Rochford District Council

October 2008

Local Development Framework Evidence Base

Employment Land Study

LDF Evidence Base

Rochford District Council

Rochford District Council

INVESTOR IN PEOPLE

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Rochford District Council

Employment Land Study

Final Report

September 2008

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EXECUTIVE SUMMARY

Rochford District Council commissioned GVA Grimley Ltd to undertake an Employment Land Study as supporting evidence for the emerging Core Strategy of the Local Development Framework (LDF). The Study focuses, in accordance with the EEDA guidance on employment land reviews, on 'B-use-class' employment land.

The policy context within Rochford provides an agenda for economic growth in the District resulting in a significant increase in employment numbers over the planning period to 2021.

Rochford currently has a balanced economy with particular locational strength in the agriculture sector and construction. There is evidence that the economy is lower value with low workplace earnings, and less knowledge intensive employment than the county and the region. However, Rochford is typified by high levels of commuting to London and therefore has high earning and high skilled residents, indicating that the District has the potential to develop by retaining some of these workers in local employment.

Reflecting the nature of employment in the District, commercial property in Rochford is characterised by a much stronger industrial than office market. There are a number of significant industrial units let within the District with major employers such as MFI located there. Its links to the A127 in Rayleigh make it a desirable location for industrial employers and is a strength which can be developed in future years.

The West of the District's proximity to the A127 also represents a good strategic office location within which office development could be placed to meet future need.

The quality of the current employment land supply in Rochford is mixed. Employment sites in the East of the District tend to have poor strategic access while those in town centres and the Western parts of the District have much better strategic access, and achieve a higher "fitness for purpose" rating.

Balancing employment demand and supply for our base case and two scenarios (low growth and medium growth at Southend Airport) results in the following employment land requirements for Rochford District until 2021

Requirements for B Class Space Compared with Supply in Rochford 2006 – 2021

Base Case	Demand m^2	Supply m^2	Balance m^2	Balance ha
Office	18,161	0	-18,161	-2.27
Industrial	15,356	15,760	404	0.10
Total	33,517	15,760	-17,757	-2.17
Scenario A				
Office	18,248	783	-17378	-2.2
Industrial	15,901	16,685	1329	0.3
Total	34,149	17,468	-16049	-1.8
Scenario B				
Office	20,603	3,340	-17,263	-2.2
Industrial	21,042	19,707	-1,335	-0.3
Total	41,645	23,047	-18,599	-2.5

Source: GVA Grimley

Under all the Scenarios (including the Base Case) there is an additional net demand for employment land for office of just over 2 ha and a more or less sufficient land supply for industrial uses.

KEY RECOMMENDATIONS

Given the need for additional employment land in the District we recommend that Rochford District Council adopts strong policies to protect existing employment land.

On a strategic level we recommend that land to the West of the District is considered as viable to be developed as employment land. It is strategically best placed to house such uses due to its relatively good connectivity to Southend and London.

The Eastern parts of the District, on the other hand, are not strategically good locations for employment land. We therefore recommend that Rochford District Council consider the East as a more appropriate location for housing and other uses when planning for future land use requirements.

OFFICE

SAFEGUARD CURRENT OFFICE STOCK

The major office location within Rochford, at Locks Hill in the centre of Rochford itself, is not allocated as an employment site. Given the increasing future requirements for office stock set out in our base case and two scenarios we recommend that Rochford District Council should allocate the land at

Locks Hill as employment land to emphasise the importance of the site for employment use. This will help to safeguard future office supply in the town centre.

DEVELOP LAND WEST OF RAYLEIGH

In order to satisfy the additional office demand in the District we recommend that Rochford District Council consider developing a portion of land west of Rayleigh, parts of which are currently allocated as green belt, for employment use. This should principally be a mix of high quality office and industrial space. Any allocations should ensure that the majority of the green belt land and quality of environment remains protected in this area.

PROMOTE TOWN CENTRE OFFICE USE IN RAYLEIGH

There is no designated employment land in Rayleigh town centre. Given its comparatively strong strategic location we recommend that Rochford District Council investigate the possibility of allocating employment land within Rayleigh town centre for office use, in the form of a mixed use scheme.

SITES

Brook Road: Although current stock quality is poor there is potential for redevelopment and an office element to be included within this.

Rawreth Industrial Estate: This is similar to Brook Road with poor quality stock but the adjoining green belt provides an opportunity to develop high quality office stock which is strategically located providing the majority of the green belt is protected.

INDUSTRIAL

Rochford is currently a stronger industrial location than office location. However, net additional demand for industrial land is very limited over the planning period.

Additional demand is met in large part by the Stambridge Mill employment site which provides 7,200m^2 of employment floorspace which is around 50% of total requirements.

RECOMMENDATION FOR EXISTING SITES

Starlane Industrial Estate: Given the quality of existing stock is very poor and its strategic location is also poor we would recommend that Rochford District Council consider reallocating this site for other uses.

Baltic Wharf: This site adequately serves its current purpose in providing employment in port related activities. We therefore recommend that the Council safeguard the existing employment land at this site. However, it is our view that this site is not suitable for development for employment uses other than those related to the existing activities. This is due to its poor strategic location and its poor site access. We recommend that if the Council do consider development for other employment uses at this site then major infrastructure improvements should be implemented to ensure it is a viable employment location.

Hockley Trading Centre: In our view, Hockley Trading Centre is a strategically well placed employment location. However, we recognise the ambitions of the Hockley Town Centre masterplan and that within this the Council should consider it to be allocated for other uses. However, we recommend that this reallocation happen only if provision is made within the masterplan for office use within Hockley Town Centre as part of a mixed use scheme.

Ashington Road Industrial Estate: In our view this is a fit for purpose industrial estate and we recommend that Rochford District Council keep this site in its current use.

Riverside Industrial Estate: Given the quality of existing stock is very poor we recommend that Rochford District Council considers measures to improve the quality of the estate. We also recommend Rochford District Council consider that it may be a suitable location to include more office stock within it to meet future requirements. Its central location make it a strategically good site for office use.

Stambridge Mill: This is currently poor quality. We recommend that Rochford District Council consider safeguarding this site for light industrial use. We also recommend that the possibility of businesses from Starlane Industrial Estate relocating to Standbridge Mill are investigated.

Purdeys Industrial Estate: This is a fit for purpose industrial estate which should be maintained and, if possible, expanded.

Rawreth Industrial Estate: We acknowledge that this site has particular environmental issues and has been identified, through the Urban Capacity Study, as a site that may be suitable for housing use. We recommend that the Council consider allowing a reallocation of this site to housing provided that the requisite industrial employment land is provided elsewhere, preferably on a portion of the green belt land West of Rayleigh. This would be while ensuring that the majority of the green belt land and quality of environment remains protected.

Imperial Park Industrial Estate: In our view this is a fit for purpose industrial estate and we recommend that Rochford District Council protects this site in its current use.

Brook Road Industrial Estate: Due to its current poor quality stock we recommend that Rochford District Council considers measures to improve the quality of the estate and consider including high quality office accommodation to ensure it success as a high quality office/industrial location which is strategically well connected.

POTENTIAL SITES

Land West of Rayleigh: In order to meet future employment land requirements we recommend Rochford District Council consider allocating a portion of land west of Rayleigh, currently designated as green belt, for a employment use which would address the need for office accommodation and the demand resulting from possible de-allocation of other industrial sites. This should ensure that the majority of the green belt land and quality of environment remains protected in this area.

1. INTRODUCTION

BACKGROUND

1.1 Rochford is an affluent District with high earnings and low unemployment levels. Employment growth is slow, however, compared to the East of England. There is also a large amount of out commuting to nearby Basildon, Chelmsford, Southend and Central London.

1.2 Its proximity to the Thames Gateway and Central London means that sustainable economic growth is achievable for the District. The location and strong demand for local labour indicates that the conditions are in place for growth.

1.3 The development of London Southend Airport will provide opportunities for employment creation in the aviation sector and other sectors in future years. Rochford has a high proportion of employment in the manufacturing sector and seems to have a locational advantage for this sector. However, the manufacturing employment in the area is relatively low value. This means that there is a need to develop the economy to attract and retain higher value sectors. Both of these issues will have an impact on employment levels and employment land needs in the District and will be a key consideration of this study.

1.4 The continuing relationship with London and the Thames Gateway will endure and will develop in the coming years. The economic growth from these areas will give Rochford opportunities to develop its economy, meaning that employment land will also have to develop to meet the changing needs.

1.5 Rochford District Council is working in partnership with Southend Borough Council to produce a Joint Area Action Plan (JAAP) covering London Southend Airport and the surrounding area. It is anticipated that this area will have the potential to provide future employment opportunities. It is recognised, however, that there is likely to be a need for additional research into employment elsewhere in the Rochford District.

1.6 Rochford District Council has therefore commissioned GVA Grimley Ltd to undertake an Employment Land Study as supporting evidence for the emerging Core Strategy of the Local Development Framework (LDF).

THE BRIEF

1.7 The required Employment Land Study is in line with EEDA's Employment Land Review Guidance Manual, and provides:

- An assessment of current and future demand for different types of employment land.
- An assessment of current supply of existing employment land including analysis of the quality of existing employment land allocated in the Rochford District Replacement Local Plan 2006.
- An assessment of the appropriateness of sites being put forward through the Local Development Framework for use as employment land. This should include analysis of the feasibility of new industrial estates, particularly in the West of the district.

METHODOLOGY

1.8 The Employment Land Study focuses, in accordance with the EEDA guidance on employment land reviews, on 'B-use-class' employment land, i.e. B1, B2 and B8. Throughout the report we have assumed the following definitions: Office (B1a and B1b), Other Business Space (B1c and B2), and Warehouses (B8). Final employment land requirements are then produced for office (B1a and B1b) and Other Business Space and Warehousing are combined to give employment land requirements for industrial (B1c/B2/B8) uses.

1.9 The methods applied included desk based research, consultation with key stakeholders, and a field survey to assess the key employment sites.

1.10 The supply analysis covers all allocated employment sites in Rochford District. A general survey of all potential areas of employment land development was also carried out, with a particular focus on developable land West of Rayleigh. Business areas included in the study range from large industrial and business estates to smaller town centre business areas. The assessment approach adopted follows the relevant national guidance[1].

1.11 Within the field survey sites were assessed against an agreed scoring system to determine their 'fitness for purpose'. The factors assessed included:

- Age/quality of buildings
- Vacant land/buildings on site
- Access to amenities/facilities
- Strategic access
- Adequacy of servicing

1.12 The main research for this study was undertaken in Spring/Summer 2008. The property market assessment therefore is set in the uncertain market conditions prevailing in 2008.

[1] Office of the Deputy Prime Minister (Dec 2004) *Employment Land Reviews: Guidance Note*
East of England Development Agency (Mar 2008) *Employment Land Reviews: Guidance Manual*

1.13 The current property market downturn has a noticeable effect on the short term demand for employment land, with a reduction in investment and therefore demand for employment land. However, within the timeframe of this study – which is up to 2021 – we expect the overall demand for employment land not to vary significantly. There might be a shift in demand in the short term but with overall demand not being reduced significantly.

STRUCTURE OF THE REPORT

1.14 The reminder of this document is structured as follows:

- Chapter 2 provides the policy context
- Chapter 3 gives an overview of the local socio-economic conditions.
- Chapter 4 provides a commercial property market analysis
- Chapter 5 identifies the future employment land demand
- Chapter 6 assesses the current employment land supply
- Chapter 7 analyses the balance between employment land supply and demand and gives policy recommendations

2. POLICY REVIEW

INTRODUCTION

2.1 This section provides an overview of the policies relevant to employment and employment land in Rochford, together with key strategies which may impact upon its economy. The major national, regional and local policies are reviewed and provide the context within which the employment land study is set.

NATIONAL

2.2 The **Sustainable Communities Plan (ODPM, 2003)** establishes the creation of sustainable communities as a key overarching Government objective. It set out key requirements of a sustainable community, including a flourishing local economy to provide jobs and wealth, and promotes a step change in housing supply through designation of four growth areas in the South East including the Thames Gateway, which parts of Rochford are included in.

2.3 **Planning Policy Statement 1 (PPS1, ODPM 2005)** sets out the Government's overarching objective for the planning system to deliver sustainable development. It promotes a positive planning framework to achieve sustainable economic growth in an integrated manner in which environmental, economic and social objectives are achieved. It sets out that the planning system should ensure suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure development and should actively promote and facilitate good quality and sustainable development. Planning should provide for improved productivity, choice and competition and recognise that technological and other requirements of modern businesses are changing rapidly. It should be recognised that economic development can deliver environmental and social benefits, but that in some cases wider sub-regional, regional or national economic benefits may outweigh adverse local impacts.

2.4 **Planning Policy Guidance Note 4 (PPG4, ODPM 1992)** sets out national land-use policies for industrial and commercial development and small firms. It requires planning authorities to ensure there is sufficient land available and capable of development for employment and well-served by infrastructure. There should also be a variety of sites available to meet a range of needs and facilitate competition whilst also recognising the locational demands of businesses. Planning authorities should promote sustainable development in which economic growth and a high quality environment are pursued together.

2.5 In locational terms, planning authorities should seek to minimise the length and number of trips (in terms of movement of both goods and workforce), road congestion and promote sustainable transport modes. The guidance promotes employment development which can be served by rail freight and indicates that distribution facilities should be located away from urban areas to minimise congestion. Mixed use development is promoted where there is no adverse impact on residential amenity. In rural areas, employment development to sustain the rural economy should be weighed against the need to protect the countryside.

2.6 PPG4 has to be considered in the context set by **Planning Policy Statement 3 on Housing** which promotes the effective use of land and requires Local Planning Authorities to consider whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development. This obliges Local Authorities to balance both housing and employment needs. An over-provision of employment land in planning might result in the actual loss of favourable employment land as a result of the unwelcome applications for planning permission for housing on employment.

2.7 **Draft Planning Policy Statement 4: Planning for Sustainable Economic Development** goes some way to addressing the conflict between employment land and housing allocation. A Consultation Paper was issued by the Government in December 2007 and will supersede PPG4 when published in its final form.

2.8 The draft document outlines how positive planning fulfils an important role in facilitating growth though coordinating housing and employment growth, coordinating infrastructure and delivering other local strategic priorities. It emphasises that the planning system must enable communities to take full advantage of the economic opportunities available to them, sustaining and creating employment and prosperity.

2.9 The draft document ensures that economic development is fully considered through the planning process as opposed to in isolation under PPG4. This means that a more flexible approach to land allocation is sought which considers economic trends, locational needs of businesses and looks at mixed use developments in appropriate locations, as opposed to allocating land solely for employment purposes. It also provides guidance to local authorities to ensure that there is an adequate supply of land for employment development.

2.10 Development within town centres is guided by **PPS6 Planning for Town Centres** which seeks to focus development in existing centres in order to support the Government's objective of promoting vital and viable town centres. The main town centre uses to which this policy statement applies are retail, leisure and recreation uses, offices, and arts, culture and tourism. Of key significance is the sequential approach to development which now includes office uses.

2.11 **PPS7 Sustainable Development in Rural Areas** sets to achieve sustainable economic growth and diversification in rural areas whilst at the same time preventing urban sprawl. To encourage sustainable growth, development is to be focused in, or next to, existing towns and villages. It is aimed at delivering thriving, inclusive and sustainable rural communities.

REGIONAL

THE EAST OF ENGLAND PLAN

2.12 The **Regional Spatial Strategy for the East of England** (RSS) (May 2008) seeks to achieve sustainable development and build sustainable communities, directing most strategically significant growth to the region's major urban areas to maximise use of the existing public transport network and existing physical and social infrastructure; and to maximise re-use of previously developed land (set against a regional target for 60% of development to be on PDL).

2.13 The East of England's vision is that by 2021

> *'the region realises its economic potential and provides a high quality of life for its people, including by meeting their housing needs in sustainable inclusive communities. At the same time it will reduce its impact on climate change and the environment, including through savings in energy and water use and by strengthening its stock of environmental assets.*

2.14 The plan's five key objectives are listed below:

- To reduce the region's impact on, and exposure to, the effects of climate change
- To address housing shortages in the region
- To realise the economic potential of the region and its people
- To improve the quality of life for the people of the region.
- To improve and conserve the region's environment

2.15 The plan splits down into four sub-regions and ten key centres for development and change. The four sub-regions are:

- Cambridge Sub-Region
- Essex Thames Gateway
- Haven Gateway
- London Arc

2.16 Parts of Rochford, specifically London Southend Airport, are within the Essex Thames Gateway sub region providing a strong context for economic growth. The objectives for the sub region are to:

- substantially increase the numbers of jobs and homes in line with Policies E1 and H1 to bring about a better alignment of homes and workplaces while continuing to recognise and make the most of the area's complementary role in relation to London, especially the emerging development/transport nodes in East London at Stratford and elsewhere;
- give the area a more positive and attractive image building on its strengths and assets, promoting excellence in the design of buildings and public realm and creating townscapes and landscapes of high quality and distinctiveness;
- significantly increase the overall value of the sub-regional economy and the economic conditions, living standards, aspirations, and quality of life of its residents;
- enhance the education and skills base and improve access to higher education; and
- protect and enhance the quality of the natural and historic environments, including retaining and making more positive appropriate use of the green belt.

2.17 For the sub-region **Policy ETG5** sets the job targets for Rochford between 2001 and 2021 at 3,000 additional jobs.

2.18 As well as its general objectives the East of England Plan sets out a series of employment land/economic objectives for the region and Rochford.

2.19 **Policy E2** stresses that an adequate range of employment sites should be provided. Efficient use will be made of existing employment land resources and new sites for industry and commerce will be provided in: urban areas, key market towns, locations to minimise commuting and maximise sustainable transport and minimise damage to environmental and social capital and locations which meet the needs of the region's significant clusters.

2.20 **Policy E8** asserts that simplified planning zones will be allowed where proposals assist areas for regeneration by means of an accelerated rate of inward investment and support regionally and sub-regionally important clusters and sector while protecting the local environment, heritage and cultural interests from adverse development impacts.

2.21 **Policy E13** explains that Airports are drivers of the regional and local economy and contribute to meeting regeneration needs. It states that airport growth should be supported to the maximum capacity of the existing runways in the case of Luton and Stansted and modest expansion to meet local market demand in the case of Norwich and Southend. Further support for growth at the regional airport is subject plans achieving a balance between economic, employment and other benefits of growth and environmental and other considerations.

EAST OF ENGLAND REGIONAL ECONOMIC STRATEGY

2.22 A Shared Vision, the **Regional Economic Strategy for the East of England**, is structured around the ambition to deliver

> *"a leading economy, founded on our world-class knowledge base and the creativity of [the region's] people, in order to improve the quality of life for all who live and work [in the region]."*

2.23 The Strategy identifies four key themes: building on strengths; improving areas of average or poor performance; capitalising on distinctive opportunities and challenges (in particular proximity to London as a world city); and embedding underlying principles of sustainable development.

2.24 Priorities are defined around eight strategic goals which aim to deliver the sustainable economic development of the region. The main goals of the strategy are as follows:

- A skills base that can support a world-class economy
- Growing competitiveness, productivity and entrepreneurship
- Global leadership in developing and realising innovation in science, technology and research
- High quality places to live, work and visit
- Social inclusion and broad participation in the regional economy
- Making the most from the development of international gateways and national and regional transport corridors
- A leading information society
- An exemplar for the efficient use of resources

2.25 It is within this context that Rochford's economic development is set with an emphasis on the global economy and taking advantage of its close links to London. This provides a strong context for growth in a high skilled, attractive environment and importantly for Rochford promotes employment use in town centres and in strategically connected locations.

LOCAL

ROCHFORD LOCAL PLAN

2.26 The Rochford District Replacement Local Plan sets out the planning policies for the District. It demonstrates Rochford District Council's approach towards economic regeneration and employment land. The District recognises the importance of the allocation of employment land to achieve the District's regeneration aspirations. **Policy CS5 – Encouraging Economic Regeneration** states that it is the Council's aim to:

- Work with partners to consolidate the local economy and attract new investment; and
- Allocate land for industrial and commercial uses, whilst striving to maintain and enhance the vitality and viability of the town and village centres as attractive places to visit and shop

2.27 The Plan also sets out Rochford District Council's approach to employment land with six specific policies designed towards developing employment land in the District. These Objectives are outlined below:

EB1 *– On existing or allocated employment sites B1, B2 & B8 uses are permitted provided that:*

The impact of development on the characteristics of the Metropolitan Green Belt and other designated sites

- *The ecological value of the site and adjoining land*
- *The availability of land or buildings available for employment*
- *The implications of on and off-site traffic generation*
- *The balance of non industrial uses*
- *Evidence of demand for the particular type of development proposed*
- *The suitability of the area for the proposed use more generally; and*
- *Any other benefits offered by the scheme*

EB2 *– To use the sequential test from PPS6 and when applying consider how the development will improve its surroundings, the appearance of buildings, screening, any harmful impacts on neighbouring uses, site access, layout and the protection and enhancement of nature conservation interests.*

***EB3** – Where existing employment development inhibits the development of land for an allocated purpose, or has a serious adverse effect on residential or rural amenities, the Council will consider using its powers, including compulsory purchase powers, to secure its relocation or extinguishment.*

***EB4** – Proposals to allow home working will be permitted as long as the following are met:*

- *The use remains linked to the residential use and does not become separate commercial unit*
- *No adverse effect on residential amenity*
- *No detrimental effect upon the visual character of the surrounding residential area*
- *Will not create on street parking/highway problem*

***EB5** – A design statement must accompany proposals for all major employment development (over 1000 m^2 of floorspace of 1ha of land)*

2.28 These policies set a positive environment for employment land allocation in Rochford, particularly in the sectors that are expected to bring employment growth. It demonstrates that the economic development aspirations of the District are in line with the employment land policies.

2.29 The document also sets out specific policies for three employment locations within the District, namely Baltic Wharf, Essex Marina and Stambridge Mills. At Baltic Wharf and Essex Marina employment development is permitted unless there is a contravention of PPG2 on environmental grounds. At Stambridge Mills employment development is restricted to B1 use class, given its prominent waterfront location; as this is the most appropriate use.

ROCHFORD ECONOMIC DEVELOPMENT STRATEGY

2.30 Rochford's Economic Development Strategy sets the economic direction of the District's economy over the next 5 years. It places Rochford within the context of the Regional Economic Strategy and states that its key aim is to:

"Work with partners to maximise and encourage economic growth for the benefit of the community in the area, making the District the best place in the County to live, work and visit"

2.31 While it does not specify sectors or types of skills that the District requires it commits to developing an understanding of the economy's needs. Its specific objectives are to:

- Raise the profile of Rochford – by participating in county, sub-regional and regional initiatives
- Support the needs of the business community in the area
- Develop the skills of the workforce – match employer needs with local skills
- Develop tourism and heritage
- Seek to improve town centre vitality and support town centre and industrial estate enhancements
- Support sustainable use of resources

SUMMARY

2.32 The policy context within Rochford shows that the agenda for economic growth is prevalent within the District. At a national and regional level the impetus is on developing the economy via smart growth. The local development documents set out a framework for development within the District and recognise the need for the economy to grow. At a District level, employment sites are allocated and therefore protected. However, there is land currently used for employment in Rochford town centre which is not allocated employment land.

3. SOCIO-ECONOMIC PROFILE

CONTEXT

3.1 The UK economy, which has been stable and experienced strong growth over recent years, is set for a slowdown. Recent survey data and official statistics show that economic growth is slowing fast. The 2008 Q1 economic growth figure has been revised down to 0.3%, or an annual equivalent of 1.1%, well below the trend growth rate of about 2.7%pa. The latest survey evidence points to a further weakening in Q2, with annual equivalent economic growth of about 0.8%.

3.2 The sector experiencing the greatest slowdown is Finance & Business Services with growth weaker in Q1 (1.0% annualised) than in the manufacturing sector, where growth is holding up reasonably well (1.2% annualised). The retail sector, according to official statistics, is also holding up surprisingly well, with sales volumes in the three months to May showing strong and accelerating growth of 5.5% year-on-year and 7.4% annualised.

3.3 Economic growth forecasts are being revised downwards month by month. The Chartered Institute of Purchasing and Supply (CIPS) survey suggest contraction in the manufacturing and service sectors is likely, although so far the figures are not as weak as in 2003 or 2001. Employment growth is holding up well, even though unemployment is edging upwards, but the latest consensus forecasts are for marginally negative employment growth in 2009 compared to healthy positive growth in 2007 and early 2008 and very weak, but positive, growth in 2010.

3.4 House prices are falling at an accelerating pace and that is likely to continue well into 2009, with a likely overall fall in prices of 20% from peak to trough. This will impact on the retail sector and hence the overall economy. UK economic growth, according to the latest consensus forecasts, will be just 1.6% in 2008 and 1.3% in 2009, before improving to close to trend growth in 2011 and 2012. However, recent inflation and market interest rate increases suggest an even steeper downturn in 2009, with 1% or lower growth looking increasingly likely.

ROCHFORD ECONOMIC OVERVIEW

3.5 Rochford has a balanced economy with the majority of employment spread between manufacturing, distribution, business services and public services. It has particular locational strength in the agriculture sector and construction.

3.6 There is evidence that the economy is lower value with low workplace earnings, and less knowledge intensive employment than the county and the region. Start-up rates are also comparatively lower than Essex and the East of England.

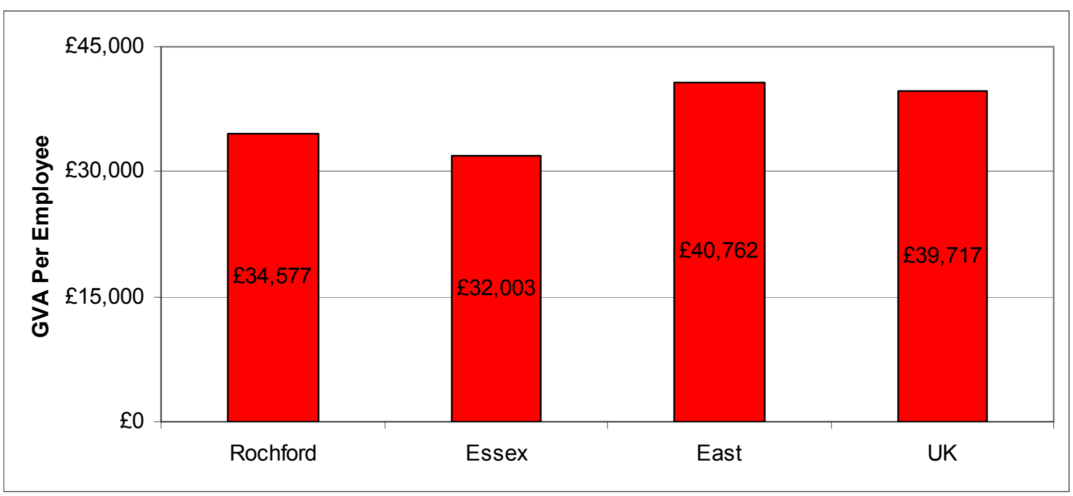
3.7 However, Rochford is typified by high levels of commuting to London and therefore has high earning and high skilled residents, indicating that the District has the potential to develop by retaining some of these workers in the local employment.

OUTPUT AND PRODUCTIVITY

3.8 Rochford's economy produced an output, measured by Gross Value Added (GVA), in 2006 of £852 million, an increase of 44.9% since 1992. To put this in context GVA in Essex is £24,467 million and has experienced an increase of 64.3% since 1992. In the East of England Region GVA in 2006 was £93.5 billion an increase of 55.5% since 1992[2].

3.9 GVA per employee, a measure of the productivity of an economy, shows that Rochford and Essex have similar levels, although Rochford's figure (£34,577) is notably lower than the regional figure of £40,762. This is shown in Figure 1.

Figure 1 - Productivity in Rochford 2006



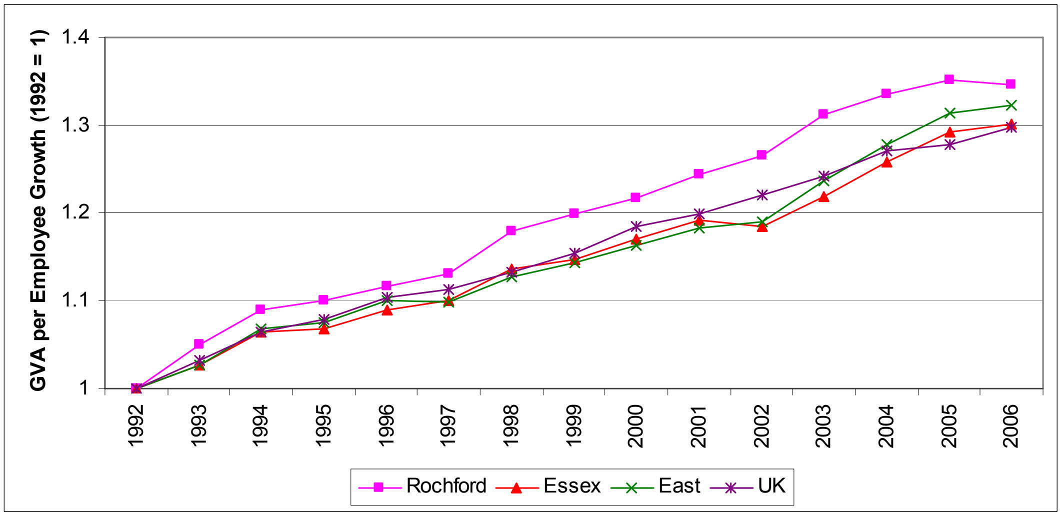
Source: Experian Business Services/GVA Grimley 2006

3.10 These figures highlight the strength of the East of England economy and its growing influence within the wider UK economy, given that GVA per employee has grown faster than its national equivalent. It also demonstrates that Rochford, within a regional context, has a comparatively healthy economy but is still falling behind the Region and the UK.

[2] GVA data provided by Experian Business Services

3.11 The gap in productivity between Rochford and the County and Region has narrowed over the economic cycle, with Rochford experiencing a higher increase in productivity between 1992 and 2006 (35%) than in the County (30%) and the Region (32%) as shown in Figure 2.

Figure 2 – Changes to Productivity between 1992 and 2007



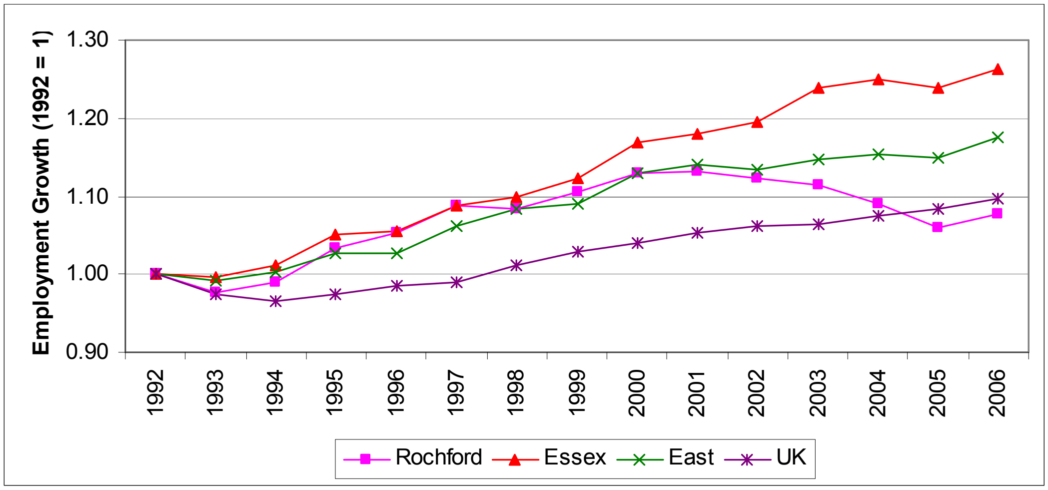
Source: Experian/GVA Grimley 2006

EMPLOYEES

3.12 Estimated employee numbers in Rochford currently stand at 24,641, compared to 764,523 in Essex and 2,292,583 in the East of England[3]. Employment growth in Rochford was in line with the County and the Region between 1992 and 1999. After that time employment growth rates in Rochford, Essex and the Region started to diverge. Employment in Rochford began to decline, while growth in Essex, the East and the UK remained steady. Between 2005 and 2006 employment levels in Rochford increased again resulting in an overall increase of 7.5% between 1992 and 2006 (see Figure 3).

[3] Experian Business Services

Figure 3 – Employment Growth 1992 - 2006



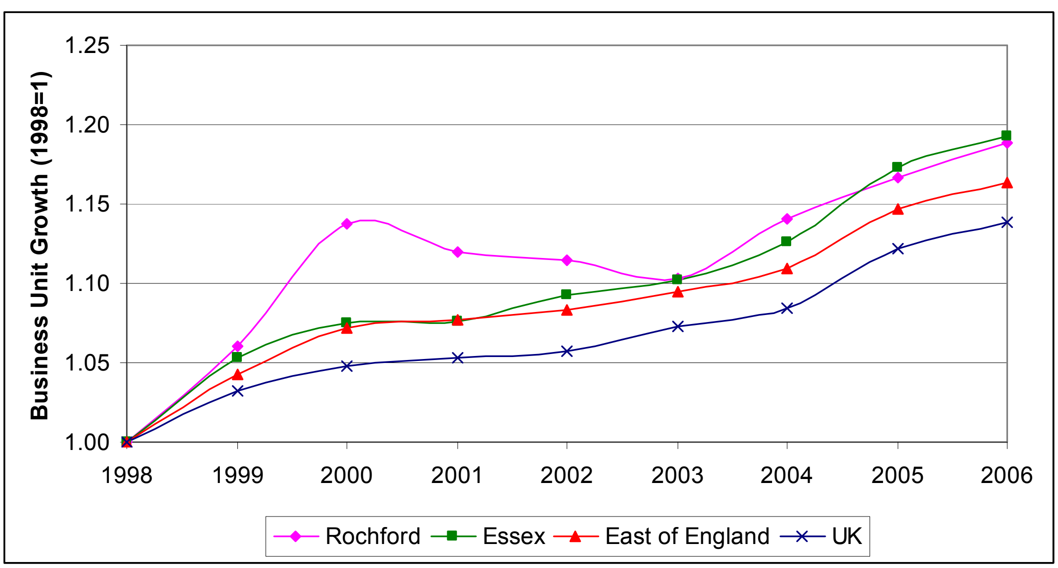
Source: Experian Business Services/GVA Grimley 2006

BUSINESSES

BUSINESS GROWTH

3.13 The number of businesses in Rochford has increased by 19% between 1998 and 2006. This is the same as Essex (19%) and higher than the East of England Region (16%) and the UK (14%) as shown in Figure 4.

Figure 4 – Business Growth 1998 – 2006

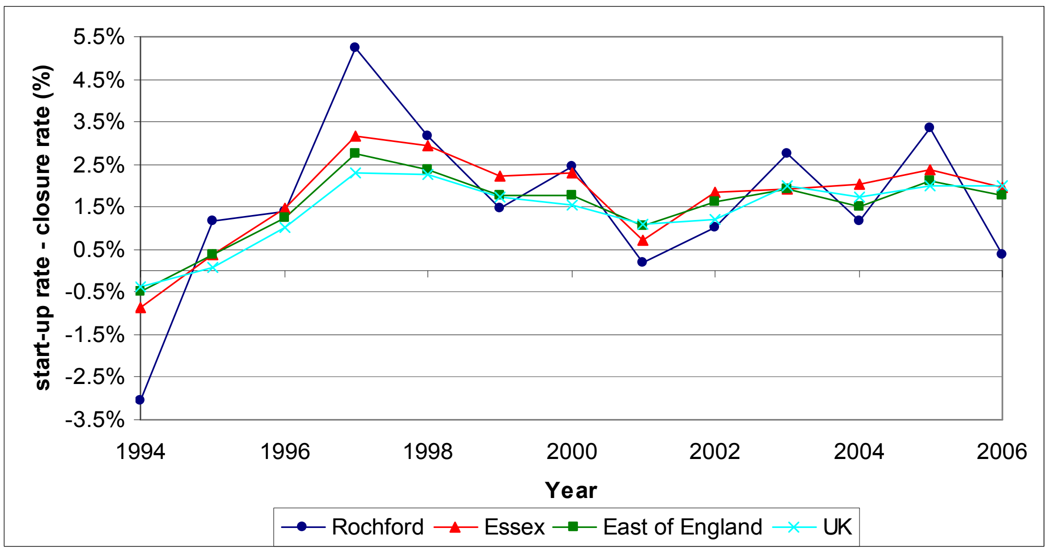


Source: ABI/GVA Grimley

VAT REGISTRATION

3.14 Business start-up rates[4] in Rochford fluctuated considerably between 1994 and 2006, latest figures show that the Districts start-up rates are 0.4% in 2006, compared to 2% in Essex and 1.8% in the East of England. However in 2005, Rochford's figures were higher than those in Essex and the East of England respectively indicating inconsistent levels of business creation. On average, Rochford's level of creation has been above regional levels and below the figures for Essex with a net start up rate of 1.59% between 1994 and 2006 in Rochford, compared to 1.73% and 1.53% respectively. This is shown in Figure 5.

Figure 5 – Annual Net Business Start-up Rate 1994 – 2006



Source: ABI/GVA Grimley (2006)

SECTORS

3.15 The Finance and Other Business Service (FBS) sector is the largest sector in Rochford in employment and output terms (see Figure 6). However, when looking at the location quotient, which compares the relative size of a sector with other geographical areas, the size of the FBS sector is relatively small compared to the average in the county, the region and the UK as Table 1 demonstrates.

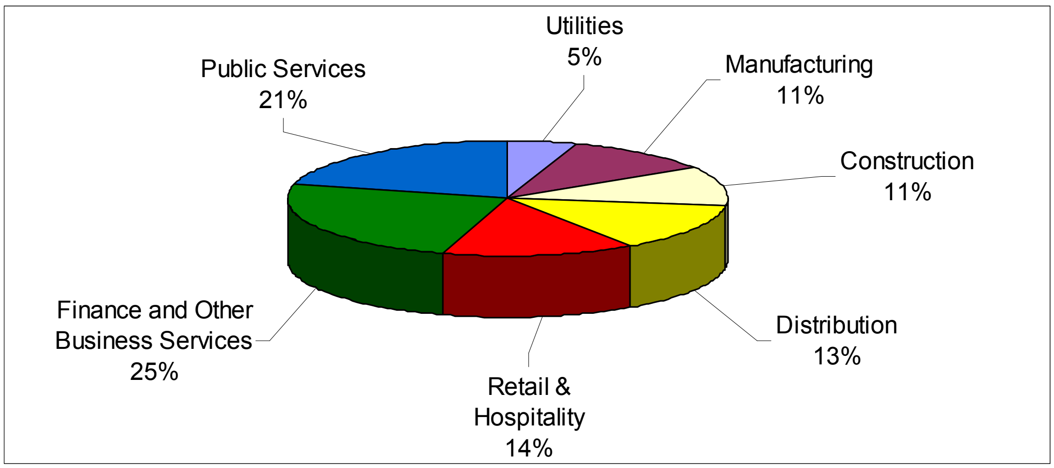
3.16 Public Services are the second biggest sector in Rochford by employment, but are only fourth largest in output terms. In relative terms there are fewer people employed in Public Services than in the UK as a whole and output is also slightly below the UK average as shown in Table 1.

[4] Business start-up rates are defined as net VAT registrations (registrations minus de-registrations) as a percentage of the total number of existing VAT registered businesses.

3.17 Retail & Hospitality (14%), Distribution (13%), Construction (11%) and Manufacturing (11%) all have similar levels of employment in Rochford. In relative terms (employment and output) the Construction sector is overrepresented in Rochford. The relative size of employment and output of the Retail & Hospitality, Distribution and Manufacturing sectors are roughly in line with the national average as shown in Table 1.

3.18 The three sectors Agriculture, Mining and Utilities, which are presented in an aggregated form in Figure 6 and Table 1 account for 5% of all employment in the District and for 8% of total output. While this is not very high in relative terms, employment is over 3.5 times higher than the UK average and output is over 2.5 times. Further analysis of the data reveals that of the three sectors Agriculture & Forestry is responsible for the high location quotient of this sector grouping. This indicates the relative strength of rural employment within Rochford District.

Figure 6 – Employment by Sector (2006)



Source: Experian Business Services / GVA Grimley

Table 1 – Sectors by Employment, Output and Location Quotient

Sector	Employment		Output	
	Number	Location Quotient (UK)[5]	Number (£ mn)	Location Quotient (UK)
Agriculture, Mining & Utilities	1,209	3.62	57	2.65
Manufacturing	2,762	1.01	118	1.06
Construction	2,732	2.31	72	1.54
Distribution	3,268	1.08	128	1.17
Retail & Hospitality	3,499	0.81	67	0.97
Finance & Other Business Services	5,994	0.94	179	0.76
Public Services	5,178	0.78	110	0.79
Total	**24,642**		**731**	

Source: Experian Business Services / GVA Grimley

KNOWLEDGE BASED SECTORS

3.19 As well as the number of employees it is also important to assess the type of employment held by employees. The amount of high value or "knowledge intensive" employment gives an indication of an economy's strength. Data for Rochford is compiled by looking at the numbers of employees in "high value" sectors as defined by the OECD. This includes sectors such as research and development and the manufacture of pharmaceuticals.

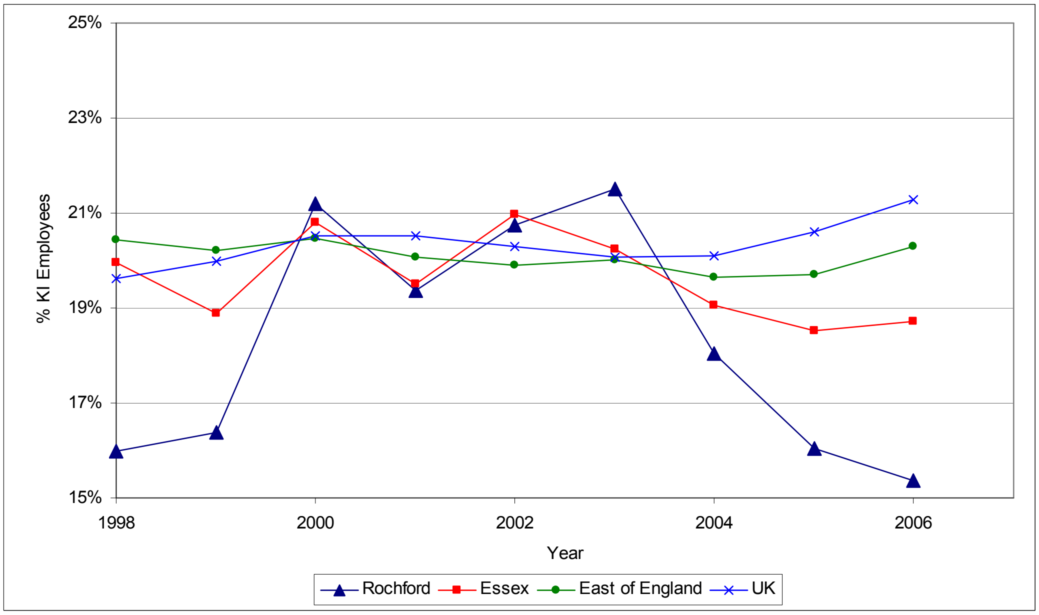
3.20 Employment in knowledge-based sectors is a good measure of economic competitiveness and is a determinant of current and future prosperity. The thinking behind this view is summarised in a quote from the Government White Paper *Our Competitive Future: Building the Knowledge Economy*:

> *In a knowledge-driven economy […] the generation and exploitation of knowledge has come to play the predominant part in the creation of wealth. Companies in countries with higher labour costs, such as the UK, therefore have to innovate and adapt continuously to retain their competitive edge.*

3.21 Figure 7 indicates that the proportion of knowledge based employment in Rochford increased significantly between 1998 and 2000. It then stayed relatively stable before starting to decline again in 2003. The proportion of knowledge based employment in Rochford is now roughly back at the 1998 level, which is below the average in Essex, the East of England and the UK.

[5] The location quotient compares the relative size of a sector in an area with the relative size of the same sector in another area. A location quotient of 1 indicates that the relative size of the sector is the same. A location quotient larger than 1 indicates that employment in the sector is overrepresented in the area. A location quotient smaller than 1 indicates that employment in the sector is underrepresented.

Figure 7 – Proportion of Employees in "Knowledge-based" Sectors (1998 – 2006)



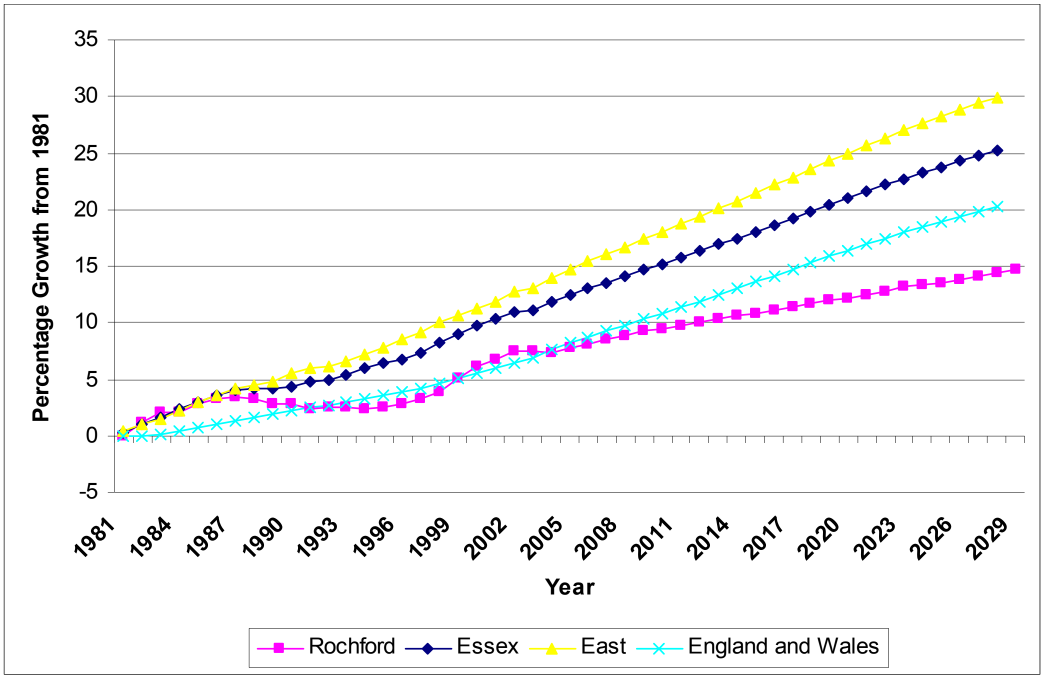
Source: ABI/GVA Grimley

LABOUR MARKET

POPULATION

3.22 Since the early 1990s Rochford has grown to a population just under 80,000 and is expected to grow by another 5,000 over the next 20 years; however this level of growth is far below that expected in the rest of Essex and the East of England region. Population Trends and projections are shown in Figure 8.

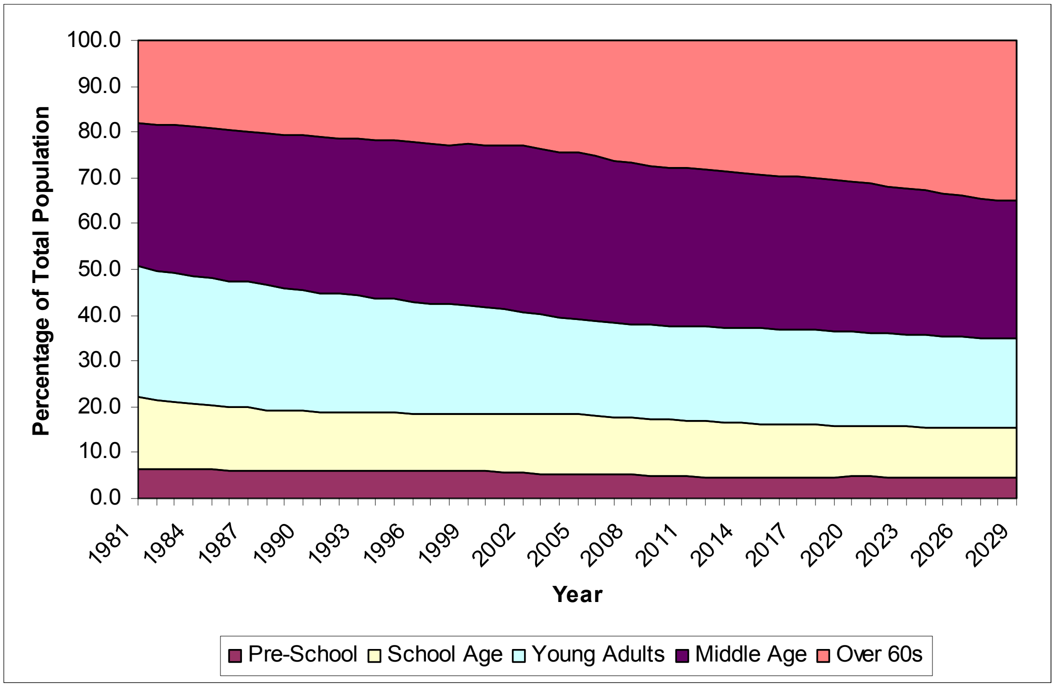
Figure 8 – Population Trends and Projections 1981-2029



Source: ONS 2004 Based Population Projections

3.23 Rochford District has an elderly population with around 25% of the population aged over 60, compared to 23% in Essex and 22% in the East of England. As a percentage of the total population the over 60s cohort is expected to grow to 35% by 2029. Over the same period the Pre-School (0-4) and School Age (5-15) cohorts are expected to decrease as a percentage of the total population from 18.1% to 15.5%, this is a further fall from the equivalent figure in 1981 which exceeded 20%. This is shown in Figure 9.

Figure 9 – Distribution of Population by Age Cohorts in Rochford



Source: ONS 2004 Based Population Projections

EMPLOYMENT RATES

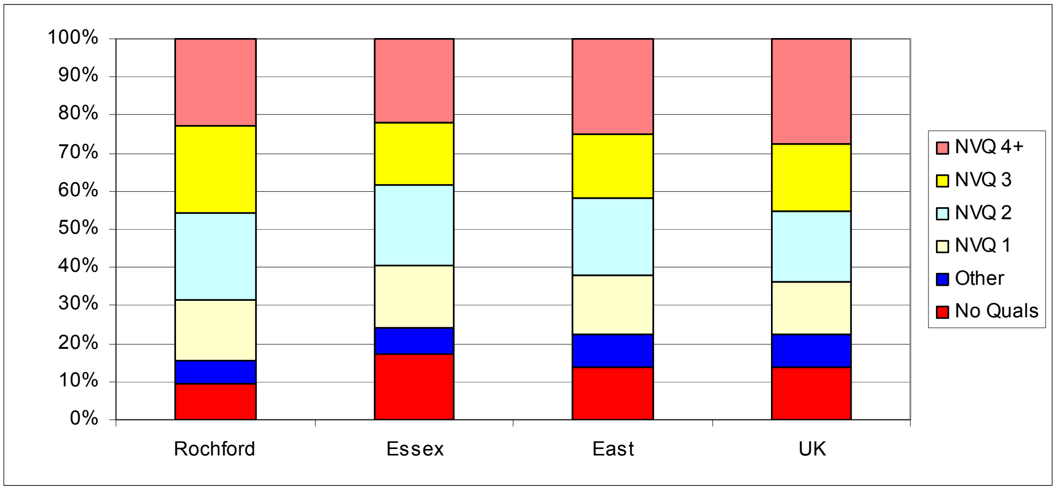
3.24 Employment rates in Rochford at 81.1% are similar in comparison to 80.3% in Essex and 80.7% in the East of England and slightly higher in comparison to the figure of 78.4% in the UK[6].

SKILLS AND OCCUPATION LEVELS

3.25 Rochford has a higher proportion of residents with high qualifications levels (NVQ 3+) compared to the County and the Region and a similar proportion as the UK as shown in Figure 10. The District also has a lower proportion of residents with low skills levels (other or no qualifications) compared to the County, the Region and the UK. However, the high skills levels in the District only partially translate into high level jobs. The proportion of managers / senior officials and professional occupations is roughly in line with the average in the county, the region and the UK. The relatively small proportion of residents with poor skills levels is reflected in the low proportion of low occupational levels as shown in Figure 11.

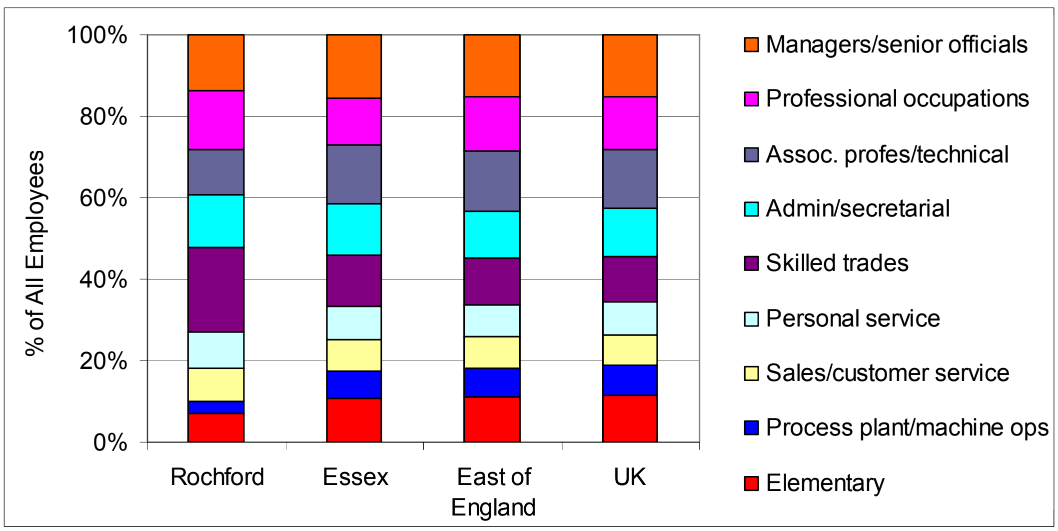
[6] Annual Population Survey

Figure 10 – Qualifications Levels 2006



Source – Annual Population Survey 2006

Figure 11 – Occupational Levels 2006



Source: Annual Population Survey

EARNINGS

3.26 On average Rochford residents enjoy higher rates of pay (£28,725) than the Essex average (£26,901) and the average across the East of England Region (£25,446). However the average pay of those who work in Rochford, sits well below this figure at just £24,009, behind the Essex average of £24,613 as shown in Figure 12.

Figure 12 – Median Annual Gross Pay for Full-Time Employees

Source: Annual Survey of Hours and Earnings 2007

3.27 The disparity in pay is characteristic of an area where out-commuting to higher value employment elsewhere is large scale (in Rochford's case London and Southend). It may also indicate a shortage of higher paid employment within the District itself. However, in the past the disparity between residents and workplace earnings has been much higher (see Figure 13) and a indicating some success in attracting higher value employment into the area.

Figure 13 – Difference between Residents and Workplace Annual Salary 2002-2007

Source: Annual Survey of Hours and Earnings 2007

COMMUTING PATTERNS

3.28 Of Rochford's residents 60% of the working travel outside Rochford to find work with the most popular destinations being neighbouring Southend and elsewhere in Essex. Rochford also has high patterns of commuting to London, with 'The City' the most likely destination a reflection of the established transport links to Liverpool Street Station. The major commuting patterns in and out of Rochford are shown in Table 2

Table 2– Travel to Work Patterns 2001

Area	To Rochford		From Rochford	
	#	%	#	%
Rochford	13,598	50	13,598	36
Southend	4,337	16	8,623	23
Elsewhere in Essex	4,120	15	7,892	21
London	352	1	6,731	18
Others	4,834	18	9,470	25
Total	**27,241**	**100**	**37,691**	**100**

Source: ONS Travel to Work Data 2001

3.29 In terms of those who work in the District almost half also live in Rochford. A large numbers travelling to work to Rochford from elsewhere in Essex (8,457) half of which are from Southend-on-Sea District.

3.30 It has to be noted that the most recent travel to work data available is from the 2001 Census. Since then there have been significant changes to the working environment, with the pull of the City and Canary Wharf likely to have increased.

RURAL ECONOMY

3.31 Up-to-date data on the rural economy can be difficult to capture. Population and workforce related data relates to the 2001 Census which, while giving an accurate snapshot of the rural dynamics at that time, does not capture changes over the subsequent years. For employment and sector related data the 2006 ABI ward level data can be used. However, ABI data is based on a sample survey and can be somewhat inaccurate on a ward level and therefore has to be treated with caution. Using this data allows us to make an assessment of the differences between the urban and rural economies within Rochford District, as we do not envisage large scale changes to have taken place.

3.32 The traditional definition of rural economies is also changing. The view that rural economies equate to agriculture and specifically farming is no longer wholly valid. The restructuring of the agriculture industry and growth of rural businesses related to tourism, leisure, and cultural and creative industries means that the rural economy has to be considered in a new context. This means that the role of the rural economy now takes on a different role and is important to consider the implications this has for the District's economic future.

3.33 Our first focus is defining the 'rural economy' in Rochford. DEFRA (Department for Environment, Food and Rural Affairs) have developed a Rural Definition methodology in order to classify wards as "urban" or "rural".

3.34 Under this classification, wards are classified by two measurement criteria – morphology / settlement form and context / sparsity.

3.35 To determine morphology / settlement form each hectare grid square is associated with a particular settlement type, which are categorised as follows:

- Urban (over 10,000 population)
- Rural town
- Village
- Dispersed (hamlets and isolated dwellings)

3.36 To determine context / sparsity each hectare grid square is given a sparsity score based on the number of households in surrounding hectare squares up to a distance of 30 km, and are categorised as follows:

- Sparse
- Less sparse

3.37 This gives an eight tier Urban/Rural Classification:

1. Urban (Sparse)
2. Urban (Less Sparse)
3. Town (Less Sparse)
4. Town (Sparse)
5. Village (Less Sparse)
6. Village (Sparse)
7. Dispersed (Less Sparse)
8. Dispersed (Sparse)

3.38 In the context of this list, wards classified 1 to 5 are defined as 'urban' and those 6 to 8 are 'rural'. Applying this to Rochford means that all wards within the District fall into one of the following three tiers:

4: Town

5: Village (Less Sparse)

6: Village (Sparse)

3.39 For the purpose of this assessment we therefore categorise Rochford's wards as shown in Table 3.

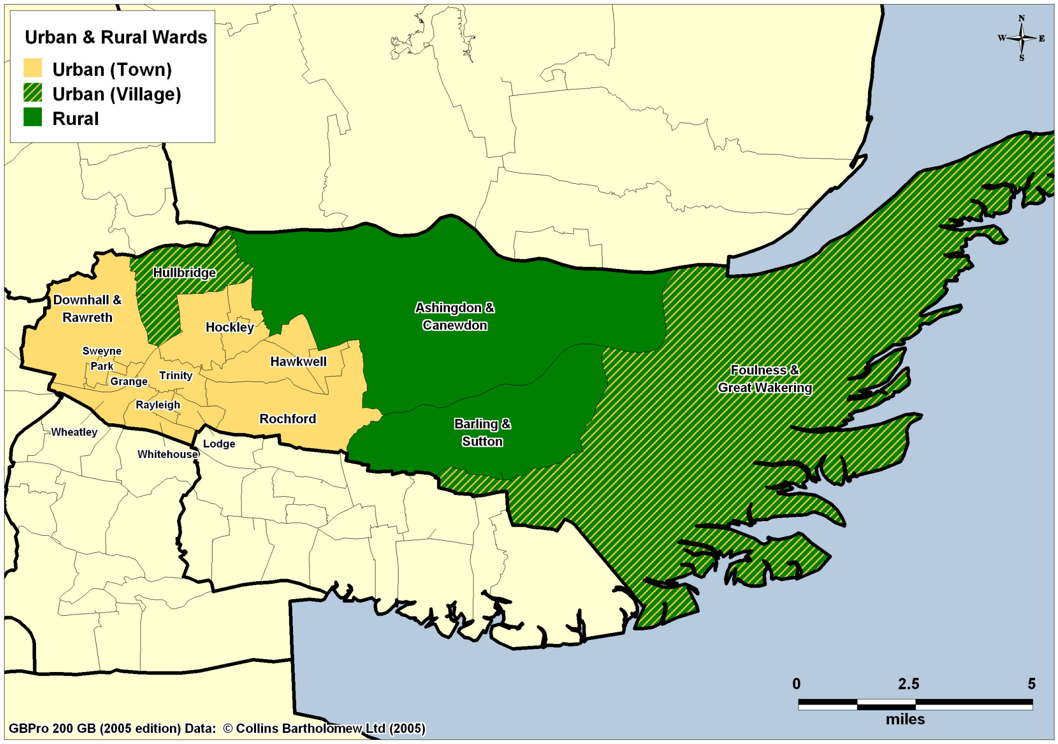
Table 3 – Ward Classification in Rochford

Urban (Town)		
• Downhall and Rawreth	• Hawkwell South	• Hawkwell West
• Hawkwell North	• Hockley North	• Hockley West
• Hockley Central	• Rayleigh Central	• Rochford
• Lodge	• Trinity	• Wheatley
• Sweyne Park	• Grange	
• Whitehouse		
Urban (Village)		
• Foulness and Great Wakering	• Hullbridge	
Rural		
• Ashingdon and Canewdon	• Barling and Sutton	

Source: DEFRA (2004)

3.40 Classifying the wards as in Table 3 above allows us to make a distinction between those areas of Rochford that are specifically rural with the towns and villages of urban Rochford. These areas all have different characteristics and, in order to understand the dynamics of the rural economy in Rochford, it is important to analyse these areas individually. To give an idea of the spatial dimension of these urban and rural wards, the classification of Rochford's wards is shown in Figure 14.

Figure 14 – Rural and Urban Rochford

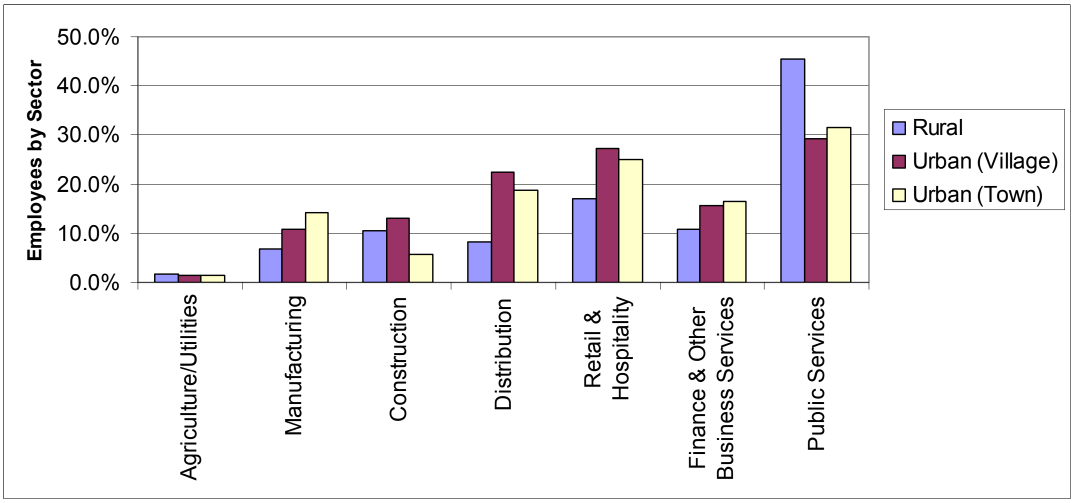


Source: DEFRA/GVA Grimley 2007

SECTORS

3.41 Rural Rochford is dominated by the public sector with 45% of employees in Public Services compared to 29% in the urban villages and 31% in the urban towns. It also has a smaller Distribution sector, employing 8% in rural Rochford compared to 22% in the urban vilages and 19% in urban Rochford. Significantly, the high value financial sector employs less in rural Rochford with 11% of employees, compared to 16% in the urban fringe and 17% in urban Rochford. This is shown in Figure 15.

Figure 15 - Employee Split by Sector in Urban and Rural Rochford

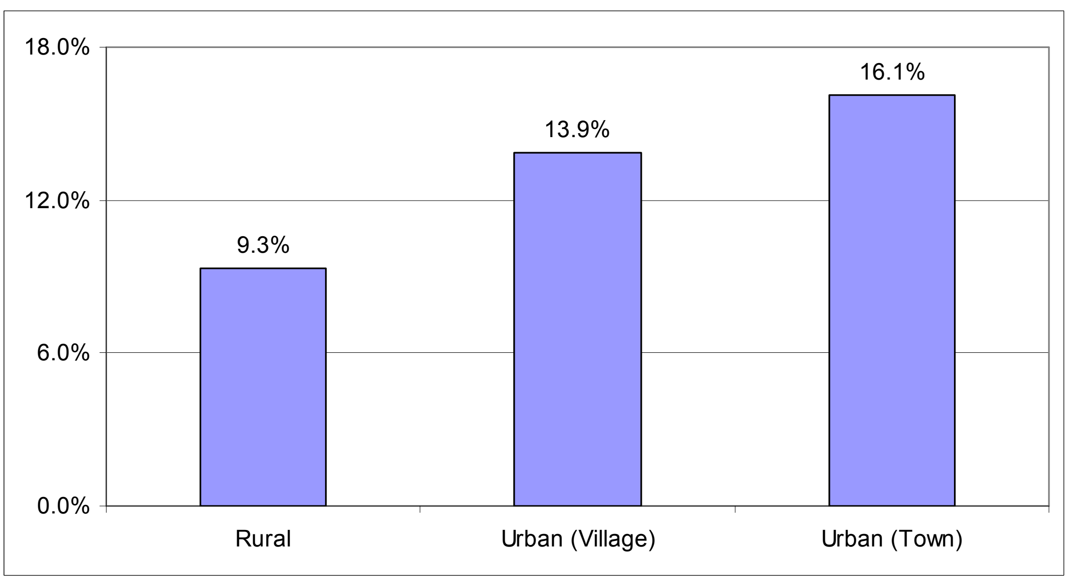


Source:ABI 2006

KNOWLEDGE INTENSIVE EMPLOYMENT

3.42 We again use the measure of "knowledge intensive" employment to give an indication of the value of the economy in urban and rural Rochford. Perhaps unsurprisingly the levels of knowledge intensive employment in rural wards is significantly lower than in the urban wards, suggesting a gap exists between urban and rural Rochford in quality of employment. This is shown in Figure 16.

Figure 16 – Percentage of employees in "knowledge intensive" employment in rural/urban Rochford



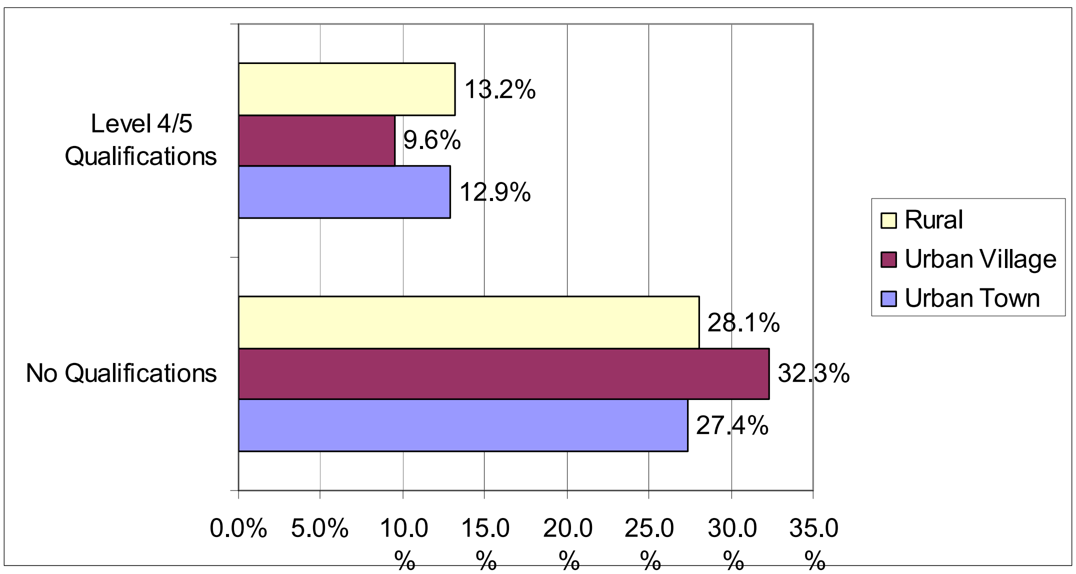
Source:ABI 2006

SKILL LEVELS

3.43 Ward level information on occupation and skills is only available from the Census in 2001, but does give an indication of the role of rural Rochford compared to urban Rochford. Data shows that the rural wards have a higher proportion of skilled residents in comparison to urban wards. As shown in Figure 17, 13.2% of the rural population have Level 4/5 Qualifications which is higher than both urban towns of Rochford and significantly higher than the urban villages of Rochford.

3.44 Similarly, rural Rochford has less people with no qualifications than the urban villages, indicating that it is perhaps these urban towns that contain lower skilled population.

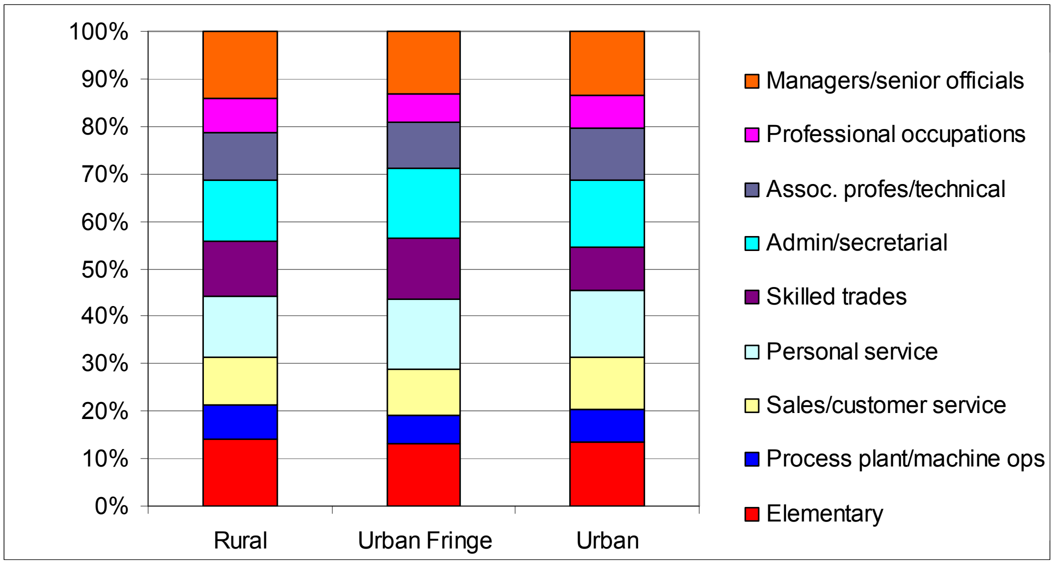
Figure 17 - Qualification Levels in Rural/Urban Rochford 2001



Source: Census 2001

3.45 An analysis of occupation levels shows that the rural wards have more residents employed as managers/senior officials than the urban fringe and urban areas of Rochford. This is perhaps a result of the desirability of rural areas to high earning individuals, where traditionally high quality accommodation is present. Apart from managers/senior officials, the occupational profile is broadly similar not indicating any major differences in occupation between the selected areas. This is shown Figure 18:

Figure 18 – Occupation Levels in Rural/Urban Rochford 2001



Source: Census 2001

SUMMARY

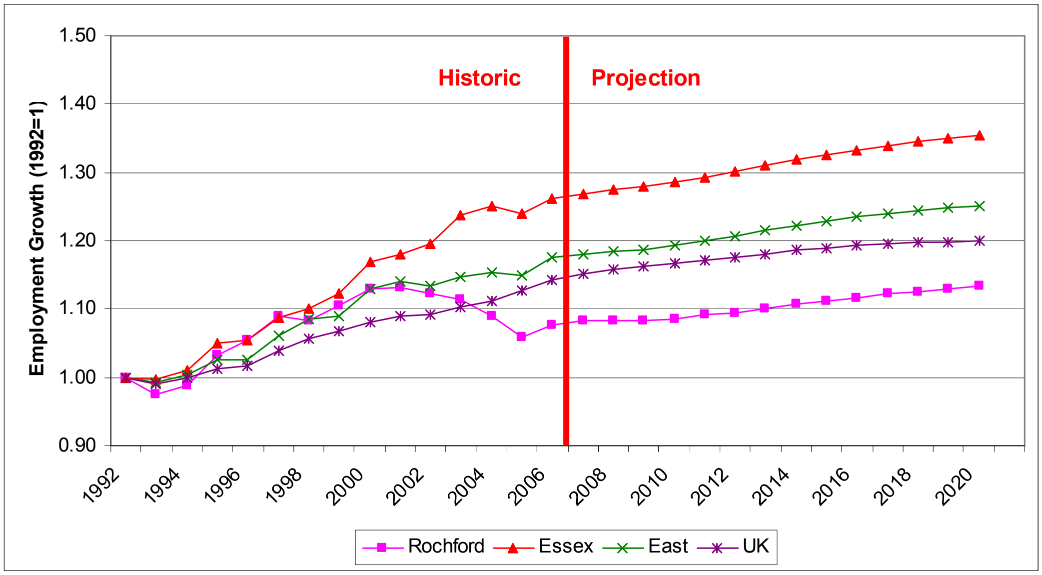
3.46 There is an indication that the employment profile within rural Rochford is not as “high value” as urban Rochford. This is demonstrated through a lower proportion of employees in the FBS sector and “knowledge intensive” employment in the selected rural wards compared to urban wards. This is indicative of the propensity for office employment and higher value employment to be in urban areas as they are more accessible and attractive places to work.

3.47 However, the evidence on the population within rural Rochford does not suggest an urban/rural split. Both in skills and occupation data shows that Rochford is performing at least at the same level if not better than urban Rochford at the time of the Census in 2001. This suggests that the rural areas of Rochford provide the homes for those with higher value jobs. The reason for this is most likely to be that rural areas are more desirable to live in and therefore have better quality housing and higher house prices. This then attracts higher earning residents to the area attracted by the quality of housing and standard of living.

ECONOMIC OUTLOOK

3.48 Overall employment levels in Rochford are projected to rise at a much slower level than both Essex and the East of England, though some of this gap closes slightly nearer to 2020. This is shown in Figure 19.

Figure 19 – Employment Projections 1992 – 2020

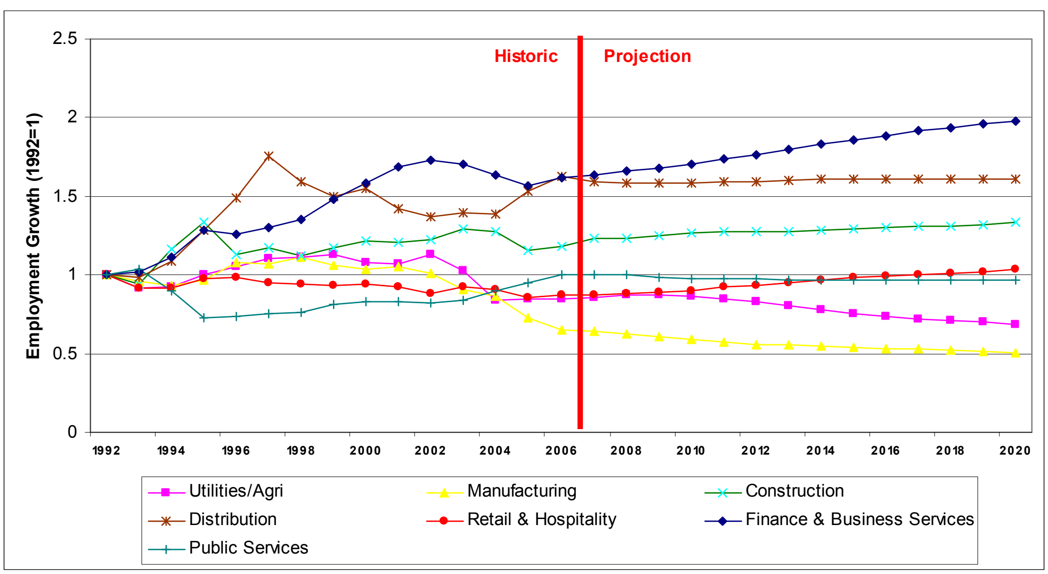


Source: Experian Business Services / GVA Grimley

SECTOR PROJECTIONS

3.49 The sectoral projections show that FBS, Distribution and Construction are the sectors that are projected to grow to 2020 in Rochford. Manufacturing and Agriculture/Mining/Utilities are projected to fall between now and 2020 as shown in Figure 20.

Figure 20 – Employment Projections by Sector in Rochford 1992 -2020



Source: Experian/GVA Grimley 2006

4. COMMERCIAL PROPERTY MARKET ANALYSIS

INTRODUCTION

4.1 The purpose of this property market assessment is to demonstrate the key characteristics of the commercial property market of Rochford district. The approach taken is to examine changes in the total stock of industrial and office floorspace, past take-up rates, availability and rental trends. The report is compiled into two sections focusing separately on the office and industrial markets within Rochford

OFFICE MARKET

4.2 The main office locations within Rochford district are situated in Rochford and Rayleigh. Throughout the district, enquiries are for units of varying sizes with interest mainly being shown by local businesses. There is a lack of new space in the area with the existing stock being either second hand or recently refurbished.

4.3 The District itself is not regarded as a significant office location and this is reflected in the amount and quality of accommodation available. The main site for office accommodation is within Rochford itself at Locks Hill which houses a number of buildings which include Maltings, Rumsey House, Canewdon House, Cottis House and Bradley House.

4.4 There are new office developments south of the A127 in Rayleigh but this is within the Southend District. However, agents specify that the key difference between Rayleigh and the rest of the district is that it possesses greater accessibility. With the Brook Road Industrial Estate north of the A127 within Rochford similarly well connected, agents view this as a potentially viable out of town office location.

4.5 Table 4 indicates that since 1998 there has been an increase of 18.4% of office stock in Rochford District. This is in line with the rise of the FBS sector in the UK in general and represents comparable growth to the East of England but is slightly below the national trend. This is shown in Table 4.

Table 4 Office Stock in Rochford District 1998-2007

Area	Office Stock (m^2 "000)		Change Since 1998
	1998	2006	
Rochford	38	45	18.4%
East of England	7,234	8,467	17%
England	78,973	95,809	21.3%

Source: VOA

4.6 As well as an increase in stock, VOA data shows that commercial property vacancy levels within Rochford are below that of the East of England and England itself, indicating a relatively healthy market.

Table 5 – Commercial Property Vacancy Levels in Rochford District 2007

Area	Vacancy Rate
Rochford	6%
East of England	8%
England	9%

Source: VOA

TAKE-UP

4.7 Table 6 shows that the office market is characterised by low take-up levels for units of 1,850 sq m and above. This highlights a major problem for the market in that it cannot attract a large-scale occupier. However, for other units sizes take-up has been spread across the small to medium sized office units.

Table 6 - Average Annual Office Take Up in Rochford District (1998-2008)

Floorspace Range	Rochford Average Annual Take-up	
	Absolute (m^2)	% Total
<185 sq.m	169	32.5%
185 – 465 sq.m	195	37.5%
465 – 1,850 sq.m	155.8	30%
1,850 sq.m +	n/a	n/a
TOTAL	519.8	100%

Source: EGI/FOCUS

4.8 Agents were unanimous in their views that Rochford is highly unlikely to attract an occupier for offices of a large scale, and that any building would have to be designed to be multi-let, with significant incentives being offered and the understanding that the building may have long periods where space will be vacant.

RENTS

4.9 Based on available property market information and discussions with agents, second hand office rents throughout the Rochford district are in the region of £86 - £105 per sq m (£8-£10 per sq ft). This varies depending on the size and location of the property. Table 7 details rents which have been achieved throughout the district since 2006 and is shown below:

Table 7 – Transactions Involving Office Space within Rochford District

Address	Size (sq m)	Price (£ sq m)	Date
Unit 39 Review House, Websters Way	128	£46	15/08/07
37 West Street	144	£132	23/07/07
Cottis House (Bradley Street)	141	£102	01/02/07
Unit 35 Review House, Websters Way	128	£62	23/11/06
12-12a Station Road, Rayleigh	79	£139	14/11/06
Unit 2 Imperial Park, Rawreth Lane	19	£209	14/11/06
1st Floor Cottis House (South Street)	141	£100	08/12/06
14-16 South Street	122	£123	24/07/06
Suite 4, Main Road, Hockley	59	£121	04/07/06
Stonebridge House, Main Road, Hockley	72	£134	13/03/06

Source: EGI and FOCUS

AVAILABLE FLOORSPACE

4.10 There is a range of available floorspace within Rochford District, with the majority available in Rayleigh. Within Rochford itself Cottis House at Locks Hill has high availability. Our research shows that 81% of the 279 sq m (3000 sq ft) building is vacant and that interest in the property has been moderate, suggesting a slow office market currently in the town of Rochford itself.

Table 8- Available Office Floorspace within Rochford District

Address	Size (sq m)	Size (sq ft)	£ per sq m	£ per sq ft
6 Church Street, Rayleigh	37	398	£189	£17.60
Burley House, R/O 15-17 High Street (Rayleigh)	102	1,100	£135	£12.50
123/153 High Street, Rayleigh	305	3,280	£87	£8
Totman Close, Brook Road Industrial Estate, Rayleigh	311	3,349	£80	£7.50
Cottis House, Locks Hill, Rochford	86	925	£122.50	£11.40
Cottis House, Locks Hill, Rochford	141	1517	£103	£9.60
Spa House, 69 Southend Road (Hockley)	98	1,055	£79	£7.30

Source: EGI and FOCUS

4.11 Table 8 also indicates the comparatively low rental values of office properties in the District, which suggests developing new office stock would be unviable for any investor at this moment.

Table 9 Office Availability and Take-Up by Size in Rochford District

Floorspace Range	Available Floorspace (m^2)	Annual Avg. Take-up (m^2)	Notional Years Supply
<185 sq.m	727	169	4
185 – 465 sq.m	1,643	195	8
465 – 1,850 sq.m	3,014	155.8	19
1,850 sq.m +	n/a	n/a	n/a
TOTAL	5,384	519.8	10

Source: EGI

4.12 Table 9 further demonstrates the lack of demand for larger units with excess supply of units over 465 m^2. This is in contrast to smaller office units with tight supply on units less than 185 m^2 and ample supply of units between 185 and 465 m^2.

INDUSTRIAL

4.13 The main industrial locations within Rochford district are in the towns of Rochford and Rayleigh. Our research indicates that the industrial market for B8 units is strong, but only for those sites that are well located in respect of the transport and infrastructure network. Agents advise that within Rochford there is a greater demand for industrial land than offices. Enquiries are for units of all sizes. The existing stock is predominantly second hand and is in some cases 30 years old.

4.14 In Rochford, Purdeys Industrial Estate is 94.55 acres (38.266 ha) and accommodates a vast number of industrial estates such as Roach View Business Park, which was completed approximately 5 years ago. A significant feature of the estate is its relatively close proximity to the A127 which is one of the main trunk roads in the Essex area.

4.15 Brook Road Industrial Centre is directly north of the A127 and is the focal point of the industrial activity within Rayleigh. The principal occupiers within the centre are local distributors.

4.16 Table 10 shows that Rochford has seen a decrease in the amount of stock since 1998. This is not in line national trends and demonstrates a potential problem in providing appropriate employment land within the District.

Table 10 Industrial Stock in Rochford District 1998-2007

Area	Industrial Stock (m² '000)		Change Since 1998
	1998	2006	
Rochford	300 sq m	284 sq m	-5.3%
East of England	33,738 sq m	35,465 sq m	5.8%
England	336,410 sq m	348,814 sq m	3.4%
Total	370,448 sq m	383,935 sq m	3.6%

Source: EGI/FOCUS

TAKE UP

4.17 Table 11 shows the average annual industrial take-up in Rochford District since 1998. Demand is for units of all sizes and reflects the views of agents that Rochford attracts all types of industrial trades, but has a concentration of larger scale units.

Table 11 - Average Annual Industrial Take Up in Rochford District (1998-2008)

Floorspace Range	Rochford Average Annual Take-up	
	Absolute (m^2)	% Total
<185 sq.m	236.5	7%
185 – 465 sq.m	402.9	12%
465 – 1,850 sq.m	1,201.4	36%
1,850 sq.m +	1,522	45%
TOTAL	**3362.8**	**100%**

Source: EGI/FOCUS (2008)

4.18 Within the Rochford District demand for industrial units principally comes from local businesses although there are a small number of national distributors such as MFI and Homebase.

RENTS

4.19 Local agents indicate that the average rent for second hand industrial units is in the region of £70-£75 per sq m (£6.50-£7 per sq ft). These values are dependent upon the location and size of the property in question. Table 12 provides examples of rents that have been achieved recently within the District.

Table 12 - Transactions Involving Industrial Space within Rochford District

Address	Size (sq m)	Price Per Sq m	Date
11 Star Lane Industrial Estate	158	£58	15/01/08
Unit 3 Rocheview Business Park	150	£70	01/11/07
Unit 11 Robert Leonard Industrial Estate, Aviation Way	131	£75	01/08/07
1 Brook Close	39	£127	15/06/07
Unit 13 Robert Leonard Industrial Estate, Aviation Way	112	£73	06/06/07
13 Brook Road, Rayleigh	191	£65	15/05/07
Unit 16 Riverside Industrial Estate	146	£75	15/12/06
Phase ii 19-20 Roach View	933	£71.50	08/03/06

Source: FOCUS and EGI

4.20 Agents have indicated that there is a difference in rents being achieved within Purdeys Industrial Estate which is a result of a variance in quality between the units, largely relating to when they were developed. Agents indicate that appropriate rents for units within Purdeys Industrial Estate should be in the region of £53-£65 per sq m (£5-£6 per sq ft), with a similar figure on Brook Road in Rayleigh.

AVAILABILITY

4.21 Table 13 details industrial space currently available for letting. There is a spread of supply for unit size although there is an absence of small (less than 185 m^2) and large (more than 1,850 m^2) on the market.

Table 13 - Available Industrial Floorspace within Rochford District

Address	Size sq m	Size sq ft	£ per sq m	£ per sq ft
67 Stadium Way, Rayleigh	658	7,080	£68	£6.35
15 Totman Crescent, Rayleigh	574	6,174	£61	£5.66
Unit 26 Hockley Trading Estate, Eldon Way, Hockley	322	3,470	£56.60	£5.25
18 Sirdar Road, Brook Road Industrial Estate, Rayleigh	337	3,628	£55	£5.10
Unit 17 Purdeys Industrial Estate	498	5,360	£53	£4.90
Unit 14, Brook Road, Brook Road Industrial Estate, Rayleigh	255	2,747	£51.75	£4.80
Sutton Wharf, Rochehall Way	1,171	12,605	£44.50	£4.15
Unit 6 Hockley Trading Estate, Eldon Way, Hockley	975	10,500	£38.35	£3.56

Source: FOCUS and EGI

4.22 Table 14 indicates that notional years supply confirms this view with a tight supply of small stock and expected supply in other unit sizes.

Table 14 – Industrial Availability and Take-Up By Size In Rochford District

Floorspace Range	Available Floorspace (m^2)	Annual Avg. Take-up (m^2)	Notional Years Supply
<185 sq.m	491	236.5	2
185 – 465 sq.m	2265	402.9	6
465 – 1,850 sq.m	4920	1201.4	4
1,850 sq.m +	5987	1522	4
TOTAL	13,663	3,362.8	4

Source: EGI

CONCLUSION

4.23 Rochford is characterised by a much stronger industrial than office market. This is reflected in the difference in the amount of stock within the District. The current office stock is 45,000 square metres compared to 284,000 square metres of industrial stock.

4.24 There are a number of significant Industrial units let within the District with major employers such as MFI located there. Its links to the A127 in Rayleigh make it a desirable location for industrial employers and is a strength which can be developed in future years.

4.25 Our discussions with the Council confirm that there are no new office developments currently being constructed within Rochford. However the recently developed Vantage House, which actually falls within Southend on the District boundary line, is a recent office development. It is just over 50% full which demonstrates the problem of sizeable developments not attracting occupiers of a similar scale in this part of Essex. However, it does indicate that this area in the West of the District and close to the A127 represents a good strategic office location within which office development could be placed to meet future need.

4.26 We conclude that the lack of new development in Rochford shows a combination of both low demand and low capital values, which make it unviable to build new, high specification offices within the District at this moment. However, access to the A127 is a key factor in the viability of out of town office builds in Rochford District and this is an important consideration when deciding on strategic employment land policies for the District.

5. EMPLOYMENT FLOORSPACE DEMAND PROJECTIONS

METHOD

5.1 To establish the future gross employment floorspace requirements in Rochford to 2021 a four step approach has been applied based on:

1) Allowance for Economic Growth
2) Allowance for Windfall Losses
3) Allowance for Churn
4) Allowance for Economic Development Aspirations

5.2 Each of these steps is described in more detail below.

ALLOWANCE FOR ECONOMIC GROWTH

5.3 The allowance for economic growth takes into account the projected employment changes presented in Chapter 3. These are based on a macroeconomic model provided by Experian Business Services. The forecast distinguishes between 30 economic sectors[7]. Employment in the 30 sectors is converted into employment in four floorspace use types as follows:

- **Office (B1a/b)**: pure office space, not including office space in shopping areas such as banks, estate agents and betting shops (A2 office space) and premises for research and development of products or processes.
- **Other Business Space (B1c, B2)**: including premises for light industry and general industry.
- **Warehousing (B8)**: premises used for storage or distribution centres.
- **Non-B-Use-Class**: any other premises in which employment might occur such as shops, health and medical centres, schools, hotels, restaurants and leisure facilities, etc.

5.4 For the conversion of the 30 economic sectors into the four floorspace use types a matrix has been used which is based on the ODPM Employment Land Review Guidance with some refinements based on 4-digit-SIC analysis of current employment in the District. The

[7] In Chapter 3 we have presented the employment forecast in an aggregated version.

conversion matrix assigns a proportion of the employees in each of the 30 economic sectors from the employment forecast to one or more of the four floorspace use types.

5.5 As a next step the employment in the three B-Use-Class floorspace types is converted into floorspace using the following employment densities which are in line with the ODPM Employment Land Review Guidance:

- Office 18 sq m per employee
- Other business space 32 sq m per employee
- Warehousing 55 sq m per employee[8]

ALLOWANCE FOR WINDFALL LOSSES

5.6 The allowance for windfall losses takes into account that a proportion of designated employment land will not be entirely used by traditional B-Use-Class employment.

5.7 Land uses such as recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be allocated on employment land.

5.8 A significant part of the projected employment growth arises from sectors which have traditionally not been located on employment land such as healthcare, education, hotels and leisure. Recent planning experience has shown that under specific circumstances and where appropriate such uses might be allocated on employment land. However this has to be monitored carefully to ensure there is enough available land for B-Use-Class employment on employment land.

5.9 Under specific circumstances and where appropriate employment land might also be used for other uses to enable employment development to come forward.

5.10 The allowance for windfall losses also takes into account the need for a flexible supply of employment land. Allowance has to be made for a range of different needs by the economy which might change over the next 20 years.

5.11 To estimate the amount of land needed for windfall losses historic losses have been used as a guideline as reported in the District's Monitoring Report.

[8] Warehousing employment densities typically range between 50 sq m for general warehousing and 80 sq m for large scale and high bay warehouses. As large parts of the sub-region are not suitable / attractive for large scale warehousing we have used an employment density only slightly higher than for general warehousing.

ALLOWANCE FOR CHURN

5.12 Locational and premises needs of businesses change over time. This requires businesses to move. In other cases an existing business might cease its operations and a new business takes over a site for redevelopment. For this to happen smoothly there is a need for certain level of vacant land. This type of demand has been called 'churn' demand or 'frictional vacancy'.

5.13 In our experience it takes typically around two years time for achieving planning consent, site preparation and construction after site has changed hands. To estimate the churn demand we have taken the annual net take-up of employment floorspace and multiplied it by two.

ALLOWANCE FOR ECONOMIC DEVELOPMENT ASPIRATIONS AND OTHER FACTORS

5.14 So far the employment land projection is based on macroeconomic forecasting. The model behind this forecast is driven by national and regional trends, growth trends in specific sectors and takes into account the local sector distribution and performance. Macroeconomic models however do not take into account local economic development activities. In this step of the forecasting process the local economic development aspirations are considered and their quantitative and qualitative effect on future employment floorspace requirements.

5.15 At this stage other factors which might influence future employment floorspace demand, such as changes in working practice, are also considered.

5.16 In the remaining part of this Chapter the data for each of the steps of the employment floorspace demand forecast is presented. This provides demand based requirements for our "base case" and two scenarios based on the London Southend Airport Joint Area Action Plan (JAAP).

5.17 The employment floorspace supply is then assessed in Chapter 6. Chapter 7 compares the current employment land supply with the projected gross demand again for our base case and two specified scenarios. The resulting net demand is then translated from floorspace into land demand by use types (office, other business space and warehouses). At this stage final employment land requirements are produced for office (B1a and B1b) and Other Business Space and Warehousing are combined to give employment land requirements for industrial (B1c/B2/B8) uses. This results in a more robust forecast and is justified due to the similar land requirements that other business space and warehousing have. Floorspace demand is translated into employment land applying the following plot ratios which are in line with the ODPM Guidance on employment land reviews:

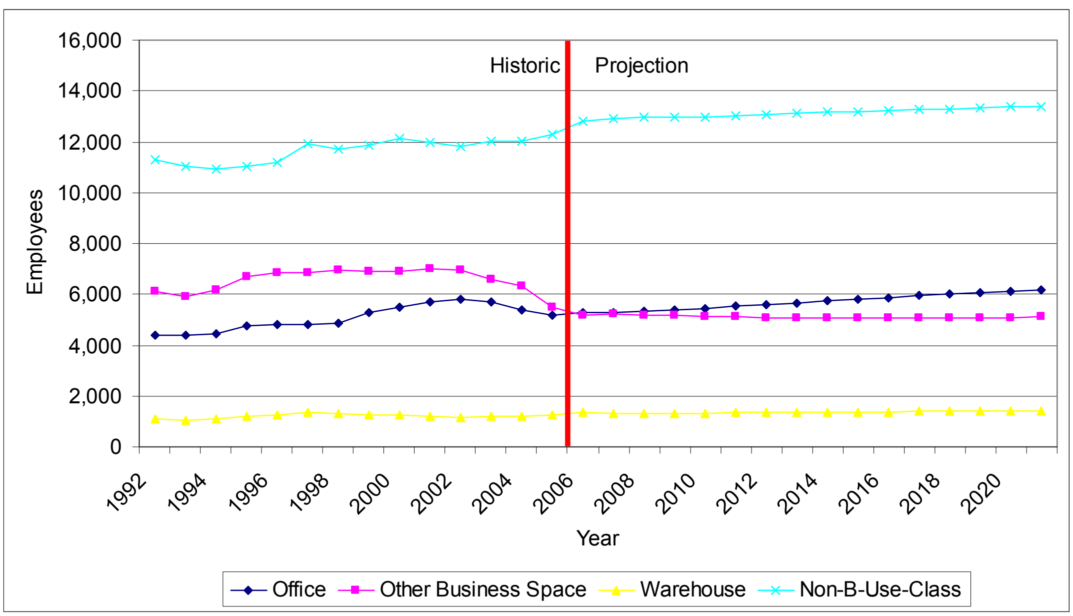
- Office: 0.8 Plot Ratio
- Industrial: 0.4 Plot Ratio

ALLOWANCE FOR ECONOMIC GROWTH

5.18 In Chapter 3 employment projections by broad sectors have been presented. Total employment is projected to grow by 5.3% between 2006 and 2021. The growth sectors are Finance & Other Business Services (22.5% employment growth between 2006 and 2021), Retail and Hospitality (18.3%) and Construction (13%). Employment is projected to fall between 2006 and 2021 in Manufacturing (-22.8%), Agriculture/Mining/Utilities (-18.8%) and Public Sector Services (-3%). Employment in the Distribution sectors is projected to stay more or less stable (-0.7%).

5.19 Aggregating the employment changes into employee numbers based on floorspace type shows that the highest numbers of employees are currently, and will continue to be, in the Non-B-Class sectors. Employment in office space is significantly below the numbers employed in Non-B-Class sectors but is projected to increase in the years up to 2021. The number of employees in other business space and in warehousing is set to remain steady. This is shown in Figure 21.

Figure 21 – Employee numbers by use type and projections until 2021



Source: GVA Grimley / Experian Business Services

5.20 As a next step the employment demand from the B-Use-Class floorspace types (Office, Other Business Space and Warehouses) is translated into floorspace demand using standard employment densities. The demand from the Non-B-Use-Class floorspace type is not quantified as it is not the focus of the Employment Land Study.

5.21 The result is that demand for employment floorspace resulting from economic growth is forecast to increase by 16,919 square metres between 2006 and 2021. This is broken down into the various floorspace types in Table 15.

Table 15 – Changes in Floorspace in Rochford 2006 to 2021

	Employee Change 06 – 21	Employment Density	Floorspace Change 06 -21
		m^2 per employee	m^2
Office	883	18	15,887
Other Business Space	-74	32	-2,368
Warehouse	68	50	3,400
Total	**877**	**19**	**16,919**

Source: GVA Grimley/Experian (2006)

5.22 Of the three different floorspace use types office floorspace demand is projected to grow the most between 2006 and 2021. Demand for warehouse floorspace is projected to grow slightly and demand for other business space is projected to decline between 2006 and 2021.

5.23 So far future employment floorspace demand resulting from economic growth as been considered. As a next step the allowance for windfall losses is taken into account.

ALLOWANCE FOR WINDFALL LOSSES

5.24 The allowance for windfall losses takes into consideration the fact that for various reasons under specific circumstances some employment land might be used for other purposes (see paragraph 5.6 ff). To estimate the windfall losses reference to historic losses has been made. According to the Annual Monitoring Reports (AMR) for Rochford District, which are available from 2004/5 to 2006/7 the amount of employment land lost to non employment use is as follows:

- 2004/5: 500 m^2
- 2005/6: 0m^2
- 2006/7: 2,376 m^2

5.25 Taking the median loss (500 m^2) of the past three years and multiplying this by 15 years an estimated 7,500 m^2 of employment land might be lost to other uses between 2006 and 2021.

ALLOWANCE FOR CHURN

5.26 The allowance for churn (or frictional vacancy) takes into account that a certain amount of vacant floorspace is required for the commercial property market to work effectively. To estimate the churn demand we have taken the annual net take-up of employment floorspace as a guide.

5.27 The most recent AMR's show that the amount of commercial floorspace developed on previously developed land in Rochford is as follows:

- 2004/5: 800 m^2
- 2005/6: 1,114m^2
- 2006/7: 2,376 m^2

5.28 In our experience it takes around two years for a property to be redeveloped (see methodology, paragraph 5.12 ff). Taking the median of developed floorspace on previously developed land of the past three years and multiplying it by two results in a demand for churn for employment floorspace of 2,228m^2.

ALLOWANCE FOR ECONOMIC DEVELOPMENT ASPIRATIONS AND OTHER FACTORS

ECONOMIC DEVELOPMENT ASPIRATIONS

5.29 In addition to employment projections based on forecasts it is important to consider the impact that economic aspirations will have on employment growth in Rochford throughout the planning period. The major factor likely to have a significant effect on employment levels in Rochford District is the scale of development at London Southend Airport. Our demand and supply analysis based on economic forecasts does not take a significant increase in airport related employment into consideration, as it is considered extraneous to past employment growth on which future growth projections are made. For these reasons we have also not included potential increased employment supply from the Airport in our base case. It is therefore necessary to make provision for the growth aspirations of London Southend Airport and factor this into the overall supply and demand balance within the District.

5.30 The Airport is the subject of a Joint Area Action Plan (JAAP) between Rochford District Council and Southend-on-sea Borough Council. It is treated as a stand-alone development within this document and employment implications are considered for the Airport area in isolation. However, we now apply these assumptions from the JAAP to ensure a robust Employment Land Review for Rochford District.

5.31 Applying these assumptions to Rochford District holds intrinsic difficulties as the Airport spans the borders of both Rochford and Southend-on-sea and a rationale has to be devised to assess the likely impact on Rochford District. There are also various scenarios set out in the Issues and Options Document[9] of the JAAP and each must be considered to give a range of possible outcomes for Rochford District.

APPORTIONING DEMAND AND SUPPLY AT THE AIRPORT TO ROCHFORD AND SOUTHEND

5.32 Our overall approach to apportioning demand and supply increases from London Southend Airport to Rochford District is to take the estimated increase of jobs and floorspace at the Airport and apportion that based on the current employment levels in Rochford and Southend. Implicit within this approach is that the aspirations for employment growth outlined in the Regional Spatial Strategy for the East of England. Are included in the job increases for London Southend Airport

5.33 This is then aggregated into the various use types using the current proportion of employees in Office, Other Business Space and Warehouse.

SCENARIOS

5.34 There are a number of scenarios outlined within the Issues and Options Document of the JAAP that are now considered in turn:

- Scenario 1: Low Growth (do minimum)
- Scenario 2 (a): Medium Growth
- Scenario 2 (b): Medium Growth – “Aviation Cluster”
- Scenario 3: High Growth

SCENARIO 1: LOW GROWTH (DO MINIMUM)

5.35 This scenario assumes that London Southend Airport will continue in its current form with limited investment and incremental growth based on the current airport boundaries. Intensification of existing employment stock would provide an additional 620 jobs in around 15,000 m^2 of office/light industrial floorspace within the airport boundaries.

[9] The most up to date document available at this time.

5.36 On a demand level there is no change from our base case as there are no significant increases in employment expected under the "do minimum" option.

5.37 However, employment land intensification provides an increase in supply of 15,000 m^2.

This results in the following assumption for Scenario 1:

- Demand = Base Forecast
- Supply = Base Supply + 15,000 m^2 * $\frac{\text{Rochford Employees}}{\text{Southend Employees + Rochford Employees}}$

SCENARIO 2 (A): MEDIUM GROWTH

5.38 Scenario 2 (A) assumes medium growth at the Airport facilitating the construction of a new business park facility for the wider sub region. This would provide an increase of an estimated 64,000 m^2 of new floorspace and 2,600 new jobs.

5.39 The projected growth in demand for Rochford is calculated by apportioning the estimated 2,600 jobs using the current employment ratio between Rochford and Southend and applying this to Rochford District.

5.40 Intensification and the development of a new business park results in an increase in employment supply at the Airport of 64,000 m^2.

5.41 This results in the following assumption for Scenario 2(A)

- Demand = Base + 2,600 jobs * $\frac{\text{Rochford Employees}}{\text{Southend Employees + Rochford Employees}}$
- Supply = Base + 64,000 m^2 * $\frac{\text{Rochford Employees}}{\text{Southend Employees + Rochford Employees}}$

SCENARIO 2 (B): MEDIUM GROWTH – "AVIATION CLUSTER"

5.42 This scenario assumes medium growth at the Airport with an intensification of aviation related activities and the creation of an "aviation cluster." It targets 2,600 jobs and 64,000 m^2 of employment land based on intensification of existing employment land and construction of a new business park to support the aviation cluster.

5.43 As all of this employment growth and floorspace growth is within the aviation sector we consider this to be “self contained” within the JAAP boundaries. Therefore, all additional supply will be focussed on meeting the additional demand from the aviation sector. This scenario has therefore no effect on the demand and supply of employment land outside the JAAP boundary and is not considered further.

SCENARIO 3: HIGH GROWTH

5.44 The final scenario prescribes high growth at London Southend Airport which would see the airport become a driver for the sub-regional economy. In our view this is a combination of Scenario 2(A) and 2(B) which essentially results in the creation of an aviation cluster and an increase in employment levels in general commercial activity. This means that we treat Scenario 3 as having the same effect as Scenario 2(A) on the employment land demand and supply of Rochford outside the JAAP area.

EMPLOYMENT LAND SCENARIOS FOR ROCHFORD DISTRICT

5.45 By amalgamating the four scenarios outlined in the JAAP we are left with two scenarios with which to test our employment demand and supply. These are defined as follows:

SCENARIO A – LOW GROWTH AT THE AIRPORT

5.46 This scenario is Scenario 1 from the JAAP and this has no effect on the demand levels for Rochford District. This is explained in Paragraph 5.36. It does however have an effect of increasing the supply which will be discussed in Chapter 6.

SCENARIO B – HIGH GROWTH AT THE AIRPORT

5.47 This scenario is a combination of Scenario 2(A) and Scenario 3 from the JAAP and as shown in Table 17 has the effect of increasing the employment floorspace demand and supply throughout the planning period.

ASSESSMENT OF CHANGING WORKING PRACTICES

5.48 The issue of changing work practices and their effect on the space needed per employee in the future is a much debated topic. The theory is that the increase in home working, hot-desking and cost pressures on employers to use space more cost effectively results in higher employee densities per sq m.

5.49 A recent study[10] asserted that there was some evidence to support changing practices, with big employers such as BP and IBM requesting lower employment densities for their offices. However, a quantitative study of the South East[11] concluded that employment densities were not changing overall in the region and did not make any strong conclusions on changing work practice.

5.50 While there is no quantifiable evidence to suggest that employment densities are changing, the view that they will alter in the future is supported by a recent report by the Chartered Management Institute[12]. They predict that the workplace will undergo significant change by 2018. They cite pressures to reduce carbon footprint and an ageing population which will require more time looking after elderly relatives as key reasons for this change. This will result in more work from home and possibly an alteration in the number of days that an individual works per week.

5.51 While there is a strong consensus that working practices will change, there is a lack of detailed quantitative studies to give an idea of what it will mean for employment density requirements in the future.

SUMMARY

5.52 In summary, we have based forecasts on Experian Business Strategies and this gives an indication of employment needs into the future. We have made allowances for expected windfall losses and for churn demand. The allowances for windfall losses and for churn have been apportioned to the different floorspace use types according to their current size as shown in Table 16 as our Base Case employment floorspace requirements.

Table 16 – Base Case Employment Floorspace Requirements of Rochford District 2006 - 2021

	VOA Stock 2006	% of Total Stock	Floorspace Demand 2006 - 2021	Allowance for windfall losses	Allowance for Churn	Change in floorspace
	m^2	%	m^2	m^2	m^2	m^2
Office	45,000	13.7	15,887	1,969	305	18,161
Other Business Space	180,000	54.7	-2,368	7,860	1219	6,711
Warehouse	104,000	31.6	3,400	4,541	704	8,645
Total	**329,000**	**100**	**16,919**	**14,370**	**2,228**	**33,517**

Source: GVA Grimley

[10] Roger Tym & Partners, Ramidus Consulting & King Sturge (2006), The Use of Business Space in London
[11] DTZ Pieda (2004) Use of Business Space and Changing Working Practices in the South East
[12] Chartered Management Institute (March 2008): Management Futures – The World in 2018

SCENARIOS FOR ROCHFORD DISTRICT

5.53 The two scenarios relating to the possible development at the airport are now considered in turn to assess the effect of these on employment demand levels within Rochford District. This provides options within the final balance of supply and demand and allows for flexibility when planning future employment policies.

SCENARIO A – LOW GROWTH IN ROCHFORD

5.54 As previously outlined this Scenario A has no effect on the demand levels for Rochford District. This is explained in Paragraph 5.36.

SCENARIO B – HIGH GROWTH IN ROCHFORD

5.55 This scenario represents scenarios 2(A) and 3 from the JAAP, which have the same effect on employment land demand and supply in Rochford outside the JAAP area. As shown in Table 17 there is an increase in floorspace demand in Rochford District by 8,128 m^2 under Scenario B throughout the planning period.

Table 17 – Scenario B additional demand for employment floorspace in Rochford District

Additional Demand in Rochford	Employees #	Floorspace (sq m) m^2
Office	136	2,442
Other Business Space	130	4,144
Warehouse	31	1,542
Total	296	8,128

Source: GVA Grimley/JAAP

6. EMPLOYMENT LAND SUPPLY

INTRODUCTION

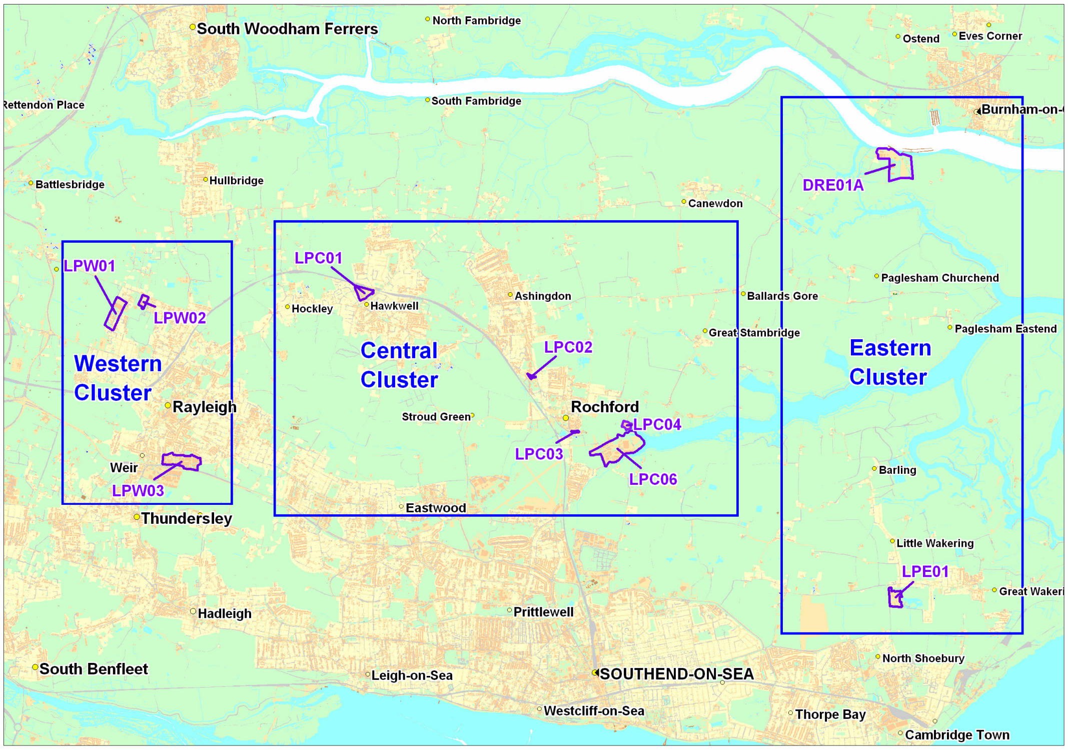
6.1 This chapter presents the findings on employment land supply based upon the site survey undertaken by GVA Grimley. It provides an analysis of the current employment land conditions within Rochford District.

6.2 The survey focuses on all employment land allocated within the current Local Plan in quantitative and qualitative terms. It does not look at other non allocated land or land at London Southend Airport as this is not within the scope of the study. While we do not assess employment land supply within the airport boundary it is the subject of consideration under possible future scenarios for employment land in Rochford District in Chapter 7.

BACKGROUND

6.3 All allocated employment land areas within Rochford District have been visited and assessed against an agreed set of criteria. In order to do this Rochford has been divided into three areas as shown in Figure 22.

Figure 22 – Surveyed Employment Sites in Rochford District



Source: Rochford Local Plan/GVA Grimley 2008

EMPLOYMENT LAND EAST

6.4 Employment Land East comprises of two sites: Starlane Industrial Estate (LPE01) in Great Wakering and Baltic Wharf (DRE01A).

EMPLOYMENT LAND CENTRAL

6.5 Employment Land Central has five sites in Rochford and Hockley. These are:

- Hockley Trading Centre, Hockley (LPC 01)
- Ashington Road, north of Rochford (LPC 02)
- Riverside, Rochford (LPC 03)
- Stambridge Mill, Rochford (LPC 04)
- Purdeys Industrial Estate, Rochford (LPC 06)

EMPLOYMENT LAND WEST

6.6 Employment Land West has three sites which are located in Rayleigh and its surrounding areas. These are:

- Rawreth Industrial Estate (LPW 01)
- Imperial Park Industrial Estate (LPW 02)
- Brook Road Industrial Estate (LPW 03)

6.7 Our analysis shows that a total of 98 ha of employment land has been surveyed as shown in Table 18.

Table 18 – Total Employment Land by Area (ha)

Land Use Type	Central	East	West	Grand Total
Other	1.8	21.8		23.6
Other Business Space	43.1	5.8	25.6	74.5
Grand Total	**44.9**	**27.6**	**25.6**	**98.1**

Source: GVA Grimley (Figures may not total due to rounding)

ANALYSIS

NON B CLASS USE

6.8 Of the ten allocated employment sites surveyed in Rochford four have a retail presence on them. Three of these are in the Central employment area, with both Hockley Trading Centre and Ashington Road containing 0% - 25% retail on them. Purdeys, the largest employment site in the District has between 25% - 50% in retail use.

6.9 In the West one site has a retail presence, the Brook Road Industrial Estate, which highlights the trend of mixed employment and retail uses on trading estates in the District. This is shown in Table 19:

Table 19 – Retail Uses on Employment Sites in Rochford District

	Number of sites and proportion of retail	
Location	**0-25%**	**25-50%**
Central	2	1
East	0	0
West	1	
Grand Total	3	1

Source: GVA Grimley Employment Site Survey

6.10 Among the allocated employment sites within Rochford there are none which contain residential development.

QUALITY OF STOCK

GOOD/VERY GOOD CONDITION

6.11 The quality of the building stock is low in Rochford with none of the employment sites considered to be in "very good" condition. One Central site, Ashington Road Industrial Estate, is considered to have over 75% of buildings in "good" condition. Two further Central sites, Purdeys and the Hockley Trading Centre, were considered to have between 50% and 75% of buildings in "good" condition.

Table 20 – Employment Sites in Rochford with buildings in "good" condition

	Good Condition		
Location	**50-75%**	**75-100%**	**Grand Total**
Central	2	1	3

Source: GVA Grimley Employment Site Survey

POOR/VERY POOR CONDITION

6.12 There are a relatively large amount of sites in Rochford where building quality is judged to be "poor" or "very poor." Both Rawreth and Brook Road Industrial Estates in the West have more than 75% of stock in poor condition, and this is also the case in Stambridge Mill in the Central cluster. Starlane Industrial Estate in the Eastern cluster also has between 50% and 75% of buildings in poor condition. Both Hockley and Purdeys in the Centre have between 0% and 25% of buildings in "poor" condition.

6.13 Two sites, Riverside in the Central area and Starlane in the East have buildings considered to be in "very poor" condition.

Table 21 – Employment Sites in Rochford with buildings in "poor" condition

	Poor Condition		
Location	**0-25%**	**50-75%**	**75-100%**
Central	2		1
East		1	
West			2
Grand Total	2	1	3

Source: GVA Grimley Employment Site Survey

ACCESS TO AMENITIES

6.14 An important consideration for many employers is the access to facilities and amenities that their employment site has. This was therefore an important consideration in our survey and we assessed access to amenities of each site using the following criteria:

- **Very good:** Shops, restaurants and/or cafes and personal services within the business cluster or can be reached in a 5 minute walk. There is a selection of places for lunch; there is the possibility to do some shopping during lunch.
- **Good:** Shops, restaurants and/or cafes within a 5-10 min walk. There is some selection of places for lunch.
- **Poor:** Shops, restaurants and/or cafes within a 10-15 min walk. There is a limited selection of places for lunch.
- **Very poor:** Shops, restaurants and/or cafes more than 15 min walk away. No or very limited selection of places for lunch.

6.15 In Rochford, employment sites with good access to amenities are concentrated in the Central cluster of employment sites, where four sites have good access. One site in the West (Imperial Park) is judged to have good access to amenities, while the other two do not. Again, both Eastern sites are considered to have poor access indicating the concentration of Central sites with good access to amenities.

Table 22 – Access to Amenities for Employment Sites in Rochford

	Access to Amenities			
Location	**Good**	**Poor**	**Very poor**	**Grand Total**
Central	4	1		5
East			2	2
West	1		2	3
Total	**5**	**1**	**4**	**10**

Source: GVA Grimley Employment Site Survey

STRATEGIC SERVICING

6.16 The adequacy of servicing considers how well employment sites are serviced at a strategic level by roads and public transport. An effective employment location is well served by infrastructure allowing employees ease of access to and from the site, making it a practical and desirable location to work in for prospective employees.

DISTANCE FROM MOTORWAY JUNCTION

6.17 Reflecting the major road infrastructure of the District, where the M25 is the nearest motorway to the West, it is the Western employment locations that are the nearest to the motorway junctions. However, the site that is nearest to the motorway junction is still 21km away indicating the lack of good strategic road access in Rochford.

6.18 Central employment locations are, on average, 27 km from the nearest motorway junction while Eastern employment locations are 30 km away from the nearest motorway junction highlighting the distinctly poor access on the Eastern side of the District.

Table 23 – Average Distance to nearest Motorway Junction (km)

Area	Average Distance (km)
Central	27.1
East	30.1
West	21.7

Source: GVA Grimley

DISTANCE FROM A ROAD

6.19 In Table 24 the distance of employment sites from the nearest A Road are shown. The difference between Western employment sites and the rest of the District is again clear with all three sites in the West less than 1 km from the nearest A road. This compares to the Central employment area where four sites are between 1km and 3km away and one site is more than 3km away from the nearest A Road. Finally, of the two Eastern employment sites, one is less than 1km away from the nearest A Road and the other is more than 3km away. The site that is more than 3km away from the nearest A Road is Baltic Wharf indicating the strategic access issues associated with this site.

Table 24 – Employment sites and distance from nearest A Road

	Distance to A Road		
Location	**0 – 1 km**	**1 – 3 km**	**3km +**
Central		4	1
East	1		1
West	3		
Grand Total	**4**	**4**	**2**

Source: GVA Grimley

PUBLIC TRANSPORT PROVISION

6.20 As well as the road infrastructure, the public transport infrastructure is an important part of assessing the adequacy of employment sites. As a strategic assessment of each employment sites public transport provision we calculate the distance from the nearest local bus stop.

6.21 This results in the following criteria to assess to local bus services:

Very Good	0m – 100m
Good	100m – 200m
Poor	200m – 400m
Very Poor	Over 400m

6.22 Table 25 demonstrates that 60% of the 10 sites surveyed have very good or good local bus stop provision. Only 1 site was assessed as having very poor local bus stop provision which is Baltic Wharf in the East of the District.

Table 25 – Assessment of local bus stop provision

	Local Bus Stop Provision			
Location	**Very good**	**Good**	**Poor**	**Very poor**
Central	3	1	1	
East	1			1
West	1		2	
Total	**5**	**1**	**3**	**1**

Source: GVA Grimley

ADEQUACY OF SERVICING

6.23 The adequacy of servicing is an assessment of whether an employment site is correctly serviced for its use. This particularly relates to:

- The adequacy of road side loading/unloading
- Off road loading/unloading
- Loading bays

6.24 Table 26 shows that there is an even split of employment sites judged to have adequate servicing in Rochford. In total six out of ten employment sites have adequate servicing. In the Central employment cluster, three sites have adequate servicing while two do not. In the Eastern employment cluster, one site is adequately serviced while one is not. Finally, in the Western cluster two sites have adequate servicing, while one does not.

Table 26 – Number of Employment Sites with Adequate Servicing

	Adequacy of servicing	
Location	**No**	**Yes**
Central	2	3
East	1	1
West	1	2
Total	**4**	**6**

Source: GVA Grimley Employment Site Survey

ROAD ACCESS

6.25 In addition to assessing strategic road access it is also pertinent to assess the adequacy of road access to a specific employment site. For example, are the roads wide enough to accommodate HGV's on the site? This is another important factor in assessing the quality of employment sites in Rochford.

6.26 Table 27 highlights the even spread of employment sites with adequate road access with five sites having adequate access and five that do not. In common with the servicing assessment, two sites in the Central employment area have adequate road access, while three do not. Of the sites in the East, one has adequate road access and one does not. Finally, in the Western employment cluster two sites have adequate road access and one does not.

Table 27 – Number of Employment Sites with Adequate Road Access

Location	Adequate	Not Adequate
Central	2	3
East	1	1
West	2	1
Total	**5**	**5**

Source: GVA Grimley Employment Site Survey

SUMMARY

6.27 In summary, the Eastern employment cluster contains two employment site, Starlane Industrial Estate and Baltic Wharf. The quality of the commercial stock in this area is assessed as being in either “poor” or “very poor” condition. Similarly, the geographical location of both of these sites mean that access to amenities are poor as is strategic access, with the nearest Motorway junction around 30 km away. While strategic access is poor, Starlane Industrial Estate does have good road access at a site level and adequately serviced for its purpose as a general industry/business area. However, Baltic Wharf with its peripheral location is not adequately serviced for HGV’s and general industry with single track roads leading to the site. If this was to be further developed as an employment site it would require significant infrastructure improvements to ensure its suitability for commercial uses. Furthermore this site has very poor public transport access and would require investment in this area to ensure its sustainability.

6.28 In the central employment cluster there are five allocated employment sites and it has the highest quality of stock in District, with three sites having a significant degree of good quality buildings. The central location ensures that the vast majority of employment sites in this area have good access to services and amenities including public transport. In common with the entire District, strategic road access is poor with the nearest motorway junction on average around 27km away. Access at a site level is also mixed in the central cluster with three sites having adequate servicing and two having adequate road access.

6.29 The Western employment cluster has three sites and is typified by poor quality stock, in particular Rawreth and Brook Road Industrial Estates with over 75% of stock in poor condition. Both sites are also judged to have poor access to amenities due to their relatively isolated location. On the other hand the Imperial Park Industrial Estate which is located in Rayleigh town centre has good access to amenities and public transport.

6.30 While stock is poor the Western location means that strategic access is relatively good for its employment sites. The nearest motorway junction is on average 21 km away and all three sites are under 1km away from the nearest A road. The Western sites are by far the best placed to serve as strategic employment sites for the District.

6.31 Reflecting the mixed quality of the sites in the Western employment cluster, two have adequate site road access and servicing while one does not.

EMPLOYMENT FLOORSPACE AVAILABILITY

6.32 To assess the potential available employment land in the District we have considered vacant land and land with vacant buildings. The land area of the vacant land and the land with vacant buildings has then been translated into floorspace using a plot ratio of 0.8 for sites adequate for office use and 0.4 for sites adequate for industrial use.

6.33 Our findings derived from our employment land survey indicates available employment land equivalent to 1,600 m^2 in the District. This is shown in Table 28.

Table 28 –Land Supply – Vacant Employment Land (m^2)

Land Use Type	Central	East	West	Total
Other Business Space	0	1,600	0	1,600

Source: GVA Grimley

6.34 The site survey also identified vacant buildings. This amounts to a potential of available land of 12,560 m^2 in total as shown in Table 29. The largest single vacant building is at Stambridge Mills in the central employment cluster which could provide 7,200 m^2 of employment land. This is a former flour mill which has the potential to be redeveloped for commercial use. The District Local Plan prescribes that this site is suitable for B1 use only.

Table 29 –Land Supply – Employment Land from Vacant Buildings (m^2)

Land Use Type	Central	East	West	Total
Other Business Space	160	1,600	3,600	5,360
Other	7,200	0	0	7,200
Total	**7,360**	**1,600**	**3,600**	**12,560**

Source: GVA Grimley

6.35 We combine the total vacant land and vacant buildings which gives a total of 15,760 m^2 of employment floorspace supply for our base case as shown in Table 30.

Table 30 – Base Case available employment floorspace in Rochford District (m^2)

Land Use Type	Central	East	West	Total
Other Business Space	160	3,200	5,200	8,560
Other	7,200	0		7,200
Total	**7,360**	**3,200**	**5,200**	**15,760**

Source: GVA Grimley

SUPPLY SCENARIOS FOR ROCHFORD DISTRICT

SCENARIO A – LOW GROWTH AT THE AIRPORT

6.36 This scenario is Scenario 1 from the JAAP and this has no effect on the demand levels for Rochford District. This is explained in Paragraph 5.36. It does however have an effect of increasing the supply (shown in Table 31) in Rochford District by 1,708 m^2 throughout the planning period.

Table 31 – Additional Supply of Employment Floorspace in Rochford District under Scenario A

Additional Supply in Rochford	Floorspace (sq m)
Office	783
Industrial	925
Total	**1,708**

Source: GVA Grimley/JAAP

SCENARIO B – HIGH GROWTH AT THE AIRPORT

6.37 This scenario represents scenarios 2(A) and 3 from the JAAP, which have the same effect on employment land demand and supply in Rochford outside the JAAP area. As shown in Table 32 it has the effect of increasing the floorspace supply in Rochford District by 7,287 m^2 throughout the planning period.

Table 32 - Additional Supply of Employment Floorspace in Rochford District under Scenario B

Additional Supply in Rochford	Floorspace (sq m)
Office	3,340
Industrial	3,947
Total	**7,287**

Source: GVA Grimley/JAAP

7. BALANCING DEMAND AND SUPPLY

INTRODUCTION

7.1 The culmination of this Employment Land Study is to balance employment land demand and supply in order to assess the overall requirement for employment land in the District. This leads to a series of conclusions to inform spatial employment land policies within the District throughout the planning period.

7.2 The base case employment land demand and supply scenarios are set out in Chapter 5 and Chapter 6, as are the two Scenarios based on different assumptions on future activities at the Airport. We now combine supply and demand estimates to provide an assessment of future employment land requirements in Rochford District. The final stage is to transfer employment floorspace requirements into employment land requirements.

7.3 At this stage it is pertinent to combine Other Business Space and Warehousing requirements as their locational needs are generally the same as are the plot ratios on which land is built. We also apportion the employment land supply defined as"other" – ie no current use class to allow for overall demand and supply to be assessed. It is our view that the Stambridge Mills site with 7,200 m^2 of vacant floorspace is best suited for B1c (light industrial) use and is therefore included as supply in Industrial uses.

7.4 We do this under the following plot ratio assumptions, which are generally regarded as standard in published employment land literature

- Edge of town office: 0.8
- Industrial: 0.4

7.5 Our assumption is that any new office stock that will be built will be in out of town business parks and not in town centres and for that reason the plot ratio of 0.8 is used when transferring employment floorspace requirements into land requirements.

THE MARKET BALANCE

BASE CASE

7.6 Our base case analysis shows a requirement for a total of 2.3 ha of employment land in Rochford over the planning period to 2021. This is broken down as 2.2 ha of office space and 0.1 ha oversupply of industrial space.

SCENARIO A

7.7 Scenario A, low growth at London Southend Airport which increases supply in the District, shows a requirement for a total of 1.8 ha of employment land over the planning period. The effect of the increased supply is negligible on the office requirement which remains in need of 2.2 ha of land under this scenario. Increasing supply of industrial land results in an oversupply of 0.3 ha over the planning period to 2021.

SCENARIO B

7.8 Scenario B, medium growth at London Southend Airport, which increases both demand and supply in Rochford District gives an overall requirement for 2.5 ha of employment land throughout the planning period. The increase in demand and supply in office supply cancel each other out to leave a requirement of 2.2 ha of office space. There is small requirement for 0.3 ha of industrial land under this Scenario.

Table 33 – Requirements for B Class Space Compared with Supply in Rochford 2006 – 2021

Base Case	Demand m^2	Supply m^2	Balance m^2	Balance ha
Office	18,161	0	-18,161	-2.27
Industrial	15,356	15,760	404	0.10
Total	33,517	15,760	-17,757	-2.17
Scenario A				
Office	18,248	783	-17378	-2.2
Industrial	15,901	16,685	1329	0.3
Total	34,149	17,468	-16049	-1.8
Scenario B				
Office	20,603	3,340	-17,263	-2.2
Industrial	21,042	19,707	-1,335	-0.3
Total	41,645	23,047	-18,599	-2.5

Source: GVA Grimley

7.9 Under all the Scenarios (including the Base Case) there is an additional net demand for employment land for office of just over 2 ha and a more or less sufficient land supply for industrial uses.

RECOMMENDATIONS

OVERALL

7.10 Rochford's economy is projected to grow moderately in the future. Of the B-use-class employment it is specifically office employment which is projected to have significant grow. Employment land supply is tight in the District with very little available vacant land. The majority of the employment land supply results from sites with vacant buildings on them.

7.11 We therefore recommend that the District adopts strong policies to protect existing employment land. De-allocations of employment land allocated in the Local Plan should be compensated with allocations of new employment sites through the LDF. In addition there is a need for the allocation of additional 2 ha of employment land suitable for office use.

7.12 On an overall strategic level we recommend that land to the West of the District is considered as viable to be developed as employment land. It is strategically best placed to house such uses due to its relatively good connectivity to Southend and London. The East of England Plan also sets out the preference for employment land to be situated in well connected areas and urban centres in order to reduce commuting. This approach therefore has policy support and on a practical level is the most suitable area for employment land to be developed.

7.13 The Eastern parts of the District, on the other hand, are not strategically good locations for employment land. We therefore recommend that Rochford District Council consider the East as more suitable for housing and other uses when planning for future land use requirements.

OFFICE

7.14 Rochford is not a recognised office market and our property market analysis indicates that this is unlikely to change. This is mainly due to its strategic location with relatively poor road and rail links which make it a difficult place for workers to access.

7.15 However, office stock has increased by 18% since 1998 in the district and the forecasts are for strong growth in the FBS sector throughout the planning period. This results in a requirement for an additional 2.2 ha of office space in Rochford District until 2021. There is currently no supply of office stock in the pipeline under our base case scenario and only a small amount of office supply under our two scenarios which indicates that additional office space is required within Rochford in order to satisfy future economic requirements.

7.16 For these reasons we make the following recommendations for Rochford to develop the office market throughout the current planning period:

SAFEGUARD CURRENT OFFICE STOCK

The major office location within Rochford, at Locks Hill in the centre of Rochford itself, is not allocated as an employment site. Given the increasing future requirements for office stock set out in our base case and two scenarios we recommend that Rochford District Council should allocate the land at Locks Hill as employment land to emphasise the importance of the site for employment use. This will help to safeguard future office supply in the town centre.

DEVELOP LAND WEST OF RAYLEIGH

7.17 In order to satisfy the additional office demand in the District we recommend that Rochford District Council consider developing a portion of land west of Rayleigh, which is currently allocated as green belt, for employment use. This should principally be a mix of high quality office and industrial space. This approach should ensure that the green belt allocation west of Rayleigh is, on the whole, still protected.

7.18 The rationale for allocating land in Rayleigh is that it is well connected to London by road on the A127 and it is an ideal location for strategic employment development in the District. Our research shows that the West of the District is the most desirable location for employment mainly due to its strategic access. We also note that Claydon's Lane, a high quality office development, is situated to the South of the A127 in Southend-on-sea Borough. This suggests that the area will consolidate its position as a strategic office location during the planning period and a new development within Rochford District is a strategically sound place to develop office employment stock.

7.19 Specifically, we recommend that Rochford District Council investigate the viability of developing additional employment land around the green belt adjacent to Rawreth Industrial Estate to provide for extra office employment in the District, while still protecting the majority of the green belt in this area.

PROMOTE TOWN CENTRE OFFICE USE IN RAYLEIGH

7.20 There is no designated employment land in Rayleigh town centre. Given its comparatively strong strategic location we recommend that Rochford District Council investigate the possibility of allocating employment land within Rayleigh town centre for office use. This could be as part of a mixed use scheme. This is in line with national planning policy where employment in town centres is encouraged and will address some of the need for additional office supply.

SITES

7.21 There are no existing office sites within the District and we strongly recommend that Rochford District Council address this during the current planning period. A business park type office development, in a good strategic location, is needed, as is additional supply in town centres where possible, preferably Rayleigh given its strategic location.

7.22 We recommend the land West of Rayleigh to come forward for office development but encourage the Council to look into the viability of intensifying current development at any of its Western industrial park locations. In particular, we recommend Rochford District Council should consider office development at the following existing sites:

- Brook Road: Although current stock quality is poor there is potential for redevelopment and an office element to be included within this. It is also located near Vantage House which although in Southend District makes this area of the District a natural office location.
- Rawreth Industrial Estate: This is similar to Brook Road with poor quality stock but the adjoining green belt provides an opportunity to develop high quality office stock which is strategically located. We acknowledge that this site has particular environmental issues and has been identified, through the Urban Capacity Study, as a site that may be suitable for housing use. We recommend that the Council consider allowing a reallocation of this site to housing provided that the requisite employment land is provided elsewhere, preferably on a portion of the green belt land West of Rayleigh. This would be while ensuring that the majority of the green belt land is maintained.

INDUSTRIAL

7.23 Rochford is currently a stronger industrial location than office location. However, net additional demand for industrial land is very limited over the planning period. .

7.24 Additional demand is met in large part by the Stambridge Mill employment site which provides 7,200m^2 of employment floorspace which is around 50% of total requirements.

RECOMMENDATION FOR EXISTING SITES

- Starlane Industrial Estate: Given the quality of existing stock is very poor and its strategic location is also poor we would recommend that Rochford District Council consider reallocating this site for other uses. We also recommend that should this site be reallocated assistance should be given to existing firms to relocate elsewhere within the District.

- Baltic Wharf: This site adequately serves its current purpose in providing employment in port related activities. We therefore recommend that the Council safeguard the existing employment land at this site. However, it is our view that this site is not suitable for development for employment uses other than those related to the existing activities. This is due to its poor strategic location and its poor site access. We recommend that if the Council do consider development for other employment uses at this site then major infrastructure improvements should be implemented to ensure it is a viable employment location.
- Hockley Trading Centre: In our view, Hockley Trading Centre is a strategically well placed employment location. However, we recognise the ambitions of the Hockley Town Centre masterplan and that within this the Council should consider it to be allocated for other uses. However, we recommend that this reallocation happen only if provision is made within the masterplan for offices uses within Hockley Town Centre as part of a mixed use scheme.
- Ashington Road Industrial Estate: In our view this is a fit for purpose industrial estate and we recommend that Rochford District Council keep this site in its current use.
- Riverside Industrial Estate: Given the quality of existing stock is very poor we recommend that Rochford District Council considers measures to improve the quality of the estate. We also recommend Rochford District Council consider that it may be a suitable location to include more office stock within it to meet future requirements. Its central location make it a strategically good site for office use.
- Stambridge Mill: This is currently poor quality. We recommend that Rochford District Council consider safeguarding this site for light industrial use. We also recommend that the possibility of businesses from Starlane Industrial Estate relocating to Stambridge Mill are investigated.
- Purdeys Industrial Estate: This is a fit for purpose industrial estate which should be maintained and, if possible, expanded.
- Rawreth Industrial Estate: We acknowledge that this site has particular environmental issues and has been identified, through the Urban Capacity Study, as a site that may be suitable for housing use. We recommend that the Council consider allowing a reallocation of this site to housing provided that the requisite industrial employment land is provided elsewhere, preferably on a portion of the green belt land West of Rayleigh. This would be while ensuring that the majority of the green belt land and quality of environment remains protected.

- Imperial Park Industrial Estate: In our view this is a fit for purpose industrial estate and we recommend that Rochford District Council protects this site in its current use.
- Brook Road Industrial Estate: Due to its current poor quality stock we recommend that Rochford District Council considers measures to improve the quality of the estate and consider including high quality office accommodation to ensure it success as a high quality office/industrial location which is strategically well connected.

POTENTIAL SITES

- Land West of Rayleigh: In order to meet future employment land requirements we recommend Rochford District Council consider allocating a portion of land west of Rayleigh, currently designated as green belt, for a employment use which would address the need for office accommodation and the demand resulting from possible de-allocation of other industrial sites. This should ensure that the majority of the green belt land and quality of environment remains protected in this area.

Rochford District Council

Employment Land Review

Site Assessment

GVA Grimley Ltd

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Overview

Number	Name	Type	Policy Designation	General Condition of Environment	Total Area (ha)	Vacant Land (ha)	Land with Vacant Buildings (ha)	Total Available Land (ha)
LPW03	Brook Road	General Industry/Business Area	Employment Land	Poor	13.2	0	0.9	0.9
LPC06	Purdeys	General Industry/Business Area	Employment Land	Good	37.7	0	0	0
DRE01A	Baltic Wharf	Specialised Freight Terminals	Baltic Whart (EB7) / Essex Marina (EB8)	Very poor	21.8	0	0	0
LPW02	Imperial Park industrial Estate	General Industry/Business Area	Employment Land	Good	2.4	0.4	0	0.4
LPW01	Rawreth Industrial estate	General Industry/Business Area	Employment Land	Poor	10	0	0	0
LPC01	Hockley Trading Centre	General Industry/Business Area	Employment Land	Good	4.6	0	0	0
LPC04	Stambridge Mill	Sites for Specific Occupiers	Stambridge Mills	Poor	1.8	0	1.8	1.8
LPC02	Ashington Road	Heavy/Specialist Industrial Site	Employment Land	Poor	0.5	0	0.04	0.04
LPE01	Starlane Industrial Estate	General Industry/Business Area	Employment Land	Poor	5.8	0.4	0.4	0.8
LPC03	Riverside	General Industry/Business Area	Employment Land	Good	0.3	0	0	0
Total					**98.1**	**0.8**	**3.14**	**3.94**

Site Assessment

Brook Road

Site Number: **LPW03**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Ok park but some vacancies and could be improved**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0-25%**	**0**	**0**

Site Area and Availability

Site Area: **13.2 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **2**

Land area of sites with vacant buildings: **0.9 ha**

Are there buildings with potential for re-development: **Yes**

Condition of Employment Area

Overall condition of the environment in the employment area: **Poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**0**	**75-100%**	**0-25%**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**75-100%**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **0 km**

Distance to the nearest Motorway Junction: **22 km**

HGV access: **Issue**

Local Access

Access to public transport: **Poor**

Comments on local road access: **-**

Is local road access adequate? **Adequate**

Site Assessment

Access to amenities: **Very poor**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Adequate**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **Fine**

Environment

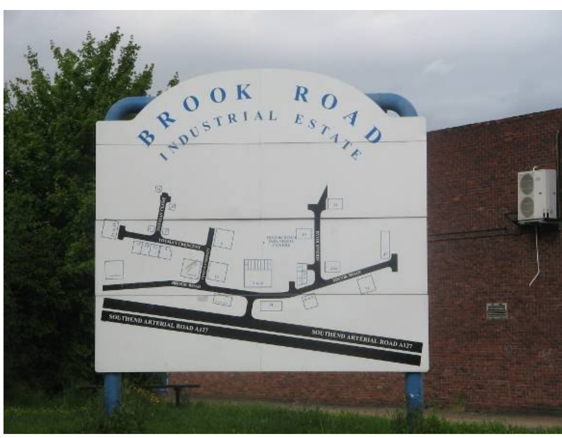
Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **-**



Site Assessment

Purdeys

Site Number: **LPC06**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Business Warehouse area with some retail**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**25-50%**	**0**	**0**

Site Area and Availability

Site Area: **37.7 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **0**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **No**

Condition of Employment Area

Overall condition of the environment in the employment area: **Good**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**0**	**0-25%**	**25-50%**	**25-50%**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**50-75%**	**0-25%**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **1.2 km**

Distance to the nearest Motorway Junction: **27.1 km**

HGV access: **No issue**

Local Access

Access to public transport: **Very good**

Comments on local road access: **Very tight roads**

Is local road access adequate? **Not Adequate**

Site Assessment

Access to amenities: **Poor**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Varies from unit to unit but generally very good**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **No problem parking**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
No	**No**	**No**	**No**	**Yes**	**No**	**No**

Comments bad neighbourhood issues: **Large number of HGV**


Site Assessment

Baltic Wharf

Site Number: **DRE01A**

Employment area type: **Specialised Freight Terminals**

Policy designation: **Baltic Whart (EB7) / Essex Marina (EB8)**

General description: **Old ship yard / wharf redevelopment**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **21.8 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **0**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **Yes**

Condition of Employment Area

Overall condition of the environment in the employment area: **Very poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**75-100%**	**0**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**0**	**75-100%**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **8.0 km**

Distance to the nearest Motorway Junction: **33.5 km**

HGV access: **No issue**

Local Access

Access to public transport: **Very Poor**

Comments on local road access: **Tight, bendy roads**

Is local road access adequate? **Not Adequate**

Site Assessment

Access to amenities: **Very poor**

Servicing and Parking

Road side servicing: **No** Off road servicing: **Yes** Loading bays: **No**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Adequate**

Parking

Is there adequate parking provision: **Don't know**

Comments parking provision **-**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
No	**Yes**	**No**	**No**	**Yes**	**No**	**No**

Comments bad neighbourhood issues: **Noisy manufactoring**

Site Assessment

Imperial Park industrial Estate

Site Number: **LPW02**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Mix of 80's and some new buildings access is also tight**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **2.4 ha**

Vacant Land: **0.4 ha**

Number of Vacant Buildings: **2**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **No**

Condition of Employment Area

Overall condition of the environment in the employment area: **Good**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**0-25%**	**75-100%**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0-25%	**50-75%**	**0**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **0.6 km**

Distance to the nearest Motorway Junction: **21.8 km**

HGV access: **Issue**

Local Access

Access to public transport: **Very good**

Comments on local road access: **Fine to get in**

Is local road access adequate? **Adequate**

Site Assessment

Access to amenities: **Good**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Adequate**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **Good access in front**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **-**


Site Assessment

Rawreth Industrial estate

Site Number: **LPW01**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Good quality buildings but poor internal access.**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **10 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **0**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **No**

Condition of Employment Area

Overall condition of the environment in the employment area: **Poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**75-100%**	**0**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**75-100%**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **0.2 km**

Distance to the nearest Motorway Junction: **21.1 km**

HGV access: **Issue**

Local Access

Access to public transport: **Poor**

Comments on local road access: **Not enough room to enter/turn**

Is local road access adequate? **Not Adequate**

Site Assessment

Access to amenities: **Very poor**

Servicing and Parking

Road side servicing: **Yes** Off road servicing: **Yes** Loading bays: **Yes**

Is servicing adequate for this site? **No**

Comments Servicing: **Very poor space to back / unload / turn**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **ok parking but tight turns**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **Yes, steep slope**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
No	**Yes**	**No**	**No**	**Yes**	**No**	**No**

Comments bad neighbourhood issues: **Industrial park smells**

Site Assessment

Hockley Trading Centre

Site Number: **LPC01**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Quite a good estate. Could be improved but adequate**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0-25%**	**0**	**0**

Site Area and Availability

Site Area: **4.6 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **0**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **Yes**

Condition of Employment Area

Overall condition of the environment in the employment area: **Good**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**75-100%**	**0**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**50-75%**	**0-25%**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **3.2 km**

Distance to the nearest Motorway Junction: **25.6 km**

HGV access: **No issue**

Local Access

Access to public transport: **Very good**

Comments on local road access: **-**

Is local road access adequate? **Adequate**

Site Assessment

Access to amenities: **Good**

Servicing and Parking

Road side servicing: **No** Off road servicing: **Yes** Loading bays: **Yes**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Adequate**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **looked adequate**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **-**

Site Assessment

Stambridge Mill

Site Number: **LPC04**

Employment area type: **Sites for Specific Occupiers**

Policy designation: **Stambridge Mills**

General description: **Disused flour mill. Ripe for redevelopment but poor access**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **1.8 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **all**

Land area of sites with vacant buildings: **1.8 ha**

Are there buildings with potential for re-development: **No**

Condition of Employment Area

Overall condition of the environment in the employment area: **Poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**75-100%**	**0**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**75-100%**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **2 km**

Distance to the nearest Motorway Junction: **27.8 km**

HGV access: **No issue**

Local Access

Access to public transport: **Poor**

Comments on local road access: **-**

Is local road access adequate? **Not Adequate**

Site Assessment

Access to amenities: **Good**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **No**

Is servicing adequate for this site? **No**

Comments Servicing: **n/a**

Parking

Is there adequate parking provision: **No**

Comments parking provision **N/A**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **-**

Site Assessment

Ashington Road

Site Number: **LPC02**

Employment area type: **Heavy/Specialist Industrial Site**

Policy designation: **Employment Land**

General description: **Run down business area**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0-25%**	**0**	**0**

Site Area and Availability

Site Area: **0.5 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **1**

Land area of sites with vacant buildings: **0.04 ha**

Are there buildings with potential for re-development: **Yes**

Condition of Employment Area

Overall condition of the environment in the employment area: **Poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**0**	**75-100%**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**75-100%**	**0**	**0**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **2.2 km**

Distance to the nearest Motorway Junction: **27.5 km**

HGV access: **Issue**

Local Access

Access to public transport: **Good**

Comments on local road access: **Good access is a little tight down the lanes**

Is local road access adequate? **Adequate**

Site Assessment

Access to amenities: **Good**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **Yes**

Comments Servicing: **Looked a bit tight**

Parking

Is there adequate parking provision: **No**

Comments parking provision **-**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **-**

Site Assessment

Starlane Industrial Estate

Site Number: **LPE01**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Run down industrial estate with some office stock, half recently demolished, could be redeveloped and then further developed**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **5.8 ha**

Vacant Land: **0.4 ha**

Number of Vacant Buildings: **1**

Land area of sites with vacant buildings: **0.4 ha**

Are there buildings with potential for re-development: **Yes**

Condition of Employment Area

Overall condition of the environment in the employment area: **Poor**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**50-75%**	**25-50%**	**0**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**50-75%**	**0-25%**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **0.6 km**

Distance to the nearest Motorway Junction: **26.1 km**

HGV access: **Issue**

Local Access

Access to public transport: **Very good**

Comments on local road access: **One bumpy entrance/exit off main road**

Site Assessment

Is local road access adequate? **Not Adequate**

Access to amenities: **Very poor**

Servicing and Parking

Road side servicing: **Yes** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **No**

Comments Servicing: **Very tight for turning**

Parking

Is there adequate parking provision: **No**

Comments parking provision **Very busy car park**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
Yes	**No**	**No**	**No**	**No**	**No**	**No**

Comments bad neighbourhood issues: **HGV and bus depot**


Site Assessment

Riverside

Site Number: **LPC03**

Employment area type: **General Industry/Business Area**

Policy designation: **Employment Land**

General description: **Bit of a mix. Good buildings but poor access**

Non B-Uses on site:

Housing	Retail	Community	Other Non-B-Uses
0	**0**	**0**	**0**

Site Area and Availability

Site Area: **0.3 ha**

Vacant Land: **0 ha**

Number of Vacant Buildings: **0**

Land area of sites with vacant buildings: **0 ha**

Are there buildings with potential for re-development: **No**

Condition of Employment Area

Overall condition of the environment in the employment area: **Good**

Age

Proportion of buildings:

Pre 1940	1940 – 1969	1970 – 1989	1990 – 1999	since 2000
0	**0**	**0-25%**	**75-100%**	**0**

Quality

Proportion of buildings in:

Very Good Condition	Good Condition	Poor Condition	Very Poor Condition
0	**0**	**0**	**25-50%**

Access, Servicing and Parking

Strategic Access

Distance to the nearest A-road: **1.3 km**

Distance to the nearest Motorway Junction: **27.1 km**

HGV access: **Issue**

Local Access

Access to public transport: **Very good**

Comments on local road access: **Poor access off main road. Behind fire station**

Is local road access adequate? **Not Adequate**

Site Assessment

Access to amenities: **Good**

Servicing and Parking

Road side servicing: **No** Off road servicing: **No** Loading bays: **Yes**

Is servicing adequate for this site? **No**

Comments Servicing: **Very tight for turning particularly HGV**

Parking

Is there adequate parking provision: **Yes**

Comments parking provision **-**

Environment

Are there any obvious signs of contamination: **No**

Topographical issues: **No,**

Bad neighbourhood issues

None	Noise	Air	Smell	HGV	Traffic	Other
No	**No**	**No**	**No**	**No**	**No**	**Yes**

Comments bad neighbourhood issues: **-**