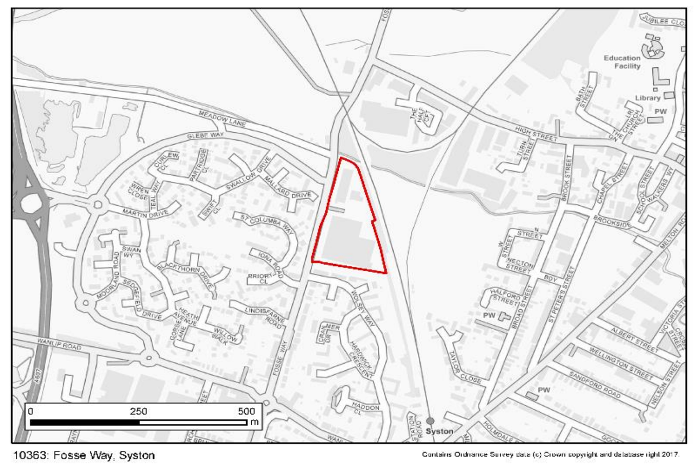
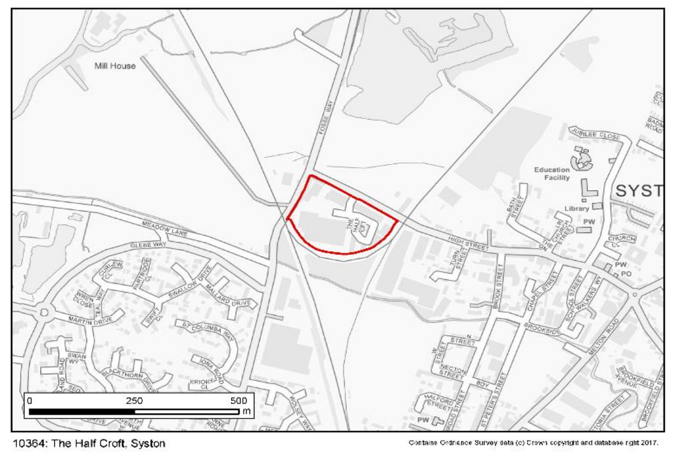
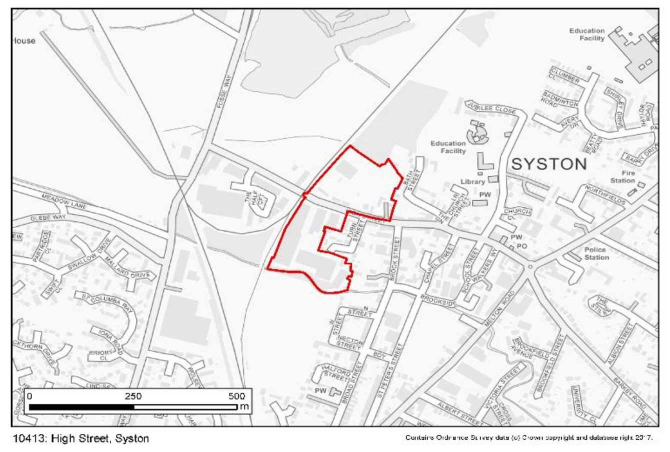
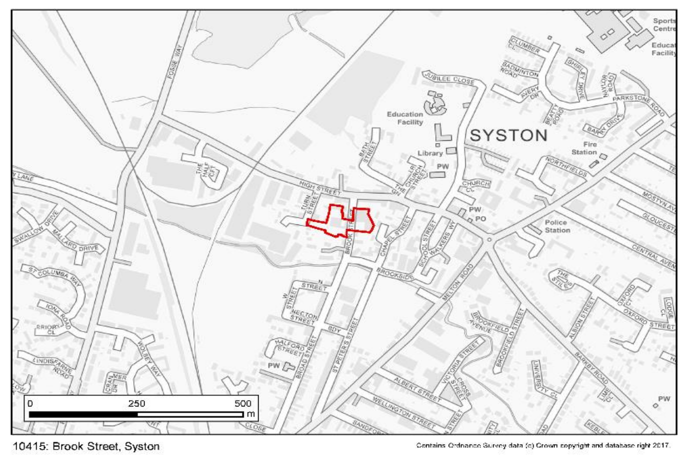
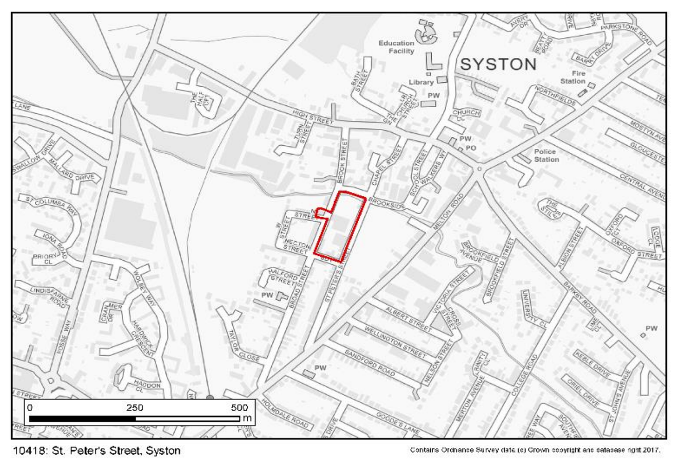
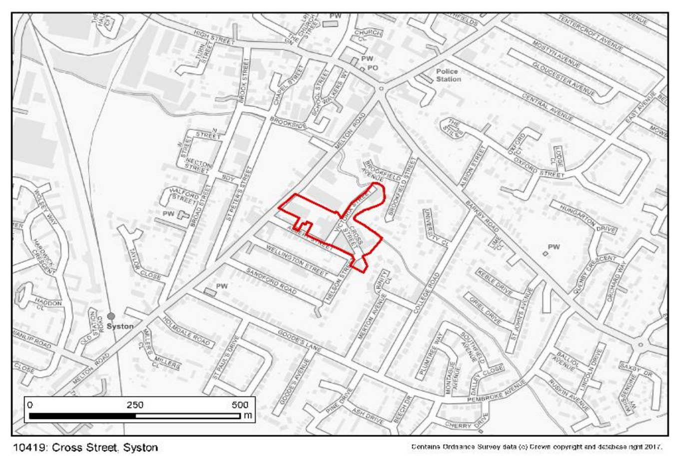
Existing designated emplt sites

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 ATTRACTIVENESS TO OCCUPIERS *External environment*	14	15	16	17	18
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
10365	Rearsby BP	 10365: Gaddesby Lane, Rearsby	Gaddesby Lane	Rearsby	Rural	Large industrial buildings occupied by a small number of mostly manufacturers in a rural location.	3.3	General Industrial (B2)	Outside the built up area	None, other than rural location.	3. None	Locally prominent, but not visible from A607J.	1. Poor	Prominent buildings in rural locality.	1. Poor	2.7	1. Poor
E/4	Loughborough Science & Enterprise Park	 E/4: Loughborough - Employment and Business	Oakwood Drive	Loughborough	(Loughborough)	High specification R&D and office space provided in a number of buildings in a campus setting. The Phase 1, Innovation Centre dates from 1992 and phase 2, sports advanced tech and park is all but complete.	26.4	Research and Development (B1b)	Adjacent to the built up area	None	3. None	High, entrance directly off A512.	3. Good	Good, no residential in close proximity.	3. Good	on site	3. Good
10381	Anson Road, Shepshed	 10381: Anson Road, Shepshed	Anson Road	Shepshed	Shepshed	Site used largely for car storage/auction and retail.	4.0	Other	Within the built up area	In a primarily residential area	2. Minor	Low, on a predominantly residential road.	1. Poor	Possible constrains with the residential.	2. Reasonable	0.4	3. Good
10383	Sullington Road, Shepshed	 10383: Sullington Road, Shepshed	Sullington Road	Shepshed	Shepshed	Site boundary needs revising to account for the northern parcel being redeveloped for residential. Employment site now restricted to single manufacturer, Urgo (medical supplies).	1.6	Light Industrial (B1c)	Within the built up area	Site surrounded by residential.	1. Major	Low, in a residential area.	1. Poor	Possible conflict with residential.	1. Poor	0.5	3. Good
10411	Charnwood Road, Shepshed	 10411: Charnwood Road, Shepshed	Charnwood Rd	Shepshed	Shepshed	Vacant site formerly occupied by factory/ warehouse.	0.2	Light Industrial (B1c)	Within 400m of a town centre	Low, some residential, but mostly town centre services and leisure uses.	2. Minor	Low, no road frontage	1. Poor	Mostly low risk of conflict.	2. Reasonable	0.5	3. Good
107798	Gelders Hall Industrial Estate, Shepshed	 107798: Gelders Hall Industrial Estate, Shepshed	Gelders Hall Industrial Estate	Shepshed	Shepshed	An extensive area of industrial uses along the A512 between M1 J23 and Ashby Rd West. Some parts are purpose built IE (west of Charnwood Rd), the older lower quality IE between Charnwood Rd and Leicester Rd, and east of Leicester Rd - where two large stand alone industrial units (BOAL and GLW) are located.	43.9	Light Industrial (B1c)	Within the built up area	Residential to the north.	2. Minor	Medium given visual presence on the A512.	2. Reasonable	Generally minimal concerns.	3. Good	0.8	2. Reasonable

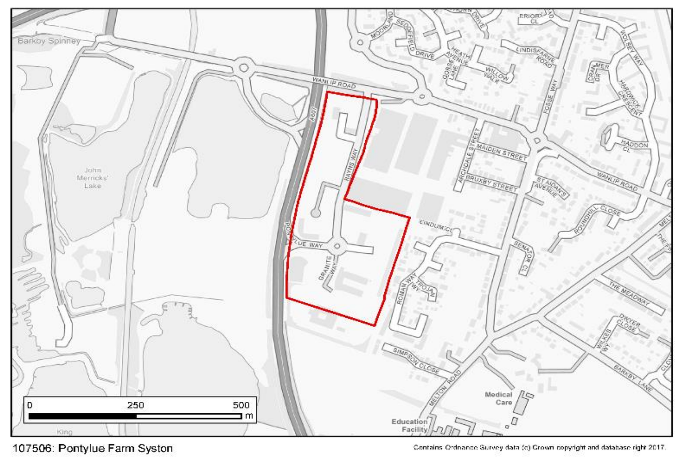
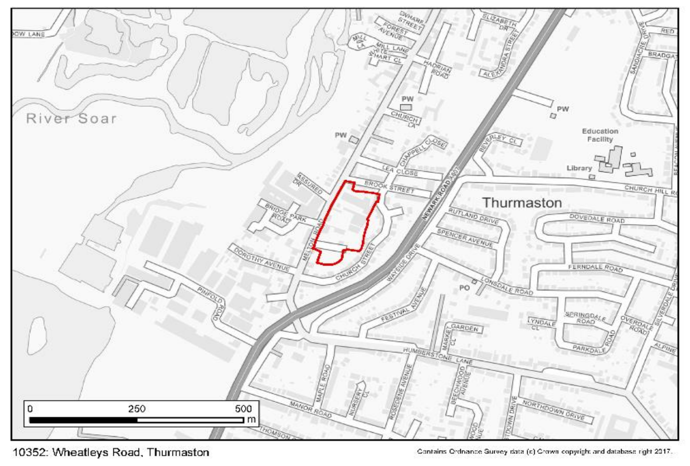
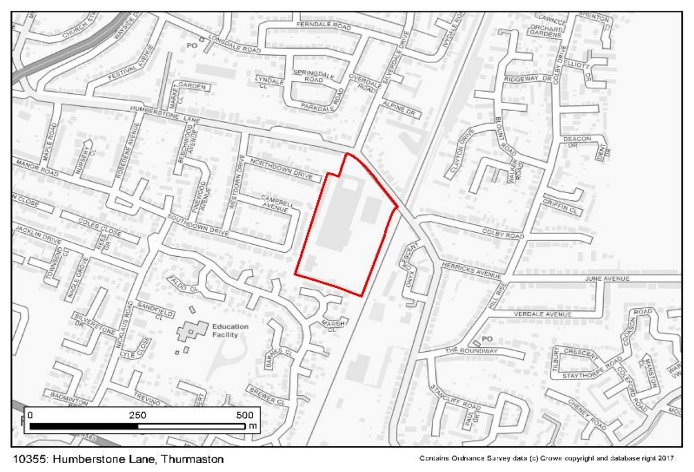
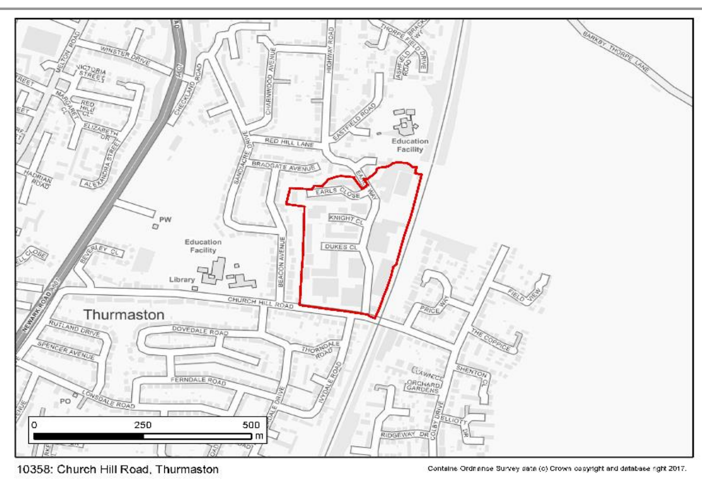
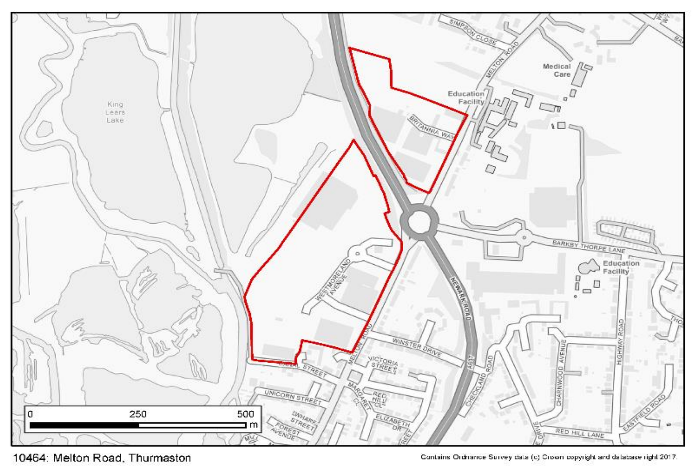
Existing designated emplt sites

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 ATTRACTIVENESS TO OCCUPIERS *External environment*	14	15	16	17	18
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
10370	Manor Drive, Sileby		Manor Drive	Sileby	Rural	Four industrial sheds adjacent to the railway line, but close to the village centre.	1.9	Light Industrial (B1c)	Within 400m of a town centre	Site is on a mild incline, but no obvious site constraints. Residential to the west is buffered by a dense area of mature planting.	2. Minor	Low, site is shielded from the village centre by other development.	1. Poor	No incompatible uses immediately adjacent.	3. Good	0.5	3. Good
10374	Oak Business Centre, Sileby		Ratcliffe Road	Sileby	Rural	Workshop and office accommodation for new and start-up businesses housed in an old brick industrial building.	0.4	Office (B1a)	Within the built up area	Surrounded by residential. But this is office/workshop type uses.	2. Minor	Low, it is on a predominantly residential street.	1. Poor	Low building height and brick construction bends with neighbouring residential.	3. Good	0.8	2. Reasonable
10424	Barrow Road, Sileby		Barrow Road	Sileby	Rural	Former factor buildings housing space for SME businesses, and a gym. Backing on to railway line.	0.4	Mixed B uses	Within 400m of a town centre	Residential to north and west. Uses are not general industrial.	2. Minor	Building prominent on the street, but largely residential street.	2. Reasonable	Use of similar materials and building height as adjacent residential.	3. Good	0.4	3. Good
10425	King Street, Sileby		King Street	Sileby	Rural	Vacant small engineering building.	0.4	General Industrial (B2)	Within 400m of a town centre	To the rear of a residential unit. Any intensification likely to cause conflict.	1. Major	Visible from main road through village.	2. Reasonable	Residential uses surrounding.	1. Poor	0.3	3. Good
10474	Albion Rd, Sileby		Albion Rd	Sileby	Rural	Four poor quality, dated ground-floor light industrial buildings all adjacent to the railway line, and facing a residential estate.	2.2	Light Industrial (B1c)	Within 400m of a town centre	Opposite residential. Units are currently in poor condition.	2. Minor	Very visible from the residential area opposite, but this is a residential area.	1. Poor	May be some conflict with residential.	2. Reasonable	0.4	3. Good
10360	Wanlip Road, Syston		Wanlip Road	Syston	South of the Borough	Large warehousing units off A46 J roundabout.	5.8	Storage and Distribution (B8)	Within the built up area	Some residential to the east, but buffered by landscaping.	3. None	Highly prominent site.	3. Good	Very few sensitive receptors nearby.	3. Good	1.7	1. Poor

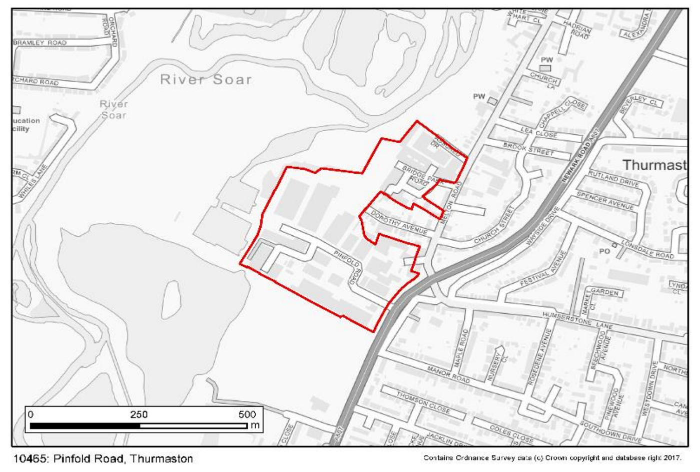
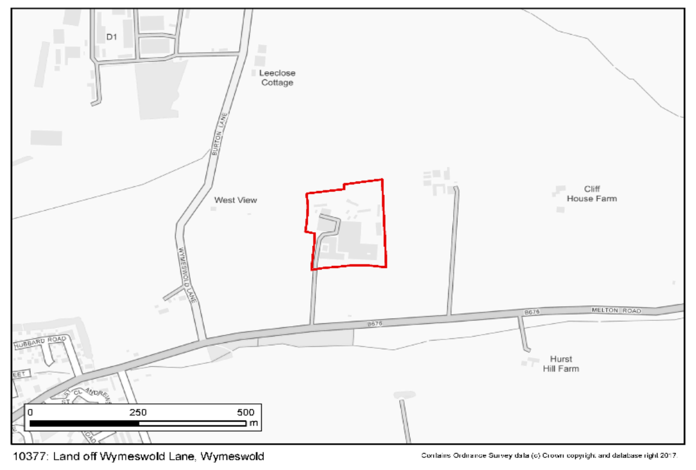
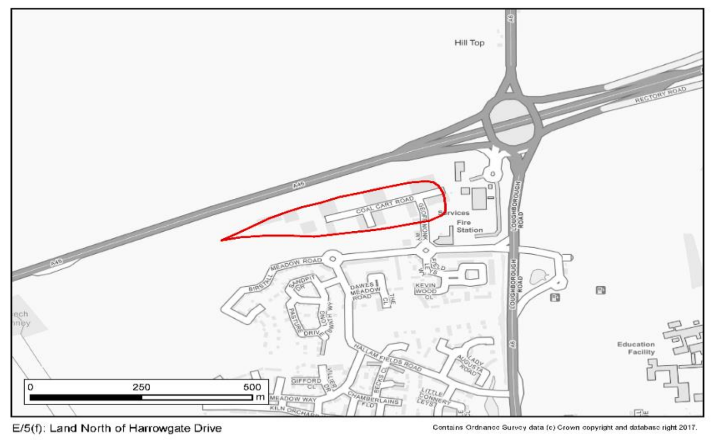
Existing designated emplt sites

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION										CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS					
												External environment					
Site ID.	Site name	Site location map	Site address	Centre	Market area	Site description	Site area (ha)	Primary type of employment	Site's sequential location	Detail any constraint(s)	Bad neighbour impact	Prominence of site	Score	Compatibility with surrounding uses	Score	Access to amenities (nearest centre km)	Score
10363	Fosse Way, Syston		Fosse Way	Syston	South of the Borough	Site occupied by two large engineering buildings. Wedged between the railway line and the Fosse Way.	2.9	General Industrial (B2)	Within the built up area	Residential on Wolsey Way to the south.	2. Minor	Entrance prominent on Fosse Way. Large buildings screened by dense landscaping.	2. Reasonable	Just a small number of residential units to the south.	3. Good	0.8	2. Reasonable
10364	The Half Croft, Syston		The Half Croft	Syston	South of the Borough	Manufacturing site for food manufacturer (Pukka Pies),who account for about one third of the area that is constrained by the railway, High St and Foss Way.	3.2	General Industrial (B2)	Adjacent to the built up area	Unconstrained by sensitive uses.	3. None	Low, site is well screened on all sides.	1. Poor	No issues.	3. Good	0.4	3. Good
10413	High Street, Syston		High Street	Syston	South of the Borough	The northern half of the site, north of the High Street is occupied by a building materials manufacturer (Interfuse). That area is mostly open storage of materials and product, with processing taking place in a relatively small building. South of High St are a number of older sheds of varying sizes that house building trades activity on the road frontage, and other more engineering or distribution activities to the rear. The whole site is constrained by road, railway and residential/recreation.	5.5	Mixed B uses	Within 400m of a town centre	Main constraint is residential in close proximity to the east.	2. Minor	Site is visible from the High St, which has encouraged trade activity on the road frontage.	2. Reasonable	Possible issues with residential	2. Reasonable	0.0	3. Good
10415	Brook Street, Syston		Brook Street	Syston	South of the Borough	Industrial buildings east of Brook St and truck breaker yard to the west.	0.7	General Industrial (B2)	Within 400m of a town centre	In a residential area. The truck breakers will generate noise and potentially bad neighbour issues.	1. Major	Low, due to being in a residential area.	1. Poor	The breakers is not compatible with residential.	1. Poor	0.2	3. Good
10418	St. Peter's Street, Syston		St. Peter's Street	Syston	South of the Borough	Half the site is no longer in employment use, but the southern parcel remains in warehousing use.	1.2	Storage and Distribution (B8)	Within 400m of a town centre	Neighbouring residential	2. Minor	Low, street frontage, but in a residential area.	2. Reasonable	Potential issues with neighbouring residential.	2. Reasonable	0.4	3. Good
10419	Cross Street, Syston		Cross Street	Syston	South of the Borough	About one third of this area has been redeveloped for retail uses. The remaining employment buildings are dated stock mostly in engineering or manufacturing use.	2.3	General Industrial (B2)	In a town centre	Neighbouring residential. But this is a long established employment area.	2. Minor	Low, this a 'back street' area accommodating uses that don't require street presence.	1. Poor	Retail to the north is a compatible use, residential to the west.	2. Reasonable	1.4	2. Reasonable

Existing designated emplt sites

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 ATTRACTIVENESS TO OCCUPIERS *External environment*	14	15	16	17	18
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
10420	Melton Road, Syston		Melton Road	Syston	South of the Borough	Site in occupied by an engineering company with residential on all sides. The site is a collection of separate buildings that interconnect.	0.2	Light Industrial (B1c)	Within 400m of a town centre	Located on a predominantly residential street with residential in close proximity.	2. Minor	Buildings have street frontage, but it is a residential road.	2. Reasonable	Possible minor incompatibility with residential.	2. Reasonable	1.0	2. Reasonable
107506	Watermead BP, Syston		Pontylue Farm Syston	Syston	South of the Borough	Newly developed BP, with pavilion HQ buildings in a parkland setting.	10.1	Office (B1a)	Within the built up area	Watermead Country Park to the west.	2. Minor	Highly prominent from the A607.	3. Good	Parkland setting needed to compliment the country park.	3. Good	2.1	1. Poor
10352	Wheatleys Road, Thurmaston		Wheatleys Road	Thurmaston	South of the Borough	A handful of industrial buildings backing on to residential.	1.8	Light Industrial (B1c)	Within the built up area	Residential to the rear, but with long gardens providing some separation.	2. Minor	Buildings fronting Melton Rd, which is reasonably busy.	2. Reasonable	This part of Melton Rd is commercial in nature, so engineering activity is compatible.	3. Good	2.3	1. Poor
10355	Humberstone Lane, Thurmaston		Humberstone Lane	Thurmaston	South of the Borough	Occupied by two large engineering companies, backing on to the railway line and otherwise surrounded by residential.	4.9	General Industrial (B2)	Within the built up area	Residential on 3 sides, but with dense landscape buffers.	2. Minor	Site has street frontage, but is only visible from the residential roads.	2. Reasonable	Could be some compatibility issues, but given uses are currently general industrial, any future use is likely to be more compatible.	2. Reasonable	2.8	1. Poor
10358	Earls Way IE, Thurmaston		Church Hill Road	Thurmaston	South of the Borough	An established IE in north Thurmaston with a broad range of quality, age and size of accommodation. Site borders the railway line to the east.	7.9	Light Industrial (B1c)	Within the built up area	Residential immediately to the north and west, but landscape buffering in place. Primary school a short distance to the west.	1. Major	Low profile IE	1. Poor	Residential may cause issues. Vehicles accessing the IE have to pass the school, on what is a single carriageway road.	1. Poor	3.5	1. Poor
10464	Melton Road, Thurmaston		Melton Road	Thurmaston	South of the Borough	Site split in two either side of the Thurmaston roundabout. The northern sector is a mix of medium sized warehousing and non-B uses, plus the very northern strip that is unused. South of the roundabout the site has recently been redeveloped with a small number of large industrial units, plus a large Costco store that takes up approx. one third of the site.	16.1	Mixed B uses	Within 400m of a town centre	A small number of residential to the south, otherwise unconstrained.	2. Minor	High, prominent on the A607 roundabout.	3. Good	No issues on all sides, other than potentially on southern residential side.	2. Reasonable	2.5	1. Poor

Existing designated emplt sites

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 ATTRACTIVENESS TO OCCUPIERS *External environment*	14	15	16	17	18
Site ID.	**Site name**	**Site location map**	**Site address**	**Centre**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employment**	**Site's sequential location**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Score**	**Compatibility with surrounding uses**	**Score**	**Access to amenities (nearest centre km)**	**Score**
10465	Pinfold Road, Thurmaston		Pinfold Road	Thurmaston	South of the Borough	Two areas - Bridge Road BP and the Pinfold Rd IE. The BP is a mix of office suits and industrial units and backs onto the Watermead Country Park. The IE is occupied by larger industrial units and backs onto the marina. Some of the stock is dated, but generally is of a reasonable quality.	13.0	Light Industrial (B1c)	Within the built up area	The marina and sensitive country park setting is a constraint n the current operation and future redevelopment potential of the IE and BP.	1. Major	Moderate prominence from Melton Rd, but highly prominent from the country park.	1. Poor	Incompatible with leisure and rural pursuits.	1. Poor	2.3	1. Poor
10377	Land off Wymeswold Lane, Wymeswold		Land off Wymeswold Lane	Wymeswold	Rural	Site is the manufacturing base for Eaton Bussmann - an electronics manufacturer. This site is standalone and surrounded by farmland.	3.5	Light Industrial (B1c)	Outside the built up area	The rural setting - buildings will need to remain low rise to avoid harmful impact on rural character.	3. None	Visible from the local rural lanes. The mature planting to the rear helps to blend the slab building into the wooded setting.	2. Reasonable	Generally such development is normally considered incompatible.	1. Poor	5.2	1. Poor
E/5f	Interchange		Land North of Harrowgate Drive	Birstall	South of the Borough	Recently completed development of industrial units next to A46/A6 junction. All but 0.67 ha of the 4 ha site has been built out.	4.0	Light Industrial (B1c)	Adjacent to the built up area	None	3. None	High, adjacent to the A46.	3. Good	Good. There are neighbouring residential, but these are set back from Interchange.	3. Good	4.0	1. Poor

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Internal environment*		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*			**REVIEW / RECOMMENDATION**			
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10403	Hollow Road, Anstey	Servicing possibly tight via Bradgate Rd and little room on site, but no evidence of on-site parking problems.	2. Reasonable	1.5	2. Reasonable	Vehicles need to pass through the village centre to access A46J.	1. Poor	No	Bus Stops: 16	3. Good	Single occupier - Ulverscroft - book printer	No vacancy	3. Good	Yes	No. Site built coverage is high.	Site has neighbouring residential	Safeguard
10408	Leicester Road, Anstey	There is a turning head, and dedicated parking to the rear.	2. Reasonable	0.8	3. Good	Link is via Leicester Rd.	3. Good	No	Bus Stops: 11	2. Reasonable	Manufacturing and builder's office	No vacancy	3. Good	Yes	No	school and neighbouring residential.	Safeguard
10409	Cropston Road, Anstey	Yard providing ample customer & delivery parking.	3. Good	1.2	2. Reasonable	Link is via Leicester Rd.	3. Good	No	Bus Stops: 19	3. Good	Motor repair and builders merchant	No vacancy	3. Good	Yes	Yes, low density use, but very small site to the rear of retail currently providing locally important services.	No known constraints.	Safeguard
10410	Albion Street, Anstey	Some on site parking to rear, but tight access for large vehicles off Albion Rd	1. Poor	1.3	2. Reasonable	Through residential roads and the village centre.	1. Poor	No	Bus Stops: 20	3. Good	Pest control company - likely to be storage of equipment and offices.	Possibly the larger building.	Don't Know	Maybe	The location in a predominantly residential area will limit opportunities.	Proximity of residential and access via resi roads.	Release
101311	Sileby Road, Barrow upon Soar	Both IEs have ample dedicated parking and servicing arrangements. The layout and landscaping are standard grass verges on site. The landscape buffer on the road frontage is mature and dense shielding the IEs and the heavy industrial. The heavy industry has a rail head on the line immediately adjacent.	2. Reasonable	1.6	2. Reasonable	Access to the A6 is via Slash Lane, a narrow lane but that does not pass through settlements.	2. Reasonable	No	Bus Stops: 8	2. Reasonable	General industrial. Food manufacturers and engineering.	Low in the Hayhill, but the older lower quality Sileby Rd IE has more vacancy.	2. Reasonable	Yes	Yes, the Sileby Rd units are in need of refurb/ redevelopment. The Hayhill is successful, and opportunities on the southern side of Sileby Rd should be explored.	None, other than the need for existing tenants to vacate.	Safeguard
10468	Charnwood Edge BP, Cossington	Low density, with plenty of parking and good servicing arrangements. Plentiful landscaping, that is low level, but will mature and thicken with time.	3. Good	0.1	3. Good	Immediate to the A46/A607.	3. Good	No	Bus Stops: 2	1. Poor	Office, but also transport - haulage related.	No vacancy	3. Good	Yes	Minor opportunity to intensify the central part of the site.	No known constraints.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														**REVIEW / RECOMMENDATION**			
		Internal environment		***Strategic accessibility (road)***		***Local access by road***		***Public transport access***			***Market signals***						
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
108968	East Goscote IE	Purpose built, dedicated parking and good servicing. Minimal landscaping, particularly on the eastern edge closest to the residential.	2. Reasonable	0.3	3. Good	Directly on to A607.	3. Good	No	Bus Stops: 3	1. Poor	General manufacturing and logistics	Little vacancy	3. Good	Yes	There is an outline planning permission for the remaining undeveloped area in the middle of the site (3.95 ha). Meaning the whole site will cover 10.75ha.	No known constraints.	Safeguard
10384	Byron Street Extension, Loughborough	All parking and servicing takes place in the on-site yard. No landscaping.	2. Reasonable	0.2	3. Good	A6 in close proximity, with good links to M1 north and south.	2. Reasonable	No	Bus Stops: 15	2. Reasonable	Truck and bus repair.	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10386	Station Avenue, Loughborough	Access is tight on Station Avenue, but existing use's parking and servicing requirements can take place on-site.	2. Reasonable	0.4	3. Good	Station Avenue adjoins the A6.	2. Reasonable	No	Bus Stops: 36	3. Good	Builders merchants	No vacancy	3. Good	Maybe	No. The employment site is now separated from other employment by the permission for the foodstore and the residential on the surrounding sites.	No known constraints.	Safeguard
10388	Windmill Road, Loughborough	The industrial units have a large extensive parking and servicing area on site. The site is partially screened from the surroundings.	2. Reasonable	0.5	3. Good	Great Central Rd links to the A6/A60.	2. Reasonable	No	Bus Stops: 17	3. Good	Wallpaper manufacturers	No vacancy	3. Good	Yes	The land at the end of the overflow car park could be used to extend the floorspace.	New adjacent residential	Safeguard
10390	Chainbridge Close, Loughborough	All parking and servicing associated with the building materials and the industrial units is on-site and off road.	3. Good	0.6	3. Good	Belton Rd A6004 links to A6.	2. Reasonable	No	Bus Stops: 20	3. Good	Open storage of building materials and cars.	No vacancy	3. Good	Maybe	The low intensity open storage use could be intensified, if the open storage relocates.	No known constraints.	Safeguard
10391	Hanford Way, Loughborough	Parking spilling out onto the pavements in the IE area, servicing likely to be tight. Very little soft landscaping.	1. Poor	0.7	3. Good	Meadow Lane and Belton Rd A6004 links to A6 or A60 north.	2. Reasonable	Yes	Bus Stops: 22	3. Good	Local auto related services	No vacancy	3. Good	Yes	No opportunity to expand floorspace.	No known constraints.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														**REVIEW / RECOMMENDATION**			
		Internal environment		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*						
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10392	Queens Road, Loughborough	All the big units have ample parking and servicing on-site arrangements. Large central grass verge, but little else by way of landscaping.	2. Reasonable	0.9	3. Good	Immediate access to the A60 north and south.	3. Good	Yes	Bus Stops: 22	3. Good	High tech manufacturing and coachwork repairs.	No vacancy	3. Good	Yes	No obvious opportunity to expand floorspace.	No known constraints.	Safeguard
10396	Duke Street, Loughborough	The area has adequate parking and servicing provision, which is unusual for an area that has developed incrementally over many years,	2. Reasonable	0.4	3. Good	Immediate access to the A60 north and south.	3. Good	No	Bus Stops: 24	3. Good	Car servicing and auto spares and the PO Sorting Office.	No vacancy	3. Good	Yes	The PO site could be a future opportunity.	No known constraints.	Safeguard
10398	Taylors Foundry, Loughborough	Parking and servicing to the rear.	2. Reasonable	0.8	3. Good	Close access to the A60 north and south.	2. Reasonable	No	Bus Stops: 16	2. Reasonable	Foundry	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10467	Falcon IE, Loughborough	All parking and servicing dealt with on-site. Little screening.	3. Good	1.1	2. Reasonable	Brush, the principle occupier has its own dedicated junction providing direct access on to the A60 north and south. The remainder of the site accesses A60 via Meadow Lane.	2. Reasonable	Yes	Bus Stops: 2	2. Reasonable	Manufacture - electronics (Brush)	No vacancy	3. Good	Yes	Redevelopment may be needed for Brush and other long term occupiers. No obvious means of increasing floorspace.	No known constraints.	Safeguard
101368	Charnwood Campus, Loughborough	Spacious landscaped setting, with extensive areas for parking and servicing. Some buildings on the Bakewell Rd frontage have been demolished, that has the effect of opening out views into the park.	3. Good	0.9	3. Good	Through the neighbouring IE to the A6.	3. Good	No	Bus Stops: 5	1. Poor	Vacant at the present time.	Vacant	1. Poor	Yes	Yes, extensive grounds could accommodate more floorspace.	No known constraints.	Safeguard
101371	Belton Road West, Loughborough	Purpose built collection of industrial estates. Parking and servicing for each unit are managed on-site. Generally the area is landscaped, but some areas notably Swingbridge are devoid of any landscaping.	2. Reasonable	0.7	3. Good	Immediate access onto the A6.	3. Good	No	Bus Stops: 25	3. Good	General industrial - manufacture & distribution of healthcare products, laboratory equipment and plastics.	Very little vacancy	3. Good	Yes	0.5 ha plot next to cement batching Messenger Close. Currently fully occupied, but if the sewage works were to close the site could be used to extend the IE. Possible opportunities to intensify through redevelopment in the Summerpool Rd area.	No known constraints.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														REVIEW / RECOMMENDATION			
		Internal environment		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*						
Site ID.	Site name	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/principal A roads (km)	Score	Access to site/strategic road network	Score	Is the site close to a railway station (within 400m)?	Describe - e.g. station, bus stops within a 400 m radius	Score	Main type of occupier and activities	Vacancy	Vacancy Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	Recommend-ation
101394	Meadow Lane IE, Loughborough	Purpose built small workshop units with sufficient parking and communal servicing space. The Ark is well landscaped on the Gordon Rd frontage.	3. Good	1.2	2. Reasonable	Station Boulevard to A60/A6 north and south.	2. Reasonable	Yes	Bus Stops: 18	3. Good	Local services - printing and computer repair	Possibly a few to let	2. Reasonable	Yes	No	No known constraints.	Safeguard
101398	Land off Gordon Road, Loughborough	Plenty of dedicated parking and servicing space. No landscaping, tight up to residential at the rear.	3. Good	1.1	2. Reasonable	Station Boulevard to A60/A6 north and south.	2. Reasonable	Yes	Bus Stops: 16	3. Good	Office equipment and plumbing /electrical	Both occupied	3. Good	Yes	No	No known constraints.	Safeguard
10470	Charnwood Business Park	Spacious layout with ample dedicated parking and servicing arrangements. Landscaping focused on the side of the estate with the pavilion buildings.	3. Good	1.3	2. Reasonable	North Rd links with A6004 and then A6 / A60	2. Reasonable	No	Bus Stops: 9	2. Reasonable	Manufacturers - plastic pipes & tools	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10378	Wymeswold Industrial Estate, Wymeswold	Standard IE layout with ample dedicated parking, servicing and standard grass verge landscaping.	2. Reasonable	7.3	1. Poor	The key constraint is highway access. The A60 is 8kms and the A46 6kms via Burton Lane and Melton Rd.	1. Poor	No	Bus Stops: 2	1. Poor	Mostly general industrial, but also distribution and some open storage.	Little vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10366	Queniborough IE	Unplanned layout. Tight access, parking and servicing. Units bounded by palisade fencing and no soft landscaping.	1. Poor	0.8	3. Good	Melton Road provides access to the A607.	2. Reasonable	No	Bus Stops: 7	2. Reasonable	General industrial.	Little vacancy	3. Good	Yes	The site is largely unconstrained, has good access to the road network A607 and A46. Could be redeveloped, but no prospect of adding significantly to the overall floorspace.	Minor due to residential to the north.	Safeguard
10401	Quorn Mills, Leicester Rd, Quorn	Single use site with ample dedicated parking, but servicing is constrained by the road access. Buildings are not screened from School Lane frontage.	1. Poor	1.6	2. Reasonable	A6 is close by, but vehicles need to pass through the village to access A6J.	1. Poor	No	Bus Stops: 12	2. Reasonable	Manufacturing	No vacancy	3. Good	Yes	No, only refurbishment.	Yes, setting and sensitive neighbours.	Safeguard

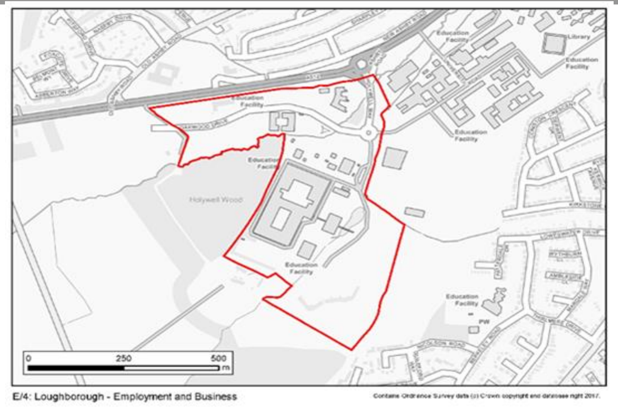
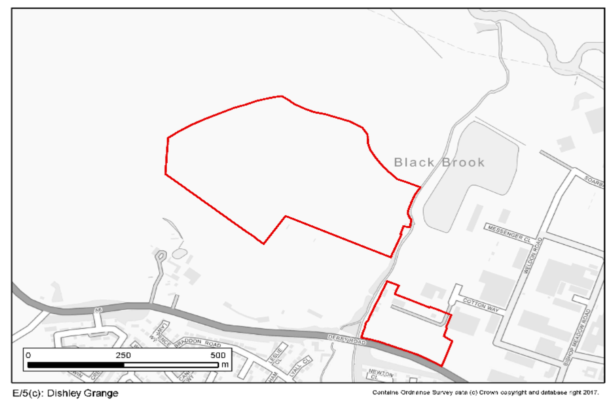
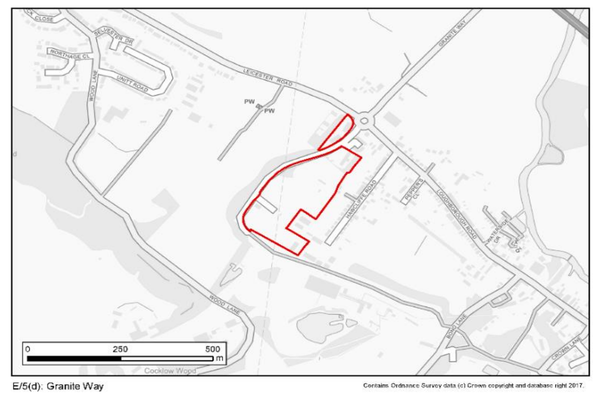
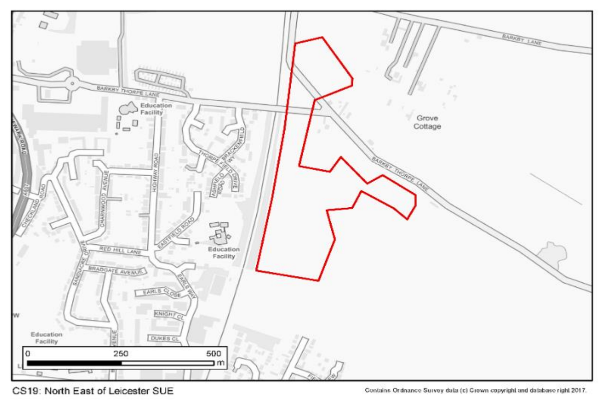
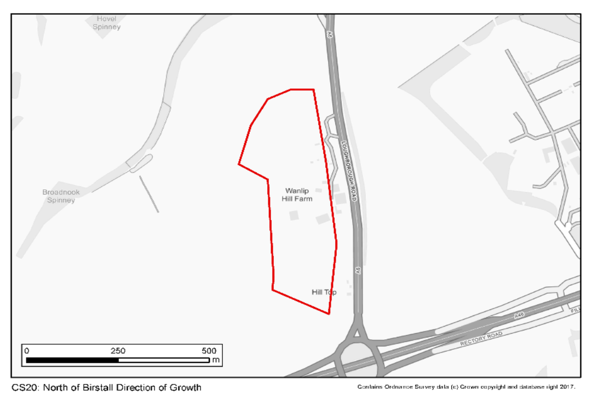
1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														**REVIEW / RECOMMENDATION**			
		Internal environment		***Strategic accessibility (road)***		***Local access by road***		***Public transport access***			***Market signals***						
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10365	Rearsby BP	All the units have ample parking and servicing arrangements, with room for turning movements on/off Gaddesby Lane. The building are not screened by a soft landscape buffer.	2. Reasonable	0.4	3. Good	Direct access within XX km of A607J.	3. Good	No	Bus Stops: 0	1. Poor	General and light industrial - food manufacturing and warehouse for retail.	No vacancy	3. Good	Yes	Potentially the land that wraps around the southern part of the site.	Potentially impact on open countryside.	Safeguard
E/4	Loughborough Science & Enterprise Park	Plentiful parking and servicing arrangements on-site. Pavilion buildings in a landscaped campus setting.	3. Good	3.3	1. Poor	Direct access on to the A512 and M1 J23 within 2 km.	3. Good	No	Bus Stops: 36	3. Good	Advanced manufacturing, energy, health & life sciences, low carbon, software & CRM, sport & sport innovation & transport technologies.	Little vacancy	3. Good	Yes	Planning permission for 6.3 ha land bordering the A512, only 2.31 ha is within the E/4 designation area. The CS identifies 77 ha of land east and west of Snell's Nook Lane for expansion.	No known constraints.	Safeguard
10381	Anson Road, Shepshed	Access issues if taken via Anson Rd, a predominantly residential road. Access better if taken via Charnwood Rd.	2. Reasonable	4.7	1. Poor	Access to M1 J23 via Charnwood Rd and the A512.	3. Good	No	Bus Stops: 17	3. Good	Temporary car parking associated with car auctions.	Some vacant units	1. Poor	Maybe	Yes, given proximity to M1 J23. Site is relatively small, but could be redeveloped to accommodate local warehousing. Recent PP for resi scheme plus 7 business units with access off Charnwood Road and Anson Road,	Access is the key constraint.	Safeguard
10383	Sullington Road, Shepshed	Some on site parking, and servicing tight off Sullington Rd. Little landscaping or buffering.	1. Poor	4.4	1. Poor	Access via residential roads to reach Leicester Rd and, A512 and M1.	1. Poor	No	Bus Stops: 21	3. Good	Single occupier. Medical laboratories.	No vacancy	3. Good	Yes	No	Surrounded by residential.	Safeguard
10411	Charnwood Road, Shepshed	Access is tight, but ample parking and yardage on site. No landscaping.	2. Reasonable	3.8	1. Poor	Need for vehicles to pass through the town centre to access the strategic road network.	1. Poor	No	Bus Stops: 13	2. Reasonable	Light industrial or warehousing.	Vacant site	1. Poor	Maybe	No obvious opportunity to increase floorspace.	Access to the road network.	Release
107798	Gelders Hall Industrial Estate, Shepshed	The two IE areas east and west of Charnwood Rd are of differing quality, with the area to the west being higher quality from a parking, servicing, landscaping and general playout perspective. The area east has less space for parking and servicing and more use of palisade fencing. Generally the building stock is much older east	2. Reasonable	5.1	1. Poor	Good link road to M1 J via A512	3. Good	No	Bus Stops: 27	3. Good	Light industrial, engineering companies.	Little vacancy	3. Good	Yes	No. The open uses east of Leicester Rd are lorry parks and Highway depot, which are likely to remain.	No known constraints.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Internal environment*		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*			**REVIEW / RECOMMENDATION**			
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10370	Manor Drive, Sileby	All units have ample parking/service yards. No landscaping on the Manor Drive frontage, but landscape buffer to the rear.	3. Good	2.3	2. Reasonable	A6 and A46 accessible, but via the village and residential roads.	1. Poor	Yes	Bus Stops: 14	1. Poor	Timber and building materials.	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10374	Oak Business Centre, Sileby	Building largely fronts the road, and parking area to the rear. Small servicing area at the front of the building. No landscaping.	2. Reasonable	2.6	2. Reasonable	Access via residential roads to A46 / A6.	1. Poor	No	Bus Stops: 5	1. Poor	Office /workshop based start ups	High, we understand 10 units are currently vacant.	1. Poor	Yes	No	The surrounding residential units.	Safeguard
10424	Barrow Road, Sileby	Site is densely developed, with some parking to the rear, but no parking at the front. Servicing appears to be on street. No landscaping.	1. Poor	1.9	2. Reasonable	Access to A6 via Barrow village, or to the A46 via Sileby village.	1. Poor	No	Bus Stops: 11	2. Reasonable	SME service companies.	Unknown	Don't Know	Yes	No	No known constraints.	Safeguard
10425	King Street, Sileby	To the rear of a residential unit, giving very limited access, parking and servicing opportunities.	1. Poor	2.0	2. Reasonable	Access is through the village.	1. Poor	Yes	Bus Stops: 17	3. Good		vacant	1. Poor	Maybe	No	No known constraints.	Safeguard
10474	Albion Rd, Sileby	Very open low density layout. Plenty of parking and yard for service vehicles. Grass verges.	2. Reasonable	2.2	2. Reasonable	Railway arches to navigate on the access roads heading into the village and towards A6/A46.	1. Poor	Yes	Bus Stops: 14	3. Good	Some engineering, but otherwise service activities.	One block vacant = 25%.	1. Poor	Maybe	Yes, more floorspace would be possible.	Proximity of neighbouring residential.	Safeguard
10360	Wanlip Road, Syston	Parking and servicing access directly from the A46 J roundabout.	3. Good	0.6	3. Good	Direct access on to A46.	3. Good	No	Bus Stops: 14	2. Reasonable	Distribution.	No vacancy	3. Good	Yes	None that would increase floorspace.	No.	Safeguard

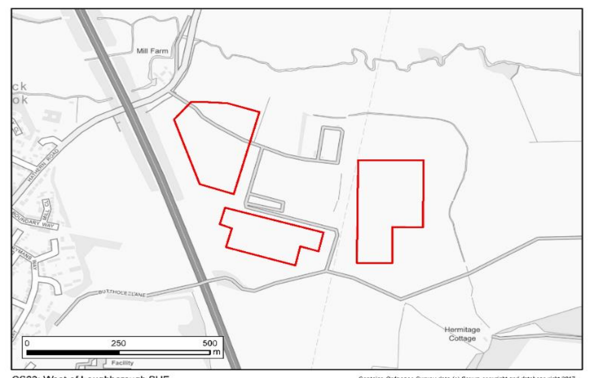
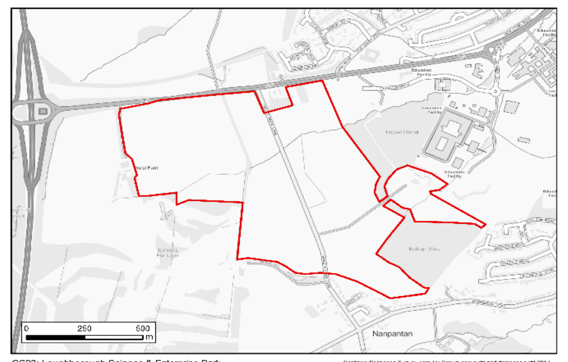
1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Internal environment*		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*			REVIEW / RECOMMENDATION			
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10363	Fosse Way, Syston	Ample parking to the rear, and internal loading bays for servicing. Site well screened on all sides.	3. Good	0.8	3. Good	Fosse Way direct link to A46 / A607.	3. Good	Yes	Bus Stops: 17	3. Good	Engineering and manufacturing.	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10364	The Half Croft, Syston	Most units have dedicated parking and service yards. Landscaping is spartan within the site, but well screened from outside.	2. Reasonable	1.2	2. Reasonable	Good via Fosse Way north to A46/607, but low railway bridge a potential issue heading south to A46J, this route also passes the Roundhill Academy.	2. Reasonable	No	Bus Stops: 10	2. Reasonable	manufacturing	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10413	High Street, Syston	This is a collection of older stock that have poor quality appearance. The dedicated parking is mostly for the trade outlets. There are no dedicated servicing areas, with deliveries taking place in the shared service yard. The site boundary is well screened, but there is no internal landscaping.	1. Poor	1.2	2. Reasonable	A low railway bridge a potential issue heading north to Fosse Way/A46/A607J. Travelling south requires vehicles to pass through Syston centre.	1. Poor	No	Bus Stops: 14	2. Reasonable	Manufacturing and distribution.	No vacancy	3. Good	Yes	Not that will add to the floorspace.	Yes, neighbouring residential.	Safeguard
10415	Brook Street, Syston	The industrial units have forecourt parking, but servicing is undertaken on the residential street. Servicing for the breakers yard takes place on site, but Brook St is a narrow residential street poorly suited to servicing vehicles.	1. Poor	1.5	2. Reasonable	A low railway bridge a potential issue heading north to Fosse Way/A46/A607J. Travelling south requires vehicles to pass through Syston centre.	1. Poor	No	Bus Stops: 11	2. Reasonable	Manufacture and truck breakers.	No vacancy	3. Good	Maybe	The open yard could be redeveloped.	The neighbouring residential.	Release
10418	St. Peter's Street, Syston	The warehouse units have dedicated parking and servicing areas. No landscaping.	2. Reasonable	1.6	2. Reasonable	The site is in a residential area, and requires vehicles to pass through the centre to access the road network.	1. Poor	No	Bus Stops: 13	2. Reasonable	Storage of domestic products and building equipment.	No vacancy	3. Good	Maybe	No. Little scope to increase the floorspace.	The poor access to the strategic road network is a constraint on redevelopment of this site.	Release
10419	Cross Street, Syston	The environment is poor, with little provision for parking and servicing on narrow streets. The building lines are all forward, with no space for landscaping, making for a poor quality environment.	1. Poor	2.2	2. Reasonable	The site is in a residential area, and requires vehicles to pass through the centre to access the road network.	1. Poor	No	Bus Stops: 17	3. Good	Engineering and manufacturing.	No vacancy	3. Good	Maybe	No. Little scope to increase the floorspace. No evidence of sites having been redeveloped in the past.	The area's predominantly residential nature and the access issues.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														REVIEW / RECOMMENDATION			
		Internal environment		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market signals*						
Site ID.	Site name	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/principal A roads (km)	Score	Access to site/strategic road network	Score	Is the site close to a railway station (within 400m)?	Describe - e.g. station, bus stops within a 400 m radius	Score	Main type of occupier and activities	Vacancy	Vacancy Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	Recommend-ation
10420	Melton Road, Syston	The buildings' style, materials and age match the adjoining residential. There is a dedicated parking and delivery yard. No landscaping.	2. Reasonable	1.8	2. Reasonable	The site is in a residential area, and requires vehicles to pass through the centre to access the road network.	1. Poor	Yes	Bus Stops: 11	3. Good	Engineering	No vacancy	3. Good	Maybe	Not for the existing type of occupier. The buildings are largely outdated for efficient engineering use.	No known constraints.	Safeguard
107506	Watermead BP, Syston	High quality layout, and arrangements for parking and servicing. All set in a parkland landscape.	3. Good	1.0	2. Reasonable	Access directly onto the A607.	3. Good	No	Bus Stops: 14	2. Reasonable	HQ office buildings for a number of corporate businesses.	No vacancy	3. Good	Yes	Yes, two sites off Rayns Way.	No known constraints.	Safeguard
10352	Wheatleys Road, Thurmaston	Main engineering block is set back from the road allowing on-site parking and servicing. Building styles in the group are varied.	2. Reasonable	2.8	2. Reasonable	Access on to the A607 via Melton Rd.	2. Reasonable	No	Bus Stops: 17	3. Good	Engineering	No vacancy	3. Good	Yes	Site coverage is already high, so little scope for intensification.	None other than residential to the rear.	Safeguard
10355	Humberstone Lane, Thurmaston	All parking and servicing is managed on site, an the site is landscaped so as to provide a screening buffer to surrounding uses.	3. Good	3.3	1. Poor	Humbestone Rd links to both the A607 and A563. Both routes are suitable for large vehicles.	2. Reasonable	No	Bus Stops: 16	3. Good	Engineering	No vacancy	3. Good	Yes	No	No known constraints.	Safeguard
10358	Earls Way IE, Thurmaston	Generally parking and servicing is achieved off site in dedicated areas. But some of the smaller units with less/no dedicated parking leads to on-street parking and servicing. Landscaping is the ubiquitous grass verge.	2. Reasonable	2.9	2. Reasonable	Via routes (Highway Rd and Church Hill Rd) through Thurmaston (both routes require vehicles to pass primary schools - Church Hill and Bishop Ellis) to join the A607 north and south.	1. Poor	No	Bus Stops: 21	3. Good	Industrial (food) and engineering	No vacancy	3. Good	Yes	The site's poor road linkages to the strategic network on narrow routes passing schools mean the site would be more appropriate for an alternative use that did not generate large goods vehicle movements.	The site access is poor requiring heavy goods vehicles to pass through residential areas and past schools.	Release
10464	Melton Road, Thurmaston	All parking and servicing requirements are managed on site, and the site is landscaped.	3. Good	1.8	2. Reasonable	Direct access onto the A607.	3. Good	No	Bus Stops: 11	2. Reasonable	Printer, manufacturers & bus yard.	No vacancy	3. Good	Yes	Yes, north of the roundabout there is unused land.	No known constraints.	Safeguard

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION														**REVIEW / RECOMMENDATION**			
		Internal environment		***Strategic accessibility (road)***		***Local access by road***		***Public transport access***			***Market signals***						
Site ID.	**Site name**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/principal A roads (km)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, bus stops within a 400 m radius**	**Score**	**Main type of occupier and activities**	**Vacancy**	**Vacancy Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Are there any constraints on redevelopment / intensification / extension?**	**Recommend-ation**
10465	Pinfold Road, Thurmaston	Both areas are adequately provided for in terms of parking and servicing with most units having dedicated provision. Both are dated in layout, with very little soft landscaping and use of palisade fencing in the IE.	2. Reasonable	2.8	2. Reasonable	Easy close access onto the A607 via Pinfold Rd.	3. Good	No	Bus Stops: 13	2. Reasonable	BP a number of social services and charity organisations, but also small scale manufacturing and engineering. IE manufacturing and plant hire.	Possibly in the BP, but no known vacancy in the IE.	3. Good	Yes	The site is a good location for employment, albeit because of the links to the strategic road network, better for industry than office. The units in the Business Park and Estate are of reasonable quality and mostly occupied. The employment uses do conflict with the leisure activity in the adjacent Watermead Country Park, but without finding a 13 ha site to relocate these businesses to the site should remain in employment use.	No known constraints.	Safeguard
10377	Land off Wymeswold Lane, Wymeswold	All parking and servicing is on site, with the main issue the narrowness of the access lane from Melton Rd. The site sits within a rural landscape.	2. Reasonable	6.5	1. Poor	The key constraint is highway access. The A60 is 7kms and the A46 is 5kms.	1. Poor	No	Bus Stops: 2	1. Poor	Single manufacturer on site.	No vacancy	3. Good	Yes	No	Poor connectivity and impact on rural setting.	Safeguard
E/5f	Interchange	Parking and servicing has been provided to a high quality and all on site.	3. Good	Immediate access to the A6/A46	3. Good	Link road provides direct access to A6.	3. Good	No	Bus Stops: 3	1. Poor	Manufacturing and distribution.	No vacancy	3. Good	Yes	0.67 ha remains available for development.	No known constraints.	Safeguard

1 Site ID.	2 BASIC INFORMATION Site name	3 Site location map	4 Site address	5 Centre	6 Market area	7 Site description	8 Current use	9 Is the site previously developed land?	10 Site area (ha)	11 Site's sequential location	12 Proposed principle use	13 Any planning designations	14 Planning History	15 Does the site play a role in advancing wider policy aspirations.	16 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	17 Overall constraints?	18 Is this site available?	19 Comment
E/4	Loughborough Science Park		Holywell Way	Loughborough	(Loughborough)	Site now largely developed following the recent completion of the new Advanced Technology and Innovation Centre.	Science Park	No	2.3	Outside the built up area	R&D	LP allocation.	Overall 26.4ha was allocated, but 2.31 ha remaining undeveloped. PP for overlapping site bordering the A512 - 2.31 ha within the E4 designation and 4.4 ha beyond - totalling 6.7ha.	Yes, the extending the Science and Enterprise Park is a critical priority in the Council's Corporate Plan and Regeneration Strategy and is central to the Council's Vision.	No known constraints to the development of the remaining 2.3 ha.	3. None	3. Immediately available	-
E/5c	Dishley Grange		Hathern	Hathern	Loughborough	Farm land	Agriculture	no	22.5	Within 400m of a town centre	Mix of B1c/B2/B8	LP allocation	PP for 9.5 ha of: B1a/b 3,800 sq m B1c/B8 35,000 sq m	Not known	The site is within Environment Agency FZ3, which would require considerable mitigation costs to make development possible. There would also be a need for an expensive junction on A6.	1. Major	4. Not known	The site's constraints in terms of flood risk mitigation and access are thought to render development unviable.
E/5d	Granite Way, Mountsorrel		Mountsorrel	Mountsorrel	Rural	The land furthest to the north has been built out for office. The bulk of the site remains occupied by the household recycling centre and Highways Depot.	Municipal	Yes	4.9	Adjacent to the built up area	B1c-B8	LP allocation	Not known	Not known	Redevelopment requires the relocation of existing municipal functions.	1. Major	2. Available in the plan period	Relocation of highways depot and waste management would be a large & time consuming commitment.
E/5e	Land at Rothley Lodge		Rothley Lodge	Rothley	Rural	Half the site has been built out for industrial/warehousing (paper manufacture). The remaining site has recently been acquired for development for manufacturing and light industrial.	Manufacturing and warehousing	No	5.6	Outside the built up area	B1c/B2	LP allocation	12.6ha overall, but 5.6ha remaining undeveloped. A planning application is anticipated in the near future.	Not known	None	3. None	3. Immediately available	This site is unconstrained.
CS19	North East of Leicester SUE		Barkby Thorpe Lane	Thurmaston	South of the Borough	The area within the wider SUE indicatively identified for employment is an area bounded by Barkby Thorpe Lane and the railway.	Agriculture	No	13.0	Outside the built up area	B1a, B1c and B2 (mixed employment)	CS allocation	None	Yes - regeneration of Thurmaston and NE Leicester and better access to shops, services and other facilities for community east of the railway line.	Access is likely to be a constraint to employment activity requiring large vehicles due to the narrowness of the only access link west - Barkby Thorpe Lane.	1. Major	2. Available in the plan period	Possibly towards the end of the Plan period. The site is reliant on highway infrastructure improvements taking place to enable access.
CS20	North of Birstall SUE (Direction of Growth)		Loughborough Road	Birstall	South of the Borough	Employment area adjacent to the A6 (Loughborough Road) within the wider new North of Birstall Garden Suburb.	Horticulture and agriculture	No	15.0	Outside the built up area	B1a, B1c,B2 and possibly B8 given its location in respect of the strategic road network (mixed employment)	CS allocation	None	No	No known constraints.	3. None	2. Available in the plan period	The employment uses cannot come forward until the Garden Suburb has been master planned and approved. Thus delivery could be towards the end of the Plan period.
CS21	Watermead Regeneration Corridor		Adjoining the A607/A46.	Syston	South of the Borough	Effectively three parcels - north and south of the Wanlip Road and the third north of A46, all within the wider Watermead regeneration Corridor.	Open land with lakes.	Yes	12.0	Within 400m of a town centre	Expansion of Watermead Business Park that lies to the east of A607 - this could be a range of employment uses.	CS allocation	Overall site area 23.75ha (North of A46: 5.93 South of A46: 17.82). The Core Strategy map indicates the area north of A46 is not within the regeneration corridor. The developable area is 12ha, restricted to the area south of A46. PP for circa 13,000 sq m industrial. Recent screening application refers to a broad range of employment uses, but not light industrial.	Yes, access to nature and recreation opportunities for some of the most deprived neighbourhoods in the Borough. Opportunity to improve the environment to encourage the regeneration of Thurmaston.	Flooding from the River Soar (FZ2).	2. Minor	3. Immediately available	Watermead Phases ii & iii should be encouraged to come forward in an acceptable employment mix as soon as possible.

Existing allocations

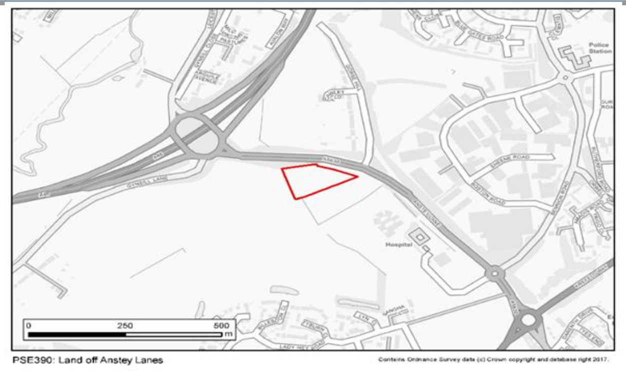
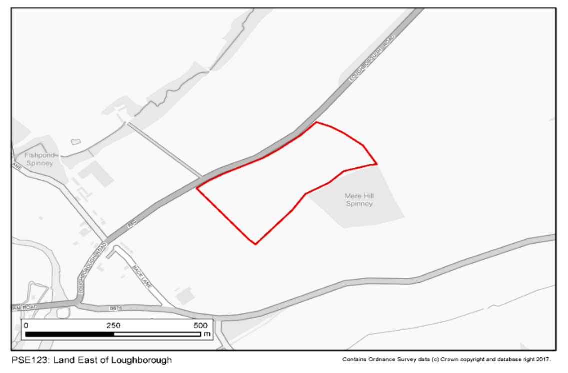
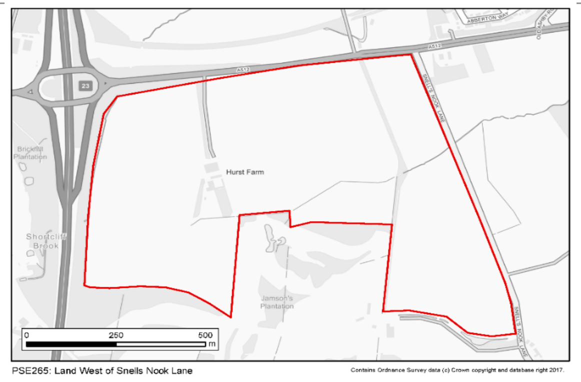
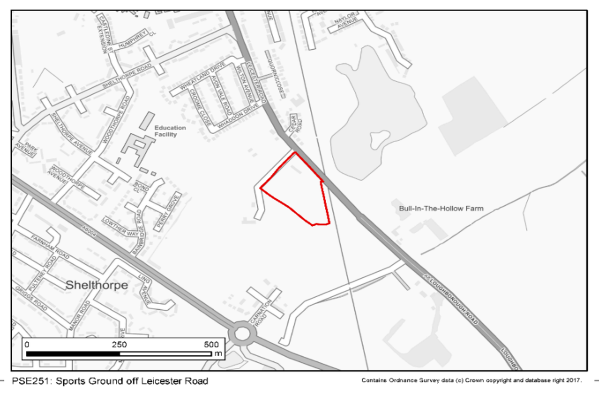
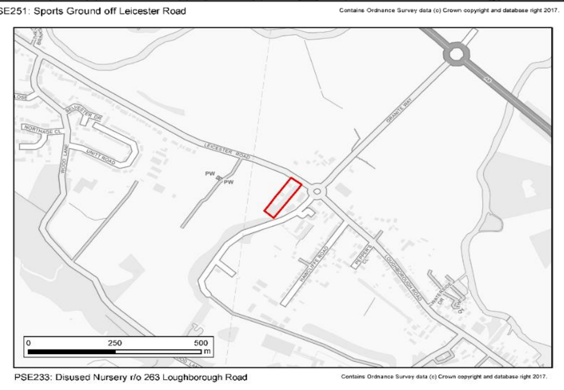
1 BASIC INFORMATION Site ID.	2 Site name	3 Site location map	4 Site address	5 Centre	6 Market area	7 Site description	8 Current use	9 Is the site previously developed land?	10 Site area (ha)	11 Site's sequential location	12 Proposed principle use	13 Any planning designations	14 Planning History	15 Does the site play a role in advancing wider policy aspirations.	16 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	17 Overall constraints?	18 Is this site available?	19 Comment
CS22	West of Loughborough SUE	 CS22: West of Loughborough SUE	North of Ashby Road.	Loughborough	Loughborough	The area is currently mostly farm land. The three employment areas identified in the SUE masterplan, are indicatively shown located adjacent to the sewage treatment works and civic amenity site.	Agriculture	No	16.0	Adjacent to the built up area	B1a, B1c,B2 and B8 given its location in respect of the strategic road network (mixed employment).	CS allocation	Extant PP for 6.4 and 9.6 ha of B1a/b.	No	The areas identified for employment are not located in the most advantageous locations for employment use.	2. Minor	2. Available in the plan period	The disadvantages of the site selected for employment uses may be overcome if the road link to the motorway junction is of a specification required by larger road vehicles, or if the employment activity were relocated closer to the motorway junction.
CS23	Loughborough Science & Enterprise Park	 CS23: Loughborough Science & Enterprise Park	Land east and west of Snell's Nook Lane	Loughborough	(Loughborough)	Farm land	Agriculture	No	78.4	Outside the built up area	R&D	LP allocation	No known.	Yes, the extending the Science and Enterprise Park is a critical priority in the Council's Corporate Plan and Regeneration Strategy and is central to the Council's Vision.	Requires transport infrastructure improvements planned for 2021/22 as part of he W Loughborough SUE (to the north of the A512). Habitats to be incorporated into the campus setting.	2. Minor	2. Available in the plan period	-

Existing allocations

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39
BASIC INFORMATION		ATTRACTIVENESS TO OCCUPIERS																REVIEW / RECOMMENDATION			
		External environment						*Internal environment*		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market Signals*	Overall Review			
Site ID.	**Site name**	**Prominence of site**	**Score**	**Compatibility of surrounding uses**	**Score**	**Access to amenities**	**Score**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway/principal roads (kms)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Is the site likely to be attractive to employment occupiers?**	**Is the site suitable for the assessed use?**	**Assuming constraints are resolved, what are the prospects of the site being developed and occupied?**	**Recommendation**
E/4	Loughborough Science Park	High, located immediately adjacent to the existing campus.	3. Good	Good, campus and farmland.	3. Good	On site	3. Good	None known	3. Good	Immediate access to A512, and 2.3 to M1 J23	3. Good	Immediate access to A512, which provides a high quality duelled carriageway link to the M1 without passing through any settlements.	3. Good	No	Bus Stops: 36	3. Good	LUSEP have planning permission to develop the site plus an overlapping area.	3. Yes	Yes	No known constraints	Retain
E/5c	Dishley Grange	Low	1. Poor	Neighbouring industrial uses to the east, albeit separated by the Black Brook floodplain.	2. Reasonable	None	1. Poor	None	3. Good	Immediately adjacent to A6	2. Reasonable	Would need direct access on to the A6, but this would increase costs substantially. Alternative would be to route through the adjacent Belton Rd IE, but highly unlikely to be able to bridge the Black Brook at this point.	1. Poor	No	Bus Stops: 16	3. Good	An extant planning permission, but we understand the prohibitive costs associated with addressing the constraints has curtailed interest.	2. Maybe	No	Low	Deallocate
E/5d	Granite Way, Mountsorrel	Low		The site is next to a Tarmac aggregates quarry that may inhibit many other cleaner industrial uses.	2. Reasonable	Close to supermarket.	2. Reasonable	Site does have a challenging gradient.	2. Reasonable	1.0 to the A6	2. Reasonable	Granite Way is a high quality built for purpose route to the strategic road network.		No	Bus Stops: 6	2. Reasonable	Unknown	2. Maybe	On balance the site is best occupied by the existing uses. This is because of the site gradient and the neighbouring aggregates quarry that would only be attractive to other heavy industrial uses. These are unlikely to fit on a 5 Ha site, and would be unpopular locally.	Low - This is largely in use for employment, and no longer represents net additional land.	Retain
E/5e	Land at Rothley Lodge	Moderate, just off the A6	2. Reasonable	Fronts the A6 and backs onto a paper manufacturing facility.	3. Good	None	1. Poor	None	3. Good	Immediate access to A6	3. Good	Good	3. Good	No	Bus Stops: 2	1. Poor	Yes owner has stated publicly that they are actively pursuing a scheme.	3. Yes	Yes	High	Retain
CS19	North East of Leicester SUE	Low (backing on to railway). Will suit B1c/B2 more than B1a.	1. Poor	Good - buffered by the railway to the west.	3. Good	Will be close to new local centre.	3. Good	There are gradient issues, but not significant.	3. Good	Circa 2.0 to J 607	2. Reasonable	Poor, in addition to the constriction at the railway bridge on Barkby Lane, the route to the strategic road network (A607/A46) is through residential areas and Barkby Lane in particular is unlikely to be suitable for heavy goods vehicles.	1. Poor	No	Bus Stops: 7, but this will improve.	2. Reasonable	Not known	2. Maybe	Yes, but more suitable for light industrial rather than office.	High	Retain
CS20	North of Birstall SUE (Direction of Growth)	High - fronting the A6.	3. Good	Surroundings are currently horticultural/agricultural, and thus large shed format employment will need screening and possibly buffering with other uses to avoid conflict with more sensitive uses such as housing.	1. Poor	Will be close to new local centre.	3. Good	None	3. Good	Immediate access to the A6, and 0.8 to the A46.	3. Good	Good	3. Good	No	Bus Stops: 6	2. Reasonable	Not known	3. Yes	Yes, high prominence, close to future amenities and good access to the strategic road network make it a desirable site for the full range of employment uses.	High	Retain
CS21	Watermead Regeneration Corridor	High - at the junction of A46/607	3. Good	Adjacent to Watermead Phase I, and so is highly compatible.	3. Good	Good - close to Syston	3. Good	The developable area is restricted to the parcels either side of Wanlip Road that are connected by a narrow strip of land that can provide access only.	3. Good	Immediate access to A607/A46, and A6 within 2.5km.	3. Good	Good - access infrastructure already available on site.	3. Good	No	Bus Stops: 8	2. Reasonable	Watermead developer progressing screening opinion.	3. Yes	Yes.	High	Retain

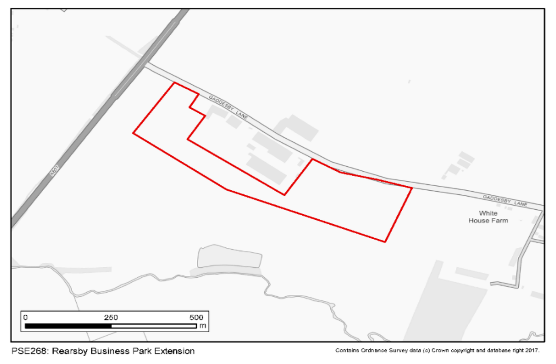
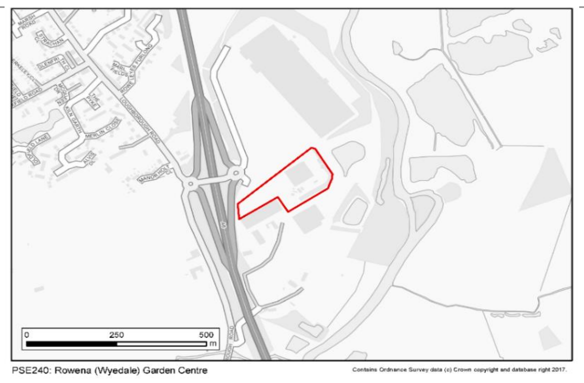
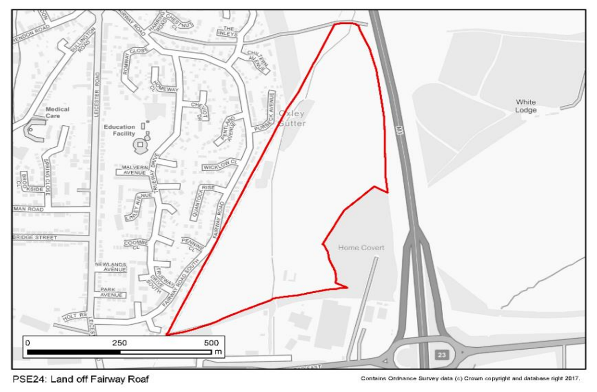
1 BASIC INFORMATION	2	20 ATTRACTIVENESS TO OCCUPIERS *External environment*	21	22	23	24	25	26 *Internal environment*	27	28 *Strategic accessibility (road)*	29	30 *Local access by road*	31	32 *Public transport access*	33	34	35 *Market Signals*	36 REVIEW / RECOMMENDATION Overall Review	37	38	39
Site ID.	**Site name**	**Prominence of site**	**Score**	**Compatibility of surrounding uses**	**Score**	**Access to amenities**	**Score**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway/principal roads (kms)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Is the site likely to be attractive to employment occupiers?**	**Is the site suitable for the assessed use?**	**Assuming constraints are resolved, what are the prospects of the site being developed and occupied?**	**Recommendation**
CS22	West of Loughborough SUE	Poor	1. Poor	Good - motorway and farmland.	3. Good	Will be close to new local centre.	3. Good	None	3. Good	Circa 2.3 if new direct link introduced to link with the A512, and 3.0 to M1 J23.	2. Reasonable	Potentially good.	3. Good	No	Bus Stop: currently 0	1. Poor	Masterplan prepared in 2015. Unknown if there has been developer activity since.	3. Yes	Yes, but will require suitable link road access, and could be more suitable if located closer to the motorway junction.	High	Retain
CS23	Loughborough Science & Enterprise Park	High, located immediately adjacent to the existing campus.	3. Good	Good, campus and farmland.	3. Good	On site	3. Good	None known	3. Good	Immediate access to the A512 via Snell's Nook Lane, and 1.0 to the M1 J23.	3. Good	This extension site is served by a separate access point to the main LSEP site.	3. Good	No	Bus Stops: 2	1. Poor	Allocation taken forward in partnership with LUSEP.	3. Yes	Yes	High	Retain

There is no need to allocate any additional sites for general B class employment. However we recommend allocating PSE24 because it is the only site capable of accommodating some large unit as well as smaller unit employment space.

1 BASIC INFORMATION Site ID.	2 Site name	3 Site location map	4 Site address	5 Centre	6 Market Area	7 Site description	8 Current use	9 Is the site previously developed land?	10 Site area (ha)	11 Site's sequential location	12 Proposed principle use	13 Any planning designations	14 Planning History	15 Does the site play a role in advancing wider policy aspirations.	16 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	17 Overall constraints?	18 Is this site available?	19 Comment
PSE390	Land off Anstey Lane		Anstey Lane		South of the Borough	Open land backing onto farmland south of the A46 junction with Leicester Road.	None. Possibly used in recent past for waste tipping.	No	1.2	Adjacent to the built up area	Industrial	None	Not known	No	Concern over the need for a new access on to the A5630 so close to a major gyratory.	1. Major	3. Immediately available	The site has potential given its locational advantages. Safe access onto the A5630 is the key issue.
PSE350	Charnwood Edge		Charnwood Edge Business Park		Rural	This is a very small parking area in the middle of the Business Park.	Parking	Yes	0.2	Outside the built up area	Industrial	None	Not known	No	None	3. None	3. Immediately available	-
PSE123	Land East of Loughborough		Loughborough Rd	Cotes	Rural	Arable farmland	Agriculture	No	8.4	Outside the built up area	Industrial	None	None	No	Site is in open countryside, which restricts the scale and mass of what could be provided. Access for large vehicles is poor via a single carriageway road.	1. Major	3. Immediately available	The rural location , narrowness of the access road and long distance to the strategic road network, are severe limitations for this site.
PSE265	Expansion of Loughborough Science and Enterprise Park		Land West of Snell's Nook Lane	Loughborough	(Loughborough)	Farm land bounded by M1/A507, golf club and LSEP. Land overlaps with CS23.	Agriculture	No	64.7	Outside the built up area	R&D	Part of the site is included in CS23.	None	Yes, the extending the Science and Enterprise Park is a critical priority in the Council's Corporate Plan and Regeneration Strategy and is central to the Council's Vision.	Requires transport infrastructure improvements planned for 2021/22 as part of he W Loughborough SUE (to the north of the A512). Habitats to be incorporated into the campus setting.	2. Minor	2. Available in the plan period	-
PSE251	Sports Ground off Leicester Road, Loughborough		Leicester Road	Loughborough	Loughborough	Sports ground next to crematorium and bounded by the railway, with new housing development to the rear. There are no other employment uses in the vicinity.	Playing fields	No	2.2	Within the built up area	Mixed use including industrial.	None	Not known	No	The principle constraints are the need to demonstrate the sports pitches are no longer needed (CS15), and that the site is relatively small to accommodate industrial and residential uses.	1. Major	4. Not known	Even if the lack of need for the sports pitches could be demonstrated, the lack of critical mass of industrial activity in the vicinity is a major constraint.
PSE233	Disused Nursery r/o 263 Loughborough Road		Loughborough Road	Mountsorrel	Rural	Site to the rear of the recently built office buildings on Granite Way.	Disused former plant nursery.	Yes	0.5	Adjacent to the built up area	B1a or B1c/2	None	Not known	No	None other hand the site is very small for industrial uses.	2. Minor	3. Immediately available	The small and narrow site limit opportunities, but possibly suited for local services use.
PSE107	Land at Farley Way		Farley Way	Quorn	Rural	Farmland/paddock on the edge of Quorn village.	Agriculture / paddocks	No	3.3	Adjacent to the built up area	Industrial	None	Not known	No	None	3. None	3. Immediately available	This site appears to be unconstrained.

Possible sites

There is no need to allocate any additional sites for general B class employment. However we recommend allocating PSE24 because it is the only site capable of accommodating some large unit as well as smaller unit employment space.

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16 CONSTRAINTS	17	18	19
Site ID.	Site name	Site location map	Site address	Centre	Market Area	Site description	Current use	Is the site previously developed land?	Site area (ha)	Site's sequential location	Proposed principle use	Any planning designations	Planning History	Does the site play a role in advancing wider policy aspirations.	Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	Overall constraints?	Is this site available?	Comment
PSE349	Rearsby Business Park		Gaddesby Lane	Rearsby	Rural	Farmland immediately to the rear of existing business park	Agriculture	No	1.3	Outside the built up area	Industrial	None. But the site would need to be tested against the Landscape and countryside policies in the Development Plan.	Not known	No	No known physical constraints, but the tests set out in the Landscape and countryside policies in the Development Plan could constrain development at the site.	1. Major	2. Available in the plan period	Site available, but needs to pass the suitability test in terms of satisfying planning policy.
PSE268	Rearsby Business Park Extension		Gaddesby Lane	Rearsby	Rural	Farmland adjacent to existing business park	Agriculture	No	10.9	Outside the built up area	Industrial	None. But the site would need to be tested against the Landscape and countryside policies in the Development Plan.	Not known	No	No known physical constraints, but the tests set out in the Landscape and countryside policies in the Development Plan could constrain development at the site.	1. Major	2. Available in the plan period	Site available, but needs to pass the suitability test in terms of satisfying planning policy.
PSE240	Rowena (Wyedale) Garden Centre, Loughborough Road		Loughborough Road	Rothley	Rural	Garden centre with direct access to the A6, located between industrial premises to the south and the recent manufacturing facility to the north at Rothley Lodge.	Garden centre	Yes	2.4	Outside the built up area	Industrial	None	Not known	No	None known	3. None	3. Immediately available	Dependent on the owner/occupier's intentions this site could be available for redevelopment for industrial use.
PSE24	Land off Fairway Road		Fairway Road	Shepshed	Shepshed	Farmland bounded by the M1 and a copse to the east and housing to the west, and industrial used to the south off Ashby Road.	Agriculture	No	24.9	Adjacent to the built up area	Industrial	None	None	No	The site has a noticeable gradient, sloping down from north to south. At present it does not have access onto Ashby Road. No other known constraints.	2. Minor	2. Available in the plan period	The site's true availability will depend on whether the owner / farmer was involved in the site coming forward through the call for sites.
PSE69	Land South East of Syston		Barkby Lane	Syston	South of the Borough	Farm land adjacent to the railway line south of Syston. Immediately to the south is the land identified for the NE Leicester SUE.	Agriculture	No	8.9	Within the built up area	Industrial	None	None	No	The key constraint is vehicle access because of the narrowness of Barkby Lane and the constriction (one way traffic light controlled crossing) at the railway bridge. This is a major impediment to the movement of large vehicles that would need to cross the bridge.	1. Major	2. Available in the plan period	Highway issues may limit the suitability to take this site forward.

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39
BASIC INFORMATION		**ATTRACTIVENESS TO OCCUPIERS**																**REVIEW / RECOMMENDATION**			
		External environment						***Internal environment***		***Strategic accessibility (road)***		***Local access by road***		***Public transport access***			***Market Signals***				
Site ID.	**Site name**	**Prominence of site**	**Score**	**Compatibility of surrounding uses**	**Score**	**Access to amenities**	**Score**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway/principal roads (kms)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Is the site likely to be attractive to employment occupiers?**	**Is the site suitable for the assessed use?**	**Assuming constraints are resolved, what are the prospects of the site being developed and occupied?**	**Recommendation**
PSE390	Land off Anstey Lane	Fair	2. Reasonable	The hospital to the south would be an issue for some industrial activity, but otherwise no issues.	2. Reasonable	None	1. Poor	None, other than current size limitations. 1.2 ha is a small area.	3. Good	Immediate access to the A5630, and 0.4 to the A46.	3. Good	Good	3. Good	No	Bus Stops: 2	1. Poor	None known	3. Yes	Not as proposed, but could work with a larger site and access to the road network.	High	Do not allocate
PSE350	Charnwood Edge	Fair	2. Reasonable	Good, surrounded by industrial and office uses.	3. Good	None	1. Poor	None	3. Good	Immediate access to the A607 and A46.	3. Good	Good	3. Good	No	Bus Stops: 2	1. Poor	Promoted by Merriman.	3. Yes	Yes	High. A site within an existing designation. No need to allocate.	Do not allocate
PSE123	Land East of Loughborough	Low	1. Poor	Poor, as surrounded by farmland.		None	1. Poor	None known	3. Good	3.6 to A6 (Loughborough)	1. Poor	Poor, access to the A6 Loughborough is via country roads and through Loughborough town centre.	1. Poor	No	Bus Stops: 2		None known	3. No	No	Low	Do not allocate
PSE265	Expansion of Loughborough Science and Enterprise Park	high, located immediately adjacent to the existing campus.	3. Good	Good, campus and farmland.	3. Good	On site	3. Good	None known	3. Good	Immediate access to the A512 via Snell's Nook Lane, and 1.0 to the M1 J23.	3. Good	This extension site is served by a separate access point to the main LSEP site.	3. Good	No	Bus Stop: 5	2. Reasonable	Allocation taken forward in partnership with LUSEP.	3. Yes	Yes	High	Allocate
PSE251	Sports Ground off Leicester Road, Loughborough	Fair	2. Reasonable	Good	3. Good	Poor	1. Poor	None	3. Good	Immediate access to the A6.	3. Good	A6 south is good quality fast road, but north routes through Loughborough town centre.	2. Reasonable	No	Bus Stop: 6	2. Reasonable	None known	2. Maybe	Yes	Medium, advantages of location and prominence, but as most businesses seek to congregate to benefit from working with compatible activities, which would not be available here. Only allocate if there is conclusive justification for loss of sports pitches.	Do not allocate
PSE233	Disused Nursery r/o 263 Loughborough Road	Fair	2. Reasonable	Next to recently completed office buildings.	3. Good	Food superstore close by.	2. Reasonable	Small narrow site	1. Poor	0.6 to the A6	2. Reasonable	Granite Way is a high quality built for purpose route to the strategic road network.	3. Good	No	Bus Stop: 5	2. Reasonable	None known	2. Maybe	Yes	Medium, it may be too small to make the development viable.	Do not allocate
PSE107	Land at Farley Way	Fair, the location is on the edge of a village, but on a roundabout close to accessing the A6.	2. Reasonable	Fair, mostly surrounding farmland and highway, albeit new housing has recently been constructed to the rear.	2. Reasonable	In the village centre.	2. Reasonable	None	3. Good	Immediate access to the A6.	3. Good	Good	3. Good	No	Bus Stop: 5	2. Reasonable	None known	3. Yes	Yes	High. However, the site may be equally attractive as a housing site. No need to consider allocating as sufficient sites allocated, but would be a suitable site if it does come forward for employment use.	Do not allocate

Possible sites

1 BASIC INFORMATION	2	20 ATTRACTIVENESS TO OCCUPIERS *External environment*	21	22	23	24	25	26 *Internal environment*	27	28 *Strategic accessibility (road)*	29	30 *Local access by road*	31	32 *Public transport access*	33	34	35 *Market Signals*	36 REVIEW / RECOMMENDATION	37	38	39
Site ID.	**Site name**	**Prominence of site**	**Score**	**Compatibility of surrounding uses**	**Score**	**Access to amenities**	**Score**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway/principal roads (kms)**	**Score**	**Access to site/strategic road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Describe - e.g. station, number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Is the site likely to be attractive to employment occupiers?**	**Is the site suitable for the assessed use?**	**Assuming constraints are resolved, what are the prospects of the site being developed and occupied?**	**Recommendation**
PSE349	Rearsby Business Park	low	1. Poor	Low	1. Poor	Poor	1. Poor	None	3. Good	0.4 to the A607 and 4.5 to A46.	2. Reasonable	Fair - access to the A607 is via Gaddesby Lane, which is a short stretch of straight single carriageway. The A607 is also single carriageway, but avoids passing through settlements to link up with the A46, Leicester Bypass.	2. Reasonable	No	None	1. Poor	None known	3. Yes	If the scale and character are proportionate and provided there is no discernible harm in landscape terms the site would be suitable for its intended use.	High - but currently no need to allocate.	Do not allocate
PSE268	Rearsby Business Park Extension	low	1. Poor	Low	1. Poor	Poor	1. Poor	None	3. Good	0.4 to the A607 and 4.5 to A46.	2. Reasonable	Fair - access to the A607 is via Gaddesby Lane, which is a short stretch of straight single carriageway. The A607 is also single carriageway, but avoids passing through settlements to link up with the A46, Leicester Bypass.	2. Reasonable	No	None	1. Poor	None known	3. Yes	If the scale and character are proportionate and provided there is no discernible harm in landscape terms the site would be suitable for its intended use.	High - but currently no need to allocate.	Do not allocate
PSE240	Rowena (Wyedale) Garden Centre, Loughborough Road	Low, the site is not visible from the A6.	1. Poor	High, neighbouring industrial uses.	3. Good	poor	1. Poor	None	3. Good	Immediate access to A6	3. Good	Good		No	Bus Stops: 2	1. Poor	None known	3. Yes	Yes	High. A relatively small site, but well located in terms of access and neighbouring uses. No need to allocate as the nursery garden centre would need to relocate before it could come forward, which introduces a degree of risk that the other favoured sites do not have.	Do not allocate
PSE24	Land off Fairway Road	Low, sited to the rear of housing area and industrial area.	1. Poor	Fair, due to proximity of housing, but access can avoid housing and room for a substantial landscaped screen.	2. Reasonable	Poor	1. Poor	The site's slope down from north to south will require levelling for the buildings, adding to cost.	2. Reasonable	Potential immediate access to the A512 Ashby Road, and 0.7 to M1 J23.	3. Good	Good, vehicles would only need to use A512.	3. Good	No	Bus Stop: 19	3. Good	None known	3. Yes	Yes	High	Allocate
PSE69	Land South East of Syston	Low, Barkby Lane is a local road, albeit it may improve as the SUE comes forward.	1. Poor	Good, no sensitive uses in close proximity. Housing is on the other side of the railway line.	3. Good	Good, Syston town centre.	3. Good	None	3. Good	1.3 to J 607	2. Reasonable	Poor, in addition to the constriction at the railway bridge on Barkby Lane, the route to the strategic road network (A607/A46) is through residential areas and Barkby Lane in particular is unlikely to be suitable for heavy goods vehicles.	1. Poor	No	Bus Stop: 10	2. Reasonable	None known	3. No	No, because of the problem access / linkages to the strategic road network.	Low	Do not allocate

EXISTING EMPLT SITES

Market area	Safeguard		Release		Total	
	Sites	Ha	Sites	Ha	Sites	Ha
Loughborough	13	173.8	0	0	13	173.8
Shepshed	3	49.5	1	0.2	4	49.7
South of the Borough	17	80.4	4	10.6	21	91
Rural Charnwood	11	41.2	0	0	11	41.2
Total	**44**	**344.9**	**5**	**10.8**	**49**	**355.7**
LUSEP & Charnwood Campus	*2*	*40.4*			*51*	*396.1*

EXISTING ALLOCATIONS

Market area	Retain		Deallocate		Total	
	Sites	Ha	Sites	Ha	Sites	Ha
Loughborough	1	16.0	1	22.5	2	38.5
Shepshed	0	0.0	0	0.0	0	0.0
South of the Borough	3	40.0	0	0.0	3	40.0
Rural Charnwood	2	10.5	0	0.0	2	10.5
Total	**6**	**66.5**	**1**	**22.5**	**7.0**	**89.0**
LUSEP	*2*	*80.71*				*169.7*

POSSIBLE SITES

Market area	Allocate		Do not allocate		Total	
	Sites	Ha	Sites	Ha	Sites	Ha
Loughborough	0	0	1	2	1	2
Shepshed	1	25	0	0	1	25
South of the Borough	0	0	2	10	2	10
Rural Charnwood	0	0	7	27	7	27
Total	**1**	**24.9**	**10**	**39.3**	**11.0**	**64.2**
LUSEP	*1*	*64.7*				*128.9*

APPENDIX B JOB SECTOR TO LAND USE MAPPING

SECTOR TO LAND USE MAPPING

1. Economic statistics and forecasts tell us nothing directly about employment space, because they do not classify jobs according to the type of space they occupy. Rather, the statistics split jobs into economic sectors (industries and services), according to the Standard Industrial Classification (SIC). To estimate how many jobs will be based in offices and industrial space, and how many in ‘non-B’ spaces such as retail premises, schools and hospitals, we need to translate sectors into land uses.

2. As the starting point for this translation we recommend a method developed by Roger Tym & Partners (now PBA) over a series of employment land reviews and tested in a large-scale study of the Yorkshire and Humber region in 2010[1]. To our knowledge there is no other published empirical research on the relationship between activity sectors and land uses.

3. The tables below show the sectors that are classified to industrial space and offices respectively. The names and numbers that identify each activity sector are from the UK Standard Classification of Economic Activities 2007 (SIC 2007)[2].

---

[1] Roger Tym & Partners with King Sturge for Yorkshire Forward, Planning for Employment Land: Translating Jobs into Land, March 2010

[2] http://www.businessballs.com/freespecialresources/SIC-2007-explanation.pdf

Table A1 Industrial sectors

Manufacturing		
Manufacturing and repairs	10-33	All manufacturing
	95.00	Repair of computers and personal and household goods
Other industrial		
Construction	43.2	Electrical, plumbing and other construction installation activities
	43.3	Building completion and finishing
	43.9	Other specialised construction activities not elsewhere specified (nec)
Motor vehicle activities	45.2	Maintenance and repair of motor vehicles
	45.4	Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and refuse disposal	37	Sewage
	38	Waste collection, treatment and disposal activities
Employment activities (part)	78	
Warehousing		
Wholesale trade except of motor vehicles and motorcycles	46	
Freight transport by road	49.41	
Removal services	49.42	
Storage and warehousing	52.10	
Other supporting land transport activities	52.21	
Cargo handling	52.24	
Post and courier activities	53.00	
Packaging activities	82.92	
Employment activities (part)	78	

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector’s share of total employment.

Table A2 Office sectors

Office sectors		
Publishing	58	Motion picture production activities
Motion picture, video and TV programme activities	59.11	Motion picture, video and TV programme production activities
	59.12	Motion picture, video and TV programme post-production activities
	59.13	Motion picture, video and TV programme distribution activities
	59.20	Sound recording and music publishing activities
Programming and broadcasting activities	60	
Computer programming, consultancy and related activities	62	
Information service activities	63	
Financial service activities except insurance and pension funding	64	
Insurance, reinsurance and pension funding except compulsory social security	65	
Activities auxiliary to financial services and insurance activities	66	
Real estate activities	68	
Legal and accounting activities	69	
Activities of head offices, management consultancy activities	70.	
Architectural and engineering activities, technical testing and analysis	71	
Scientific research and development	72	
Advertising and market research	73	
Other professional, scientific and technical activities	74	
Renting and leasing activities	77.40	Leasing of intellectual property and similar products
Employment activities (part)	78	
Security and investigation activities	80	
Office admin, office support and other business support activities	82	
Public administration and defence; compulsory social security	84.1	Administration of the State and the economic and social policy of the community
	84.3	Compulsory social security activities

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment

.

4. On a technical note, most economic forecasts show around 20-30 broad activity sectors, a much coarser-grained classification than the SIC sectors in the table above. For example, the table counts as a B-space activity only part of the Construction industry (SIC 43.2, 43.3 and 43.9), whereas forecasts typically show only Construction as a whole (SIC 43). To estimate future employment in sub-sectors such as SIC 43.2, we assume that the share of each sub-sector's employment in its 'parent' sector stays constant.

5. There are two further technical difficulties with the relationship of sectors to land uses. The first is that the line between production space (factories and workshops) and warehousing is blurred. This is not surprising, because manufacturing and warehousing largely occupy the same kinds of buildings, many units combine both functions in proportions that vary over time, and smaller buildings are allowed to shift between the two without planning permission.

6. In setting total land provision targets, therefore, factories, workshops and warehouses, should be merged into a single 'industrial' category. This should not cause any problems, because these uses operate in similar buildings and at similar employment densities, except for very large units including strategic warehousing. In areas where they form a significant part of the stock, these large units should be allowed for separately.

7. The other problem with the tables is that some of the jobs which the table allocates to industrial space are in fact in offices. These jobs are probably in administration, sales and marketing functions of industrial and related businesses. A construction or plumbing business, for example, will often have an office that deals with orders, appointments, record-keeping and the like. In some cases this will be ancillary to an industrial unit and therefore not count as office space, but in other cases it will be free-standing. If the business is small, the office may be its only premises.

8. In total, the Yorkshire and Humber survey found that around one tenth of the jobs which our method allocates to industrial space (factories, workshops and warehouses) are in fact in offices. For a large area such as the region, this is too small a proportion to distort land provision targets. But in some local authority areas, especially the more highly urbanised, it is likely that the distortion is significant. Employment land reviews should aim to correct these distortions, using local knowledge to adjust the relationships shown in the tables above.

9. There are many other, place-specific factors why the sector-to-land-use relationships in the tables above may be invalid. For example, in some places large business units are assigned to the wrong sector or the wrong side of the local authority boundary. In other places, particular sectors are untypical and do not occupy the kinds of space that one would normally expect. In one local authority area in England, for example, there are many jobs classified to Other Supporting Land Transport Activities, SIC 52.21, which normally would occupy warehousing in the local authority area. But in

this case most of the SIC 52.21 jobs relate to railway maintenance and the people concerned work all over the country, mostly outdoors.

10. Where such anomalies arise, close inspection of the numbers, combined with local knowledge, should help correct the statistics and customise the sector-to-land-use assumptions.

11. However, it is inevitable that sector-to-land-use relationships are less reliable for small than larger areas. As the Yorkshire and Humber survey illustrated, the relationships shown in our tables work very well for whole regions. But they are not reliable for individual buildings or employment areas, and may not be reliable at local authority level. This is one of the reasons why demand forecasts are more robust for regions that individual local authority areas.

12. The Yorkshire and Humber report provides further information and advice on sector-to-land-use relationships.

Annex – Sector to land use *[see over]*

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Food, Drink & Tobacco	10110 : Processing and preserving of meat
Manufacturing	Food, Drink & Tobacco	10120 : Processing and preserving of poultry meat
Manufacturing	Food, Drink & Tobacco	10130 : Production of meat and poultry meat products
Manufacturing	Food, Drink & Tobacco	10200 : Processing and preserving of fish, crustaceans and molluscs
Manufacturing	Food, Drink & Tobacco	10310 : Processing and preserving of potatoes
Manufacturing	Food, Drink & Tobacco	10320 : Manufacture of fruit and vegetable juice
Manufacturing	Food, Drink & Tobacco	10390 : Other processing and preserving of fruit and vegetables
Manufacturing	Food, Drink & Tobacco	10410 : Manufacture of oils and fats
Manufacturing	Food, Drink & Tobacco	10420 : Manufacture of margarine and similar edible fats
Manufacturing	Food, Drink & Tobacco	10511 : Liquid milk and cream production
Manufacturing	Food, Drink & Tobacco	10512 : Butter and cheese production
Manufacturing	Food, Drink & Tobacco	10519 : Manufacture of milk products (other than liquid milk and cream,butter, cheese) nec
Manufacturing	Food, Drink & Tobacco	10520 : Manufacture of ice cream
Manufacturing	Food, Drink & Tobacco	10611 : Grain milling
Manufacturing	Food, Drink & Tobacco	10612 : Manufacture of breakfast cereals and cereals-based foods
Manufacturing	Food, Drink & Tobacco	10620 : Manufacture of starches and starch products
Manufacturing	Food, Drink & Tobacco	10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products
Manufacturing	Food, Drink & Tobacco	10810 : Manufacture of sugar
Manufacturing	Food, Drink & Tobacco	10821 : Manufacture of cocoa, and chocolate confectionery
Manufacturing	Food, Drink & Tobacco	10822 : Manufacture of sugar confectionery
Manufacturing	Food, Drink & Tobacco	10831 : Tea processing
Manufacturing	Food, Drink & Tobacco	10832 : Production of coffee and coffee substitutes
Manufacturing	Food, Drink & Tobacco	10840 : Manufacture of condiments and seasonings
Manufacturing	Food, Drink & Tobacco	10850 : Manufacture of prepared meals and dishes
Manufacturing	Food, Drink & Tobacco	10860 : Manufacture of homogenised food preparations and dietetic food
Manufacturing	Food, Drink & Tobacco	10890 : Manufacture of other food products nec
Manufacturing	Food, Drink & Tobacco	10910 : Manufacture of prepared feeds for farm animals
Manufacturing	Food, Drink & Tobacco	10920 : Manufacture of prepared pet foods
Manufacturing	Food, Drink & Tobacco	11010 : Distilling, rectifying and blending of spirits
Manufacturing	Food, Drink & Tobacco	11020 : Manufacture of wine from grape
Manufacturing	Food, Drink & Tobacco	11030 : Manufacture of cider and other fruit wines
Manufacturing	Food, Drink & Tobacco	11040 : Manufacture of other non-distilled fermented beverages
Manufacturing	Food, Drink & Tobacco	11050 : Manufacture of beer
Manufacturing	Food, Drink & Tobacco	11060 : Manufacture of malt
Manufacturing	Food, Drink & Tobacco	11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters
Manufacturing	Food, Drink & Tobacco	12000 : Manufacture of tobacco products
Manufacturing	Textiles & Clothing	13100 : Preparation and spinning of textile fibres
Manufacturing	Textiles & Clothing	13200 : Weaving of textiles
Manufacturing	Textiles & Clothing	13300 : Finishing of textiles
Manufacturing	Textiles & Clothing	13910 : Manufacture of knitted and crocheted fabrics
Manufacturing	Textiles & Clothing	13921 : Manufacture of soft furnishings
Manufacturing	Textiles & Clothing	13922 : Manufacture of canvas goods, sacks etc
Manufacturing	Textiles & Clothing	13923 : Manufacture of household textiles (other than soft furnishings of 13921)
Manufacturing	Textiles & Clothing	13931 : Manufacture of woven or tufted carpets and rugs
Manufacturing	Textiles & Clothing	13939 : Manufacture of carpets and rugs (other than woven or tufted) nec
Manufacturing	Textiles & Clothing	13940 : Manufacture of cordage, rope, twine and netting
Manufacturing	Textiles & Clothing	13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel
Manufacturing	Textiles & Clothing	13960 : Manufacture of other technical and industrial textiles
Manufacturing	Textiles & Clothing	13990 : Manufacture of other textiles nec
Manufacturing	Textiles & Clothing	14110 : Manufacture of leather clothes
Manufacturing	Textiles & Clothing	14120 : Manufacture of workwear
Manufacturing	Textiles & Clothing	14131 : Manufacture of men's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14132 : Manufacture of women's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14141 : Manufacture of men's underwear
Manufacturing	Textiles & Clothing	14142 : Manufacture of women's underwear
Manufacturing	Textiles & Clothing	14190 : Manufacture of other wearing apparel and accessories
Manufacturing	Textiles & Clothing	14200 : Manufacture of articles of fur
Manufacturing	Textiles & Clothing	14310 : Manufacture of knitted and crocheted hosiery
Manufacturing	Textiles & Clothing	14390 : Manufacture of other knitted and crocheted apparel
Manufacturing	Textiles & Clothing	15110 : Tanning and dressing of leather; dressing and dyeing of fur
Manufacturing	Textiles & Clothing	15120 : Manufacture of luggage, handbags and the like, saddlery and harness
Manufacturing	Textiles & Clothing	15200 : Manufacture of footwear
Manufacturing	Wood & Paper	16100 : Sawmilling and planing of wood
Manufacturing	Wood & Paper	16210 : Manufacture of veneer sheets and wood-based panels
Manufacturing	Wood & Paper	16220 : Manufacture of assembled parquet floors
Manufacturing	Wood & Paper	16230 : Manufacture of other builders' carpentry and joinery
Manufacturing	Wood & Paper	16240 : Manufacture of wooden containers
Manufacturing	Wood & Paper	16290 : Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
Manufacturing	Wood & Paper	17110 : Manufacture of pulp
Manufacturing	Wood & Paper	17120 : Manufacture of paper and paperboard
Manufacturing	Wood & Paper	17211 : Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper
Manufacturing	Wood & Paper	17219 : Manufacture of paper and paperboard containers other than sacks and bags
Manufacturing	Wood & Paper	17220 : Manufacture of household and sanitary goods and of toilet requisites
Manufacturing	Wood & Paper	17230 : Manufacture of paper stationery
Manufacturing	Wood & Paper	17240 : Manufacture of wallpaper
Manufacturing	Wood & Paper	17290 : Manufacture of other articles of paper and paperboard
Manufacturing	Printing and Reproduction of Recorded Media	18110 : Printing of newspapers
Manufacturing	Printing and Reproduction of Recorded Media	18121 : Manufacture of printed labels
Manufacturing	Printing and Reproduction of Recorded Media	18129 : Printing (other than printing of newspaper s and printing on labels and tags) nec
Manufacturing	Printing and Reproduction of Recorded Media	18130 : Pre-press and pre-media services
Manufacturing	Printing and Reproduction of Recorded Media	18140 : Binding and related services
Manufacturing	Printing and Reproduction of Recorded Media	18201 : Reproduction of sound recording
Manufacturing	Printing and Reproduction of Recorded Media	18202 : Reproduction of video recording
Manufacturing	Printing and Reproduction of Recorded Media	18203 : Reproduction of computer media
Manufacturing	Fuel Refining	19100 : Manufacture of coke oven products
Manufacturing	Fuel Refining	19201 : Mineral oil refining
Manufacturing	Fuel Refining	19209 : Other treatment of petroleum products (excluding mineral oil refining petrochemicals manufacture)
Manufacturing	Chemicals	20110 : Manufacture of industrial gases
Manufacturing	Chemicals	20120 : Manufacture of dyes and pigments
Manufacturing	Chemicals	20130 : Manufacture of other inorganic basic chemicals
Manufacturing	Chemicals	20140 : Manufacture of other organic basic chemicals
Manufacturing	Chemicals	20150 : Manufacture of fertilisers and nitrogen compounds
Manufacturing	Chemicals	20160 : Manufacture of plastics in primary forms
Manufacturing	Chemicals	20170 : Manufacture of synthetic rubber in primary forms
Manufacturing	Chemicals	20200 : Manufacture of pesticides and other agrochemical products
Manufacturing	Chemicals	20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants
Manufacturing	Chemicals	20302 : Manufacture of printing ink
Manufacturing	Chemicals	20411 : Manufacture of soap and detergents
Manufacturing	Chemicals	20412 : Manufacture of cleaning and polishing preparations
Manufacturing	Chemicals	20420 : Manufacture of perfumes and toilet preparations
Manufacturing	Chemicals	20510 : Manufacture of explosives
Manufacturing	Chemicals	20520 : Manufacture of glues
Manufacturing	Chemicals	20530 : Manufacture of essential oils

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Chemicals	20590 : Manufacture of other chemical products nec
Manufacturing	Chemicals	20600 : Manufacture of man-made fibres
Manufacturing	Pharmaceuticals	21100 : Manufacture of basic pharmaceutical products
Manufacturing	Pharmaceuticals	21200 : Manufacture of pharmaceutical preparations
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22110 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22190 : Manufacture of other rubber products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22210 : Manufacture of plastic plates, sheets, tubes and profiles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22220 : Manufacture of plastic packing goods
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22230 : Manufacture of builders� ware of plastic
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22290 : Manufacture of other plastic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23110 : Manufacture of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23120 : Shaping and processing of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23130 : Manufacture of hollow glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23140 : Manufacture of glass fibres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23190 : Manufacture and processing of other glass, including technical glassware
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23200 : Manufacture of refractory products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23310 : Manufacture of ceramic tiles a nd flags
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23320 : Manufacture of bricks, tiles a nd construction products, in baked clay
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23410 : Manufacture of ceramic household and ornamental articles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23420 : Manufacture of ceramic sanitary fixtures
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23430 : Manufacture of ceramic insulating fittings
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23440 : Manufacture of other technical ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23490 : Manufacture of other ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23510 : Manufacture of cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23520 : Manufacture of lime and plaster
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23610 : Manufacture of concrete products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23620 : Manufacture of plaster products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23630 : Manufacture of ready-mixed concrete
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23640 : Manufacture of mortars
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23650 : Manufacture of fibre cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23690 : Manufacture of other articles of concrete plaster and cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23700 : Cutting, shaping and finishing of stone
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23910 : Production of abrasive products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23990 : Manufacture of other non-metallic mineral products
Manufacturing	Metal products	24100 : Manufacture of basic iron and steel and of ferro-alloys
Manufacturing	Metal products	24200 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
Manufacturing	Metal products	24310 : Cold drawing of bars
Manufacturing	Metal products	24320 : Cold rolling of narrow strip
Manufacturing	Metal products	24330 : Cold forming or folding
Manufacturing	Metal products	24340 : Cold drawing of wire
Manufacturing	Metal products	24410 : Precious metals production
Manufacturing	Metal products	24420 : Aluminium production
Manufacturing	Metal products	24430 : Lead, zinc and tin production
Manufacturing	Metal products	24440 : Copper production
Manufacturing	Metal products	24450 : Other non-ferrous metal production
Manufacturing	Metal products	24460 : Processing of nuclear fuel
Manufacturing	Metal products	24510 : Casting of iron
Manufacturing	Metal products	24520 : Casting of steel
Manufacturing	Metal products	24530 : Casting of light metals
Manufacturing	Metal products	24540 : Casting of other non-ferrous metals
Manufacturing	Metal products	25110 : Manufacture of metal structures and parts of structures
Manufacturing	Metal products	25120 : Manufacture of doors and windows of metals
Manufacturing	Metal products	25210 : Manufacture of central heating radiators and boilers
Manufacturing	Metal products	25290 : Manufacture of other tanks, reservoirs and containers of metal
Manufacturing	Metal products	25300 : Manufacture of steam generators, except central heating hot water boilers
Manufacturing	Metal products	25400 : Manufacture of weapons and ammunition
Manufacturing	Metal products	25500 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
Manufacturing	Metal products	25610 : Treatment and coating of metals
Manufacturing	Metal products	25620 : Machining
Manufacturing	Metal products	25710 : Manufacture of cutlery
Manufacturing	Metal products	25720 : Manufacture of locks and hinges
Manufacturing	Metal products	25730 : Manufacture of tools
Manufacturing	Metal products	25910 : Manufacture of steel drums and similar containers
Manufacturing	Metal products	25920 : Manufacture of light metal packaging
Manufacturing	Metal products	25930 : Manufacture of wire products, chain and springs
Manufacturing	Metal products	25940 : Manufacture of fasteners and screw machine products
Manufacturing	Metal products	25990 : Manufacture of other fabricated metal products nec
Manufacturing	Computer & Electronic Products	26110 : Manufacture of electronic components
Manufacturing	Computer & Electronic Products	26120 : Manufacture of loaded electronic boards
Manufacturing	Computer & Electronic Products	26200 : Manufacture of computers and peripheral equipment
Manufacturing	Computer & Electronic Products	26301 : Manufacture of telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic Products	26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic	26400 : Manufacture of consumer electronics
Manufacturing	Computer & Electronic	26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment navigation, except industrial process control equipment
Manufacturing	Computer & Electronic	26512 : Manufacture of electronic industrial process control equipment
Manufacturing	Computer & Electronic	26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment
Manufacturing	Computer & Electronic Products	26514 : Manufacture of non-electronic industrial process control equipment
Manufacturing	Computer & Electronic Products	26520 : Manufacture of watches and clocks
Manufacturing	Computer & Electronic Products	26600 : Manufacture of irradiation, electromedical and electrottherapeutic equipment
Manufacturing	Computer & Electronic Products	26701 : Manufacture of optical precision instruments
Manufacturing	Computer & Electronic Products	26702 : Manufacture of photographic and cinematographic equipment
Manufacturing	Computer & Electronic Products	26800 : Manufacture of magnetic and optical media
Manufacturing	Computer & Electronic Products	27110 : Manufacture of electric motors, generators and transformers
Manufacturing	Computer & Electronic Products	27120 : Manufacture of electricity distribution and control apparatus
Manufacturing	Computer & Electronic Products	27200 : Manufacture of batteries and accumulators
Manufacturing	Computer & Electronic Products	27310 : Manufacture of fibre optic cables
Manufacturing	Computer & Electronic Products	27320 : Manufacture of other electronic and electric wires and cables
Manufacturing	Computer & Electronic Products	27330 : Manufacture of wiring devices
Manufacturing	Computer & Electronic Products	27400 : Manufacture of electric lighting equipment
Manufacturing	Computer & Electronic Products	27510 : Manufacture of electric domestic appliances
Manufacturing	Computer & Electronic Products	27520 : Manufacture of non-electric domestic appliances
Manufacturing	Computer & Electronic Products	27900 : Manufacture of other electrical equipment
Manufacturing	Machinery & Equipment	28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
Manufacturing	Machinery & Equipment	28120 : Manufacture of fluid power equipment
Manufacturing	Machinery & Equipment	28131 : Manufacture of pumps
Manufacturing	Machinery & Equipment	28132 : Manufacture of compressors
Manufacturing	Machinery & Equipment	28140 : Manufacture of other taps and valves
Manufacturing	Machinery & Equipment	28150 : Manufacture of bearings, gears, gearing and driving elements
Manufacturing	Machinery & Equipment	28210 : Manufacture of ovens, furnaces and furnace burners
Manufacturing	Machinery & Equipment	28220 : Manufacture of lifting and handling equipment
Manufacturing	Machinery & Equipment	28230 : Manufacture of office machinery and equipment (except computers and peripheral equipment)
Manufacturing	Machinery & Equipment	28240 : Manufacture of power-driven hand tools
Manufacturing	Machinery & Equipment	28250 : Manufacture of non-domestic cooling and ventilation equipment

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Machinery & Equipment	28290 : Manufacture of other general-purpose machinery nec
Manufacturing	Machinery & Equipment	28301 : Manufacture of agricultural tractors
Manufacturing	Machinery & Equipment	28302 : Manufacture of agricultural and forestry machinery (other than a gricultural tractors)
Manufacturing	Machinery & Equipment	28410 : Manufacture of metal forming machinery
Manufacturing	Machinery & Equipment	28490 : Manufacture of other machine tools
Manufacturing	Machinery & Equipment	28910 : Manufacture of machinery for metallurgy
Manufacturing	Machinery & Equipment	28921 : Manufacture of machinery for mining
Manufacturing	Machinery & Equipment	28922 : Manufacture of earthmoving equipment
Manufacturing	Machinery & Equipment	28923 : Manufacture of equipment for concrete crushing and screening roadworks
Manufacturing	Machinery & Equipment	28930 : Manufacture of machinery for food, beverage and tobacco processing
Manufacturing	Machinery & Equipment	28940 : Manufacture of machinery for textile, apparel and leather production
Manufacturing	Machinery & Equipment	28950 : Manufacture of machinery for paper and paperboard production
Manufacturing	Machinery & Equipment	28960 : Manufacture of plastics and rubber machinery
Manufacturing	Machinery & Equipment	28990 : Manufacture of other special-purpose machinery nec
Manufacturing	Machinery & Equipment	29100 : Manufacture of motor vehicles
Manufacturing	Machinery & Equipment	29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
Manufacturing	Machinery & Equipment	29202 : Manufacture of trailers and semi-trailers
Manufacturing	Machinery & Equipment	29203 : Manufacture of caravans
Manufacturing	Machinery & Equipment	29310 : Manufacture of electrical and electronic equipment for motor vehicles
Manufacturing	Machinery & Equipment	29320 : Manufacture of other parts and accessories for motor vehicles
Manufacturing	Machinery & Equipment	30110 : Building of ships and floating structures
Manufacturing	Machinery & Equipment	30120 : Building of pleasure and sporting boats
Manufacturing	Machinery & Equipment	30200 : Manufacture of railway locomotives and rolling stock
Manufacturing	Machinery & Equipment	30300 : Manufacture of air and spacecraft and related machinery
Manufacturing	Machinery & Equipment	30400 : Manufacture of military fighting vehicles
Manufacturing	Machinery & Equipment	30910 : Manufacture of motorcycles
Manufacturing	Machinery & Equipment	30920 : Manufacture of bicycles and invalid carriages
Manufacturing	Machinery & Equipment	30990 : Manufacture of other transport equipment nec
Manufacturing	Other Manufacturing	31010 : Manufacture of office and shop furniture
Manufacturing	Other Manufacturing	31020 : Manufacture of kitchen furniture
Manufacturing	Other Manufacturing	31030 : Manufacture of mattresses
Manufacturing	Other Manufacturing	31090 : Manufacture of other furniture
Manufacturing	Other Manufacturing	32110 : Striking of coins
Manufacturing	Other Manufacturing	32120 : Manufacture of jewellery and related articles
Manufacturing	Other Manufacturing	32130 : Manufacture of imitation jewellery and related articles
Manufacturing	Other Manufacturing	32200 : Manufacture of musical instruments
Manufacturing	Other Manufacturing	32300 : Manufacture of sports goods
Manufacturing	Other Manufacturing	32401 : Manufacture of professional and arcade games and toys
Manufacturing	Other Manufacturing	32409 : Manufacture of games and toys (other than professional and arcade games and toys)
Manufacturing	Other Manufacturing	32500 : Manufacture of medical and dental instruments and supplies
Manufacturing	Other Manufacturing	32910 : Manufacture of brooms and brushes
Manufacturing	Other Manufacturing	32990 : Other manufacturing nec
Manufacturing	Other Manufacturing	33110 : Repair of fabricated metal products
Manufacturing	Other Manufacturing	33120 : Repair of machinery
Manufacturing	Other Manufacturing	33130 : Repair of electronic and optical equipment
Manufacturing	Other Manufacturing	33140 : Repair of electrical equipment
Manufacturing	Other Manufacturing	33150 : Repair and maintenance of ships and boats
Manufacturing	Other Manufacturing	33160 : Repair and maintenance of aircraft and spacecraft
Manufacturing	Other Manufacturing	33170 : Repair and maintenance of other transport equipment
Manufacturing	Other Manufacturing	33190 : Repair of other equipment
Manufacturing	Other Manufacturing	33200 : Installation of industrial machinery and equipment
Other industrial	Utilities	37000 : Sewerage
Other industrial	Utilities	38110 : Collection of non-hazardous waste
Other industrial	Utilities	38120 : Collection of hazardous waste
Other industrial	Utilities	38210 : Treatment and disposal of non-hazardous waste
Other industrial	Utilities	38220 : Treatment and disposal of hazardous waste
Other industrial	Utilities	38310 : Dismantling of wrecks
Other industrial	Utilities	38320 : Recovery of sorted materials
Other industrial	Specialised Construction Activities	43210 : Electrical installation
Other industrial	Specialised Construction Activities	43220 : Plumbing, heat and air-conditioning installation
Other industrial	Specialised Construction Activities	43290 : Other construction installation
Other industrial	Specialised Construction Activities	43310 : Plastering
Other industrial	Specialised Construction Activities	43320 : Joinery installation
Other industrial	Specialised Construction Activities	43330 : Floor and wall covering
Other industrial	Specialised Construction Activities	43341 : Painting
Other industrial	Specialised Construction Activities	43342 : Glazing
Other industrial	Specialised Construction Activities	43390 : Other building completion and finishing
Other industrial	Specialised Construction Activities	43910 : Roofing activities
Other industrial	Specialised Construction Activities	43991 : Scaffold erection
Other industrial	Specialised Construction Activities	43999 : Specialised construction activities (other than scaffold erection)
Other industrial	Wholesale	45200 : Maintenance and repair of motor vehicles
Other industrial	Wholesale	45400 : Sale, maintenance and repair of motorcycles and related parts and accessories
Warehousing	Wholesale	46110 : Agents involved in the sale of agricultural raw materials, live animals, texti and semi-finished goods
Warehousing	Wholesale	46120 : Agentsinvolved in the sale of fuels, ores, metals and industrial chemicals
Warehousing	Wholesale	46130 : Agentsinvolved in the sale of timber and building materials
Warehousing	Wholesale	46140 : Agentsinvolved in the sale of machinery, industrial equipment, ships and aircraft
Warehousing	Wholesale	46150 : Agentsinvolved in the sale of furniture, household goods, hardware and ironmongery
Warehousing	Wholesale	46160 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
Warehousing	Wholesale	46170 : Agents involved in the sale of food, beverages and tobacco
Warehousing	Wholesale	46180 : Agents specialised in the sale of other particular products
Warehousing	Wholesale	46190 : Agents involved in the sale of a variety of goods
Warehousing	Wholesale	46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
Warehousing	Wholesale	46220 : Wholesale of flowers and plants
Warehousing	Wholesale	46230 : Wholesale of live animals
Warehousing	Wholesale	46240 : Wholesale of hides, skins and leather
Warehousing	Wholesale	46310 : Wholesale of fruit and vegetables
Warehousing	Wholesale	46320 : Wholesale of meat and meat products
Warehousing	Wholesale	46330 : Wholesale of dairy products, eggs and edible oils and fats
Warehousing	Wholesale	46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks
Warehousing	Wholesale	46342 : Wholesale of wine, beer, spirits and other alcoholic beverages
Warehousing	Wholesale	46350 : Wholesale of tobacco products
Warehousing	Wholesale	46360 : Wholesale of sugar and chocolate and sugar confectionery
Warehousing	Wholesale	46370 : Wholesale of coffee, tea, cocoa and spices
Warehousing	Wholesale	46380 : Wholesale of other food, including fish, crustaceans and molluscs
Warehousing	Wholesale	46390 : Non-specialised wholesale of food, beverages and tobacco
Warehousing	Wholesale	46410 : Wholesale of textiles
Warehousing	Wholesale	46420 : Wholesale of clothing and footwear
Warehousing	Wholesale	46431 : Wholesale of gramophone records, audio tapes, compact discs and video tapes and of the equipment on which these are played)
Warehousing	Wholesale	46439 : Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes,compact discs and video tapes and the equipment on which these are played)
Warehousing	Wholesale	46440 : Wholesale of china and glassware and cleaning materials
Warehousing	Wholesale	46450 : Wholesale of perfume and cosmetics
Warehousing	Wholesale	46460 : Wholesale of pharmaceutical goods
Warehousing	Wholesale	46470 : Wholesale of furniture, carpets and lighting equipment
Warehousing	Wholesale	46480 : Wholesale of watches and jewellery
Warehousing	Wholesale	46491 : Wholesale of musical instruments

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Warehousing	Wholesale	46499 : Wholesale of household goods (other than musical instruments) nec
Warehousing	Wholesale	46510 : Wholesale of computers, computer peripheral equipment and software
Warehousing	Wholesale	46520 : Wholesale of electronic and telecommunications equipment and parts
Warehousing	Wholesale	46610 : Wholesale of agricultural machinery, equipment and supplies
Warehousing	Wholesale	46620 : Wholesale of machine tools
Warehousing	Wholesale	46630 : Wholesale of mining, construction and civil engineering machinery
Warehousing	Wholesale	46640 : Wholesale of machinery for the textile industry and of sewing and knitting machines
Warehousing	Wholesale	46650 : Wholesale of office furniture
Warehousing	Wholesale	46660 : Wholesale of other office machinery and equipment
Warehousing	Wholesale	46690 : Wholesale of other machinery and equipment
Warehousing	Wholesale	46711 : Wholes ale of petroleum and petroleum products
Warehousing	Wholesale	46719 : Wholes ale of fuels and related products (other than petroleum and petroleum products)
Warehousing	Wholesale	46720 : Wholesale of metals and metal ores
Warehousing	Wholesale	46730 : Wholesale of wood, construction materials and sanitary equipment
Warehousing	Wholesale	46740 : Wholesale of hardware, plumbing and heating equipment and supplies
Warehousing	Wholesale	46750 : Wholesale of chemical products
Warehousing	Wholesale	46760 : Wholesale of other intermediate products
Warehousing	Wholesale	46770 : Wholesale of waste and scrap
Warehousing	Wholesale	46900 : Non-specialised wholesale trade
Warehousing	Land Transport, Storage & Post	49410 : Freight transport by road
Warehousing	Land Transport, Storage & Post	49420 : Removal services
Warehousing	Land Transport, Storage & Post	52101 : Operation of warehousing and storage facilities for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52102 : Operation of warehousing and storage facilities for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52103 : Operation of warehousing and storage facilities for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	52211 : Operation of rail freight terminals
Warehousing	Land Transport, Storage & Post	52212 : Operation of rail passenger facilities at railway stations
Warehousing	Land Transport, Storage & Post	52213 : Operation of bus and coach passenger facilities at bus and coach stations
Warehousing	Land Transport, Storage & Post	52219 : Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway ies at railway stations or passenger facilities at bus and coachstations or passenger facilities at railway stations or passenger facilities at bus and coach stations)
Warehousing	Land Transport, Storage & Post	52241 : Cargo handling for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52242 : Cargo handling for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52243 : Cargo handling for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	53100 : Postal activities under universal service obligation
Warehousing	Land Transport, Storage & Post	53201 : Licensed Carriers
Warehousing	Land Transport, Storage & Post	53202 : Unlicensed Carriers
Office	Media Activities	58110 : Book publishing
Office	Media Activities	58120 : Publishing of directories and mailing lists
Office	Media Activities	58130 : Publishing of newspapers
Office	Media Activities	58141 : Publishing of learned journals
Office	Media Activities	58142 : Publishing of consumer, business and professional journals and periodicals
Office	Media Activities	58190 : Other publishing activities
Office	Media Activities	59111 : Motion picture production activities
Office	Media Activities	59112 : Video production activities
Office	Media Activities	59113 : Television programme production activities
Office	Media Activities	59120 : Motion picture, video and television programme post-production activities
Office	Media Activities	59131 : Motion picture distribution activities
Office	Media Activities	59132 : Video distribution activities
Office	Media Activities	59133 : Television programme distribution activities
Office	Media Activities	59200 : Sound recording and music publishing activities
Office	Media Activities	60100 : Radio broadcasting
Office	Media Activities	60200 : Television programming and broadcasting activities
Office	Computing & Information Services	62011 : Ready-made interactive leisure and entertainment software development
Office	Computing & Information Services	62012 : Business and domestic software development
Office	Computing & Information Services	62020 : Computer consultancy activities
Office	Computing & Information Services	62030 : Computer facilities management activities
Office	Computing & Information Services	62090 : Other information technology and computer service activities
Office	Computing & Information Services	63110 : Data processing, hosting and related activities
Office	Computing & Information Services	63120 : Web portals
Office	Computing & Information Services	63910 : News agency activities
Office	Computing & Information Services	63990 : Other information service activities nec
Office	Finance	64110 : Central banking
Office	Finance	64191 : Banks
Office	Finance	64192 : Building societies
Office	Finance	64201 : Activities of agricultural holding companies
Office	Finance	64202 : Activities of production holding companies
Office	Finance	64203 : Activities of construction holding companies
Office	Finance	64204 : Activities of distribution holding companies
Office	Finance	64205 : Activities of financial services holding companies
Office	Finance	64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c
Office	Finance	64301 : Activities of investment trusts
Office	Finance	64302 : Activities of unit trusts
Office	Finance	64303 : Activities of venture and development capital companies
Office	Finance	64304 : Activities of open-ended investment companies
Office	Finance	64305 : Activities of property unit trusts
Office	Finance	64306 : Activities of real estate investment trusts
Office	Finance	64910 : Financial leasing
Office	Finance	64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
Office	Finance	64922 : Activities of mortgage finance companies
Office	Finance	64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.
Office	Finance	64991 : Security dealing on own account
Office	Finance	64992 : Factoring
Office	Finance	64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
Office	Insurance & Pensions	65110 : Life insurance
Office	Insurance & Pensions	65120 : Non-life insurance
Office	Insurance & Pensions	65201 : Life reinsurance
Office	Insurance & Pensions	65202 : Non-life reinsurance
Office	Insurance & Pensions	65300 : Pension funding
Office	Finance	66110 : Administration of financial markets
Office	Finance	66120 : Security and commodity contracts brokerage
Office	Finance	66190 : Other activities auxiliary to financial services, except insurance and pension funding
Office	Finance	66210 : Risk and damage evaluation
Office	Finance	66220 : Activities ofinsurance agents and brokers
Office	Finance	66290 : Other activities auxiliary to insurance and pension funding
Office	Finance	66300 : Fund management activities
Office	Real Estate	68100 : Buying and selling of own real estate
Office	Real Estate	68201 : Renting and operating of Housing Association real estate
Office	Real Estate	68202 : Letting and operating of conference and exhibition centres
Office	Real Estate	68209 : Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.
Office	Real Estate	68310 : Real estate agencies

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Office	Real Estate	68320 : Management of real estate on a fee or contract basis
Office	Professional services	69101 : Barristers at law
Office	Professional services	69102 : Solicitors
Office	Professional services	69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec
Office	Professional services	69201 : Accounting, and auditing activities
Office	Professional services	69202 : Bookkeeping activities
Office	Professional services	69203 : Tax consultancy
Office	Professional services	70100 : Activities of head offices
Office	Professional services	70210 : Public relations and communication activities
Office	Professional services	70221 : Financial management
Office	Professional services	70229 : Management consultancy activities (other than financial management)
Office	Professional services	71111 : Architectural activities
Office	Professional services	71112 : Urban planning and landscape architectural activities
Office	Professional services	71121 : Engineering design activities for industrial process and production
Office	Professional services	71122 : Engineering related scientific and technical consulting activities
Office	Professional services	71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
Office	Professional services	71200 : Technical testing and analysis
Office	Professional services	72110 : Research and experimental development on biotechnology
Office	Professional services	72190 : Other research and experimental development on natural sciences and engineering
Office	Professional services	72200 : Research and experimental development on social sciences and humanities
Office	Professional services	73110 : Advertising agencies
Office	Professional services	73120 : Media representation
Office	Professional services	73200 : Market research and public opinion polling
Office	Professional services	74300 : Translation and interpretation activities
Office	Professional services	74901 : Environmental consulting activities
Office	Professional services	74902 : Quantity surveying activities
Office	Professional services	74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)
Office	Administrative & Supportive Service Activities	77400 : Leasing of intellectual property and similar products, except copyrighted works
Office	Administrative & Supportive Service Activities	78101 : Motion picture, television and other theatrical casting
Office	Administrative & Supportive Service Activities	78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec
Office	Administrative & Supportive Service Activities	78200 : Temporary employment agency activities
Office	Administrative & Supportive Service Activities	78300 : Other human resources provision
Office	Administrative & Supportive Service Activities	80100 : Private security activities
Office	Administrative & Supportive Service Activities	80200 : Security systems service activities
Office	Administrative & Supportive Service Activities	80300 : Investigation activities
Office	Administrative & Supportive Service Activities	82110 : Combined office administrative service activities
Office	Administrative & Supportive Service Activities	82190 : Photocopying, document preparation and other specialised office support activities
Office	Administrative & Supportive Service Activities	82200 : Activities of call centres
Office	Administrative & Supportive Service Activities	82301 : Activities of exhibition and fair organizers
Office	Administrative & Supportive Service Activities	82302 : Activities of conference organizers
Office	Administrative & Supportive Service Activities	82911 : Activities of collection agencies
Office	Administrative & Supportive Service Activities	82912 : Activities of credit bureaus
Warehousing	Administrative & Supportive Service Activities	82920 : Packaging activities
Office	Administrative & Supportive Service Activities	82990 : Other business support service activities nec
Office	Public Administration & Defence	84110 : General public administration activities
Office	Public Administration & Defence	84120 : Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
Office	Public Administration & Defence	84130 : Regulation of and contribution to more efficient operation of businesses
Office	Public Administration & Defence	84210 : Foreign affairs
Office	Public Administration & Defence	84300 : Compulsory social security activities
Office	Other Private Services	94110 : Activities of business and employers membership organisations
Office	Other Private Services	94120 : Activities of professional membership organisations
Office	Other Private Services	94200 : Activities of trade unions
Office	Other Private Services	94910 : Activities of religious organisations
Office	Other Private Services	94920 : Activities of political organisations
Office	Other Private Services	94990 : Activities of other membership organisations nec
Other industrial	Other Private Services	95110 : Repair of computers and peripheral equipment
Other industrial	Other Private Services	95120 : Repair of communication equipment
Other industrial	Other Private Services	95210 : Repair of consumer electronics
Other industrial	Other Private Services	95220 : Repair of household appliances and home and garden equipment
Other industrial	Other Private Services	95230 : Repair of footwear and leather goods
Other industrial	Other Private Services	95240 : Repair of furniture and home furnishings
Other industrial	Other Private Services	95250 : Repair of watches, clocks and jewellery
Other industrial	Other Private Services	95290 : Repair of other personal and household goods