



Report

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Employment Land Review Update Final Report

East Staffordshire Borough Council

August 2013



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For and on behalf of GVA Grimley Ltd

1. Introduction

Background

- 1.1 This report sets out the processes and findings of the East Staffordshire Borough Council (ESBC) Employment Land Review (ELR) update. It has been produced taking into account Office of the Deputy Prime Minister (ODPM) (as was) guidance on conducting ELRs (Employment Land Reviews – Guidance Note 2004) ('the guidance') and has been undertaken by GVA and GHK Consulting.

Brief

- 1.2 Since completion of the original ELR in 2009, undertaken by Jones Lang LaSalle, there have been a number of changes in the economic climate and national planning policy, including the publication of the National Planning Policy Framework (NPPF). This changing policy climate, alongside macro economic changes, the availability of updated secondary data and changes to the land supply support the need to undertake an update to the 2009 ELR evidence base.
- 1.3 This update exercise is noted to be particularly pertinent given the timescales for the production of the Local Plan and timely given the recent publication of the East Staffordshire Strategic Housing Market Assessment (SHMA). The timing of the commissioning of the employment and housing evidence was intentional to ensure alignment between the two pieces of work.
- 1.4 In commissioning the update, the Council are keen to understand: existing business needs; likely changes in the market; and how the local community needs are changing. In understanding these elements, the Council require the information provided through the ELR update to form the basis of recommendations that support the plan including:
- The need for land or floorspace for economic development, including both the quantitative and qualitative needs; and
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs.

Report Structure

1.5 The remainder of this report is structured as follows:

- **Section 2** – Baseline Review
- **Section 3** – Property Market Analysis
- **Section 4** – Review of Employment Land Supply
- **Section 5** – Forecasts and Scenarios of Future Employment Demand
- **Section 6** – Forecasts of Future Employment Land Demand
- **Section 7** – Comparison on Employment Land Demand and Supply; and
- **Section 8** – Conclusions.

2. Baseline Review

- 2.1 The first part of the baseline review highlights the key themes and recommendations coming from a number of key policy documents at the national, regional sub-regional and local levels that are of particular relevance to the study. The second part of the review identifies the key socio-economic characteristics of East Staffordshire, updated from the 2009 ELR, comparing local statistics with those at a national and regional scale.

Document Review

Planning Policy and Strategy

National Planning Policy Framework

- 2.2 The National Planning Policy Framework (NPPF), which sets out the Government's planning policies for England and how they are expected to be applied, was published in March 2012. The document replaces a number of documents in place previously including Planning Policy Statement (PPS) and Planning Policy Guidance (PPG) documents, including of specific relevance to this ELR update, Planning Policy Statement 4 (PPS4) *Planning for Sustainable Economic Growth*.
- 2.3 The NPPF states the purpose of the planning system is to contribute to the achievement of sustainable development, and establishes a presumption in favour of sustainable development.
- 2.4 'Building a strong, competitive economy' is a key priority area within NPPF, recognising the Government's commitment to securing economic growth in order to create jobs and prosperity, building on the country's inherent strengths, and to meeting the twin challenges of global competition and of a low carbon future.
- 2.5 In order to achieve economic growth, NPPF states that Local Planning Authorities (LPAs) should plan proactively to meet the development needs of business and support an economy fit for the 21st century. This includes:
- Setting out a clear economic vision and strategy for the area which positively and proactively encourages sustainable economic growth;
 - Setting criteria, or identifying sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
 - Supporting existing business sectors, taking account of whether they are expanding or contracting and, where possible, identifying and planning for new and emerging sectors likely to locate in the area. Policies should be flexible enough to

accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;

- Planning positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- Identifying priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- Facilitating flexible working practices such as the integration of residential and commercial uses within the same unit.

2.6 Importantly for the undertaking of this ELR update, NPPF states that policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of it being used for that purpose, including the need for regular reviews of sites, having regard to market signals.

2.7 The NPPF also introduces a duty for public bodies to cooperate on planning issues that cross administrative boundaries, including for strategic priorities such as economic development requirements and land supply.

The End of Regional Planning Policy

2.8 The enactment of the Localism and Decentralisation Bill in November 2011 marked the beginning of the end of the Regional Spatial Strategy (RSS). The Localism Act provides a legal foundation to the revocation of Regional Spatial Strategies (following a series of legal challenges from CALA Homes on the initial revocation of the regional tier of planning in June 2010).

2.9 The Act imposes a duty on local planning authorities to co-operate and provide constructive, active and ongoing engagement in decisions relating to sustainable development or strategic infrastructure. Authorities maintain their strategic responsibilities in setting Planning Policy which plans for future growth.

2.10 This will mark the end of employment targets and policy at the regional scale, further emphasising the importance of having an evidenced assessment of the level of employment land required within a local area or neighbourhood.

2.11 It is important for local authorities to provide a credible and robust evidence base to justify future employment requirements at a local level, which can be translated into policy, rather than being reliant on targets set out at a regional level.

2.12 The loss of RSS, and the abolition of the Regional Development Agency, Advantage West Midlands, emphasises the importance of having an evidenced and up-to-date ELR that is robust at both the local and the sub-regional scale and across all sectors in order to fit with the new economic development landscape including Local Enterprise

Partnerships (LEPs). Under this new LEP landscape, policy consistency, collaboration and decision making is likely to be driven forward at both the local and sub-regional scales.

Current Local Policy Framework

- 2.13 The principles of a plan-led system were established in PPS12 and are retained under the NPPF, but with a presumption in favour of sustainable development. The NPPF consistently references the need for clear policies based on local community and neighbourhood requirements and needs.
- 2.14 This includes the need to pro-actively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs, through the local planning process.
- 2.15 ELR's play a key role in establishing requirements for locally distinctive policy responses, in particular relating to the provision of a suitable portfolio of employment land and the creation of 'balanced economic markets'.
- 2.16 The statutory development plan at the local level currently comprises the East Staffordshire Borough Local Plan (2006).

Local Employment Land Requirements

- 2.17 Whilst the RSS set out the requirement for local authorities to identify a portfolio of employment sites, no figures were provided to determine the quantum of land required (this was part of the later un-adopted Phase 2 Revision), which was tested at EiP.
- 2.18 In the absence of any adopted regional targets, employment land requirements for East Staffordshire were taken from the Staffordshire Structure Plan (2001), which sets out a requirement for employment land in the County of 1,245ha from 2001 to 2011. This included a total of 250ha within East Staffordshire.
- 2.19 At the time of adoption of the Local Plan, the areas already developed and areas committed by planning permission were netted off this total requirement. As a result the following supply was identified:
- Completions totalling 97.68ha;
 - Commitments totalling 91.1ha;
 - Site allocations totalling 64.27ha.
- 2.20 The current position of employment land delivery in East Staffordshire is set out in the table below.

Table 2.1: Current Employment Land Position in East Staffordshire

Structure Plan Requirement 2001 – 2011	250ha
Completions 2001 – 2011	145.52ha
Sites under construction / with planning permission	8.4232ha ¹
Available sites	109.68ha
Remaining requirement	-13.623ha

Source: East Staffordshire Borough Council Local Plan, 2006; Staffordshire Structure Plan, 2001; East Staffordshire Borough Council Annual Monitoring Report, 2011; East Staffordshire Employment Topic Paper, July 2012

- 2.21 In reviewing the data presented above, it is clear that East Staffordshire has struggled in delivering its Structure Plan target of 250ha of employment land. Whilst there is a healthy quantum of available employment land identified, to date the borough has delivered less than 60% of the requirement set out in the Structure Plan.

Emerging Local Plan

- 2.22 The Core Strategy Issues and Options paper, consulted on from October 2007 to January 2008, proposed a potential strategy to have 50 hectares of immediately available employment land to be allocated within a 5-year rolling period. This figure was based on the Phase 2 RSS figures which went through examination. No further detail was presented to how this may affect land supply, in terms of the preferred location for economic development to take place across the borough.
- 2.23 The Core Strategy Draft Pre-Publication Strategic Options (2011) does not provide any further detail on the quantum of employment land required over the plan period beyond that stated in RSS including making provision for a rolling supply of 50 hectares of employment land in the first five years of the plan, with a further 150 hectares over the remainder of the plan period.
- 2.24 One of the proposed 'step change themes' is to deliver a more diverse, dynamic and high value economy over the plan period, with the following development objective identified, alongside others, to achieve the vision:
- Economic development, alongside the proposed housing growth, will have ensured that East Staffordshire and its urban centres remain competitive and have minimised the effects of outward commuting on the Borough's road and rail infrastructure. As well as investment in infrastructure and delivery of key development sites, there will be support for the workforce and business creation / expansion and inward investment across the Borough.

Annual Monitoring Reports

¹ NB: Based on available figures from East Staffordshire Council at the time of writing. Figure does not include conversion of existing premises or change of use.

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- 2.25 The review of the Annual Monitoring Reports from 2006/7 to 2010/11 presents an interesting picture of employment development across East Staffordshire. Initial completion rates, for the period 2006/7 to 2008/9 totalled 98.47 hectares, at an annual average of 32.8 hectares. However, these development rates dropped off significantly in 2009/10 and 2010/11 including completions totalling 1.095 hectares and 0.03 hectares respectively. The tail of off development rates post-2008 coincides with the challenging macro-economic climate during this period.
- 2.26 The 2010/11 Annual Monitoring Report suggested available employment land supply across East Staffordshire totalling 109.68 hectares, representing a five-year plus supply based on the completions noted between 2006/7 and 2010/11, but only a three-year supply based on the larger 2006/7 to 2008/9 completion figures.

Other Policy Drivers

- 2.27 Beside the statutory development plan and emerging planning documents, there are a number of other policy plans and projects that will influence demand for employment at the local level. These are discussed briefly below:

Local Enterprise Partnerships

- 2.28 The Localism Act replaced Regional Development Agencies (RDA's) (such as Advantage West Midlands) with Local Enterprise Partnerships (LEPs) by 2012. Since October 2010 the Government has announced the creation of 30 LEPs. East Staffordshire is recognised to be aligned with the Greater Birmingham and Solihull LEP (GBSLEP) but given its proximity it is also relevant to consider the Stoke-on-Trent and Staffordshire LEP, and the Derby (D2N2) LEP.
- 2.29 In February 2012 the collective members of the GBSLEP signed a planning charter that will help business in the area by enabling appropriate development rather than discourage it.
- 2.30 The charter lays out the intention of planning partners involved in the LEP to be proactive and supportive of business and investment whilst ensuring quality, sustainable and honest dialogue are at the heart of planning decisions.
- 2.31 The charter further states that whilst development must always be appropriate, the way local authorities communicate and work with business should be supportive of investment that delivers against both LEP and local priorities.
- 2.32 The 'Strategy for Growth' published by the GBSLEP in October 2012 focuses on the three pillars of business, people and place. Under these pillars the document outlines the key priorities that have to be tackled to deliver economic growth including:

- Creating a new eco-system for business support
- Providing clear leadership in growth sectors
- Reducing the skills deficit
- Supporting the development of vital employment land and housing
- Improving physical and digital connectivity

2.33 The Stoke on Trent and Staffordshire LEP Strategic Business Plan 2012-13 identifies six key priorities including the need to provide the right sites and infrastructure. Under this priority, the Business Plan makes the commitment to make sure that there are the right sites in place to attract new investment and to support existing businesses who wish to expand.

2.34 The sector focus identified by each of the LEPs provides important context for the forecast analysis within this ELR report. The table below summarises the key sector focus of each of the three LEPs respectively.

Table 2.2: Sector focus of LEPs

Gtr Birmingham & Solihull	Stoke on Trent & Staffs	D2N2
Automotive assembly	Advanced manufacturing and automotive	Transport equipment manufacturing
Low carbon R&D, transport and building	Medical & healthcare technologies	Medical / Bio-science
Business, professional and financial services	Professional services	Food & drink manufacturing
ICT	Ceramics	Construction
Creative and digital	Logistics & distribution	Visitor economy

2.35 The sector focus of the LEPs is relevant in the context of this ELR as in each case they are likely to inform the nature of sub-regional project and delivery priorities. This is particularly relevant in the current public funding landscape which is seeing a growing importance of LEPs in administering funds, and in supporting projects through national initiatives.

2.36 Delivery of economic development will of course take place outside of the confines of the sector prioritisation by the LEPs, however, taking the Gtr Birmingham & Solihull area as an example, the focus of office development is assumed for the Birmingham area with likely little impact on the secondary centres across the area, including Burton-upon-Trent.

Previous Employment Land Review Findings (2009)

2.37 The East Staffordshire Borough Council Employment Land Review was published in August 2009 and provides an assessment of employment land within the borough in terms of quality, quantity and the extent to which this land can meet the identified future requirements.

Employment Forecasts and Requirements

2.38 The 2009 ELR considered three alternative scenarios for growth for the period to 2020, including:

- Labour demand scenario utilising updated forecasts obtained from Cambridge Econometrics;
- Past trends taking account of historical rates of growth during the 1998 to 2007 period projected forward to 2020; and
- Labour supply scenario based on assumptions around potential population and force changes to 2020.

2.39 The analysis undertaken concluded that the labour supply scenario was the most plausible, heavily linked to delivery against housing growth point targets. The preferred scenario suggested the following requirements totalling 65ha:

- Additional 62,000sqm office (19ha)
- Additional 5,000sqm B2 (2ha)
- Additional 176,000sqm B8 (44ha).

Employment Land Supply

2.40 The ELR identified in excess of 123 hectares, suggesting sufficient land supply over the plan period compared to requirements. However, the qualitative assessment of the supply suggests issues with availability including concerns around ground conditions / flooding. In addition, the assessment noted a significant proportion of land identified in the draft Strategic Housing Land Availability Assessment (SHLAA).

2.41 The assessment of land supply concluded on this basis that there was only 41.2 hectares of employment land available for development and not affected by possible ground conditions, flood risk or change of use to residential. Further to this, of the land that is not affected by the above concerns, an insufficient amount of it is located in the key employment town of Burton.

Study Conclusions

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- 2.42 The study recommended that the Council should seek to identify additional, deliverable development sites with close proximity and access to the junctions with the A38 immediately to the south and north of Burton. According to the study, these sites should be a minimum of 2 to 6 hectares (dependent on the proposed use) and provide for at least 30 hectares of net developable land in total.

Adjacent Authorities Employment Land Position

- 2.43 It is relevant to consider the employment land position, both current and in terms of forward planning policy, of adjacent authority areas when considering the future position for East Staffordshire. This approach forms part of the Council's Duty to Cooperate, a requirement of the Localism Act.
- 2.44 Later analysis presented within this section supports the assumption that there is a strong interface between the economies of East Staffordshire, Lichfield, Derby and South Derbyshire. It is relevant to recognise the aspirations of these wider economies in employment land terms when establishing the aspiration for East Staffordshire. This is particularly true of where assumptions are being applied around future scales of commuting and employment growth.
- 2.45 Engagement has been undertaken with adjacent authorities as part of the preparation of this ELR update, including a round table workshop to discuss approach and emerging findings to ensure cross-border considerations have been taken into account.

Lichfield

- 2.46 The Lichfield District Local Plan Strategy (July 2012) sets out the authority's approach to employment and economic development over the plan period, drawing on the evidence developed as part of the preparation of the Lichfield Employment Land Review finalised in February 2012.
- 2.47 Core Policy 7 of the document sets out the detail of the approach to employment and economic development. It supports economic growth within Lichfield, and states a job growth estimate of between 7,310 and 9,000 jobs to achieve a job balance ratio of 85% by 2028. Referencing back to the ELR, this is referred to as the 'Policy-On Scenario 2'. The 'Policy-On' reference is to the assumption of the delivery of housing growth of 8,000 units over the plan period.
- 2.48 In order to achieve this level of job growth the Plan identifies the need to allocate 79.1 hectares of land for employment uses, with around 10 additional hectares of land to be defined by the Local Plan Allocations document to ensure flexibility of provision to serve Lichfield City specifically.

2.49 In the policy explanation text it is noted that many highly qualified and skilled residents currently commute out of Lichfield District to access employment appropriate to their needs and aspirations. It is envisaged that Policy 7 along with other Core Policies in the Local Plan document will assist in redressing the imbalance between out and in-commuting to and from the District, but not a level that will undermine urban renaissance and inward investment to the West Midlands conurbation.

Derby / South Derbyshire

2.50 The Derby and South Derbyshire authorities have been working closely with Amber Valley Borough Council to prepare separate but aligned Core Strategies, recognising the housing market and functional geographies that link these areas.

2.51 The approach to date within published documentation has focused largely on the scale and nature of housing growth envisaged across the three authorities. For example, within Derby it is envisaged that consultation for the preferred approach for major new housing development will commence from October 2013, allowing opportunity for comment before a full Core Strategy is developed for further consultation in 2014.

2.52 An ELR was prepared by BE Group in 2008 covering the Derby Housing Market Area (Amber Valley, Derby, South Derbyshire).

2.53 The ELR considered a number of alternative models to establish employment land requirements to 2026, including past take-up and econometric forecasting models. It does not identify a preferred model, but does criticise the pessimism of the Chelmar forecasting model applied within the East Midlands Land Provision Study (EMLPS) (2006). This forecasting model predicts only a marginal increase in B use class employment, albeit the figures are only presented to 2016.

2.54 The ELR concludes that broadly there is too much employment land in the Derby HMA. It suggests that over time poor quality land will have to be de-allocated or redeveloped for other uses, although alongside this new allocations will be needed to offer viable land and property solutions to modern, growing businesses.

2.55 Area specific commentary provided includes:

Amber Valley

- Relatively insular property market, addressing local needs;
- Limited office market alongside increasing demand for distribution uses, spreading west from the M1, focused on Alfreton;

- Issues with the quality of the land supply, specifically a shortage of available, immediately developable land in attractive locations.

Derby

- Traditional reliance on advanced engineering industries resulting in large swathes of manufacturing land;
- Lack of investment in city centre resulting in poor quality stock of offices, although off-set by success of Pride Park;
- Most oversupplied area of the three but its land resource is considered to be above average and fit-for-purpose.

South Derbyshire

- Similarly to Amber Valley, South Derbyshire is noted to have a primarily local market albeit with some strategic footloose inward investment and distribution demand along the A50 and A38 corridors;
- Much of the demand is focused on the key centre of Swadlincote, following successful regeneration investment;
- Slight undersupply of employment land generally.

Derbyshire Dales / High Peak

- 2.56 The Derbyshire Dales / High Peak joint ELR identifies a sub-regional land requirement of 56ha over the plan period, breaking down to a requirement of 16ha within the Derbyshire Dales (outside of the National Park), 35ha in the High Peak (outside of the National Park), and 5ha in the National Park. This demand requirement is identified within the ELR to be aspirational and ambitious given relatively low historic take-up and the current economic climate, and will require intervention to be delivered.
- 2.57 The ELR identifies an oversupply of employment land against this demand requirement, including specifically within industrial land supply. The industrial heritage of the area is noted to result in a number of available redundant industrial sites across the sub-region which are located in inappropriate locations for current market requirements. The ELR suggests that provision of office spaces and premises for start-up or creative industries and knowledge-based businesses should be focused around the sub-regions key settlements.

Assessment of Household Growth Options

- 2.58 The Strategic Housing Market Assessment (SHMA) for East Staffordshire was completed in July 2012 and a review was undertaken in Spring 2013 in order to take into account new demographic and economic information available. The SHMA Review is also fully

aligned with the Employment Land Review Update, with particular reference to the preferred employment scenario, the projected number of jobs over the Local Plan period and the resultant labour force requirements.

- 2.59 The SHMA includes a series of scenarios projecting population and household change over the Local Plan period. It is recommended in the SHMA that East Staffordshire should plan to meet its demographically driven housing demand and should also look to meet economically derived housing demand resulting from consideration of the aligned economic evidence base in the Employment Land Review. This suggests planning for a housing requirement that is aligned to population Scenario 2 which is entitled "Employment Led (ELR)". This scenario takes into account both demographic and economic evidence, and the increasing labour force requirement associated with the delivery of new jobs.
- 2.60 The SHMA also acknowledges publication of the 2011-based Interim Sub National Household Projection dataset subsequent to the scenario work being undertaken. The interim 2011-based projection does indicate a potential reduction in household formation from the rates projected by the earlier 2008-based Sub National Household Projection. The SHMA states that it would therefore be prudent to take some account of the implications of a reduced propensity for household formation over the plan period.
- 2.61 Making an allowance for a reduced propensity for household formation, the SHMA projects that 11,875 households could form by 2031. Translating this into an annual housing requirement equates to 613 dwellings per annum (11,648 dwellings over the period 2012-2031).
- 2.62 The SHMA report recognises the importance of Burton-upon-Trent and Uttoxeter as established settlements which will continue to make positive contributions to balancing the supply and demand factors operating in the housing market.

Baseline Economic Analysis

Population

- 2.63 Population change over time in East Staffordshire is considered in some detail in the SHMA, including analysis of drivers of change (natural change, internal migration, international migration). Summary information relating to changes in the resident population is provided below.
- 2.64 According to the Office of National Statistics (ONS) the population of East Staffordshire has grown from approximately 103,900 people in 2001 (ONS Mid Year Estimate) to 113,900 in 2011 (ONS Mid Year Estimate), an increase of approximately 10,000 people

over the ten years. This translates into approximately 1,000 people per year on average over this period.

- 2.65 Over the 10 years between the two census points the population of East Staffordshire has increased proportionately in the 60 years + age groups and the group aged 20 to 30 years. The proportions of population aged 5 to 15 years and 30 to 40 years has declined over the period 2001-2010.
- 2.66 The SHMA profiles the component of population change, considering natural change (the balance between births and deaths) as well as UK based migration and international migration. Natural change has continued, year on year, to result in a positive increase to the population of East Staffordshire. The scale of the net level of population change associated with this component has increased to represent over 400 extra people per year since 2007/08².
- 2.67 Migration has also played a role in increasing the Borough's population every year. Particularly high levels of migration were evidenced in 2006/07 and 2007/08 as well as in the year 2001/02. The high levels of migration in 2006-2008 reflect a period of strong national economic performance, immigration from EU accession countries, comparatively strong levels of housing completions in East Staffordshire

Employment

Overall Growth

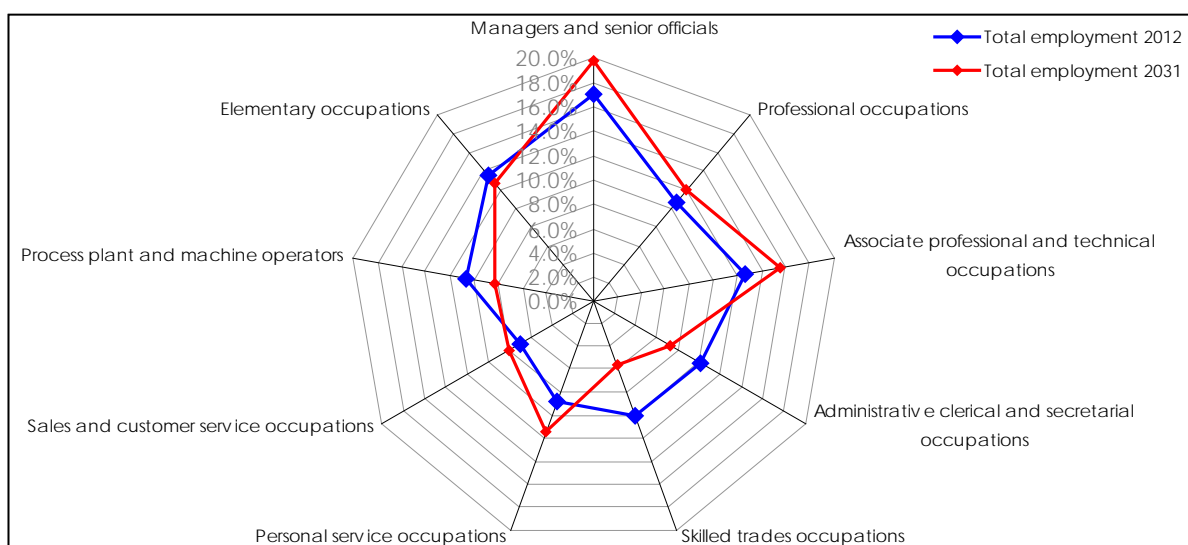
- 2.68 Data obtained from the Cambridge Econometrics Local Econometrics Forecasting Model (CE LEFM) indicates that East Staffordshire currently provides around 61,600 jobs (2012), representing a reduction of around 4,300 since the peak in 2005. The model provides local authority specific employment projects to 2031 (base date 2012). It predicts employment growth across East Staffordshire of 13,400 new jobs (21.8%) from 2012 to 2026.
- 2.69 This level of employment growth is significant, especially when it is considered that the model is "policy-off" and has not been subjected to local testing at any time. Below, we have used the CE data to illustrate a number of key issues related to the structure of East Staffordshire's economy, and how it could change in the future.

Employment Structure

² Note: This net level was driven by 1,433 births and 1,004 deaths recorded in the authority in 2010. The levels of births are estimated to have increased over the last nine years although the number of deaths has remained relatively constant at between 1,002 in 2007/08 and 1,126 in 2001/02.

- 2.70 The employment structure of East Staffordshire is shown in the figure below. The figure shows that in 2012, the occupational structure of the East Staffordshire economy was relatively balanced, albeit with a higher proportion of people employed as Managers and Senior Officials than other occupations. The forecast figures suggest a more pronounced skew towards Managers and Senior Officials by 2031, with an increasing importance of Associate Professional and Technical Occupations,
- 2.71 By 2031 there is noted to be a forecast contraction in employment within a number of occupations including: Elementary Occupations, Process, Plant and Machine Operatives, Skilled Trades Occupations, and Administrative Clerical and Secretarial Occupations.
- 2.72 It will be important for this update to the ELR to consider what the changing occupational structure of East Staffordshire will bring with it, including changing demands for different types of employment space. For example, declining employment in process and less skilled occupations is aligned with a reducing demand for manufacturing type space, with implications for existing employment premises and future development activity.

Figure 2.1 Occupational Structure in East Staffordshire: 2012 and 2031



Source: Cambridge Econometrics 2012, GVA analysis 2012

Employment Sectors

- 2.73 The distribution of employment across nine key sectors in East Staffordshire is shown in the figure below, using data from Cambridge Econometrics. According to the data, which as already noted is "policy off" and therefore does not take into account local

aspirations; East Staffordshire is predicted to witness significant growth in only one sector – Financial and Business Services between 2012 and 2031.

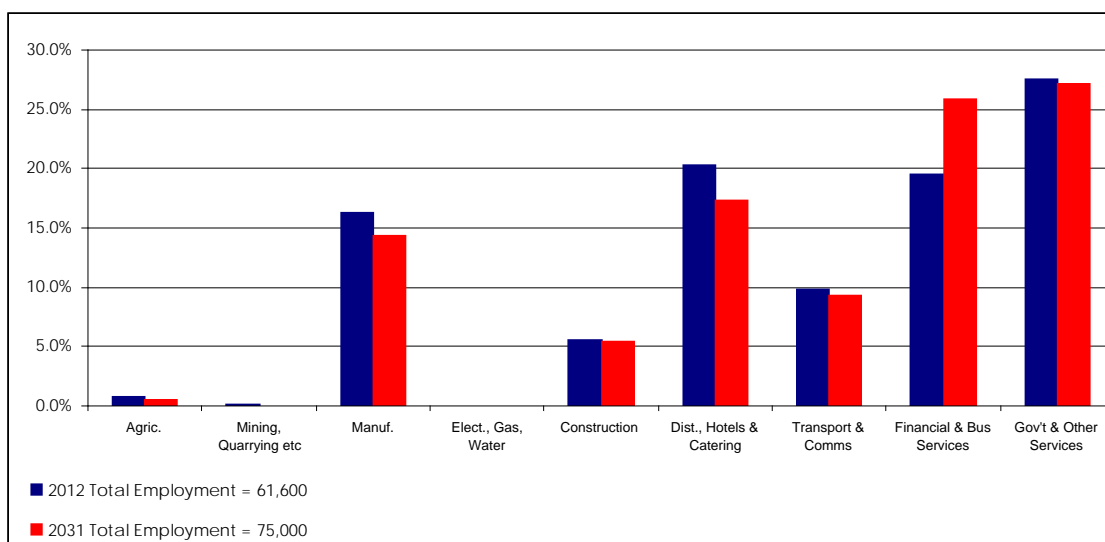
2.74 Despite a decline of around 0.5% over the period, the public sector is forecast to remain the largest employer in the borough, albeit by less than 2% above the Financial and Business Services.

2.75 This coupled with the predicted decline in employment in sectors including transport, communications, distribution and manufacturing suggests an increasing demand for office accommodation alongside a decline in demand for industrial and distribution units, based purely on the baseline econometric forecast.

2.76 Despite this, it should be noted that these projections are produced using regional scale data and do not take into account local interventions and priorities. Further, the manufacturing supply chains play a key role in supporting the sector within the borough. Any future development of this sector, including high value but often low employment contribution to the economy, will need to be facilitated through appropriate accommodation to facilitate growth / expansion. Manufacturing will still represent just under 15% of employment within the economy.

2.77 Importantly this analysis does not include consideration of Non-B Use Class employment activity such as that within the tourism sector including hotels and catering activity.

Figure 2.2 Employment Sectors in East Staffordshire: 2012 and 2031

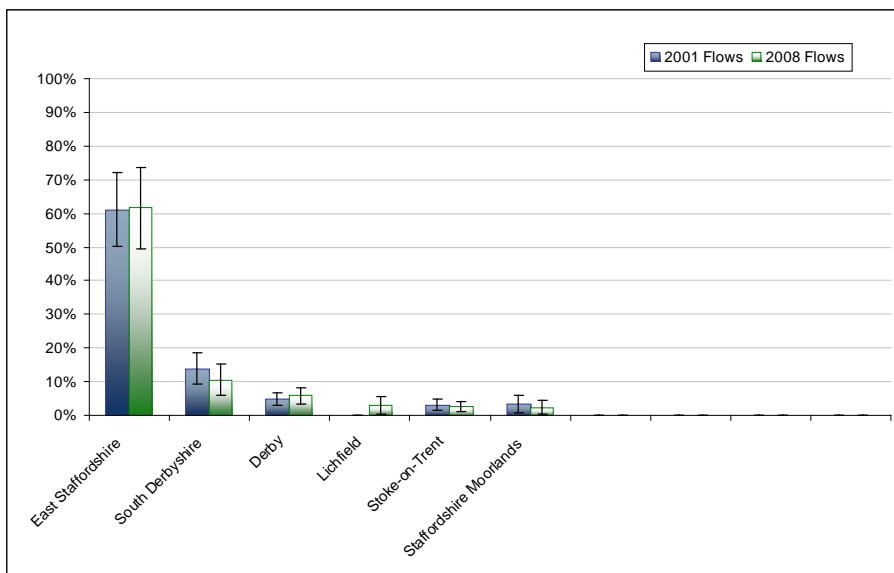


Source: Cambridge Econometrics 2012, GVA analysis 2012

Commuting

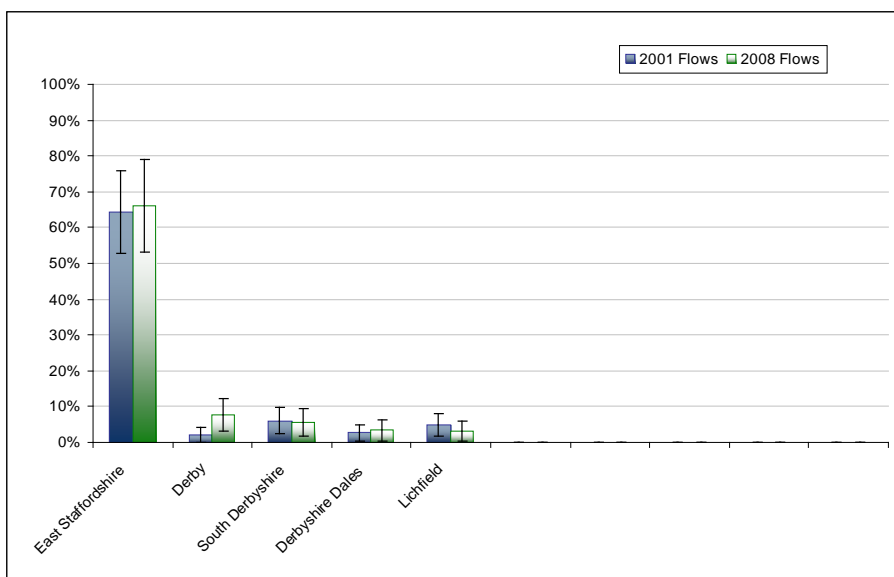
- 2.78 Comparing Census 2001 data on employment with the Cambridge Econometrics data on total number of jobs in East Staffordshire in the same year suggests that East Staffordshire is a net importer of labour. The 2001 Census suggested total people living in East Staffordshire and working (part time, full time, self employed) stood at 46,997, whilst Cambridge suggest total jobs in the East Staffordshire economy in 2001 stood at 57,600.
- 2.79 This supports the importance of engagement with adjacent authorities as part of the production of this ELR update as delivering economic development within East Staffordshire has employment implications for other authority areas. The historic reliance on in-commuting also supports housing delivery locally to retain the benefits of employment opportunities generated within East Staffordshire.
- 2.80 The figures below compare 2001 Census data on commuting with data taken from the Annual Population Survey in 2008. The top flows of daily commuters are shown on the figures.
- 2.81 The data confirms that just over 60% of residents of East Staffordshire work within the borough, albeit that figure is higher than that recorded in 2001. This suggests that employment opportunities in nearby economic centres are important, including a growing significance of Derby in this context.

Figure 2.3 Local Authority of Residence for East Staffordshire Workers 2001 vs 2008



Source: Census 2001 / Annual Population Survey 2008

Figure 2.4 Local Authority of Employment for East Staffordshire Residents 2001 vs 2008

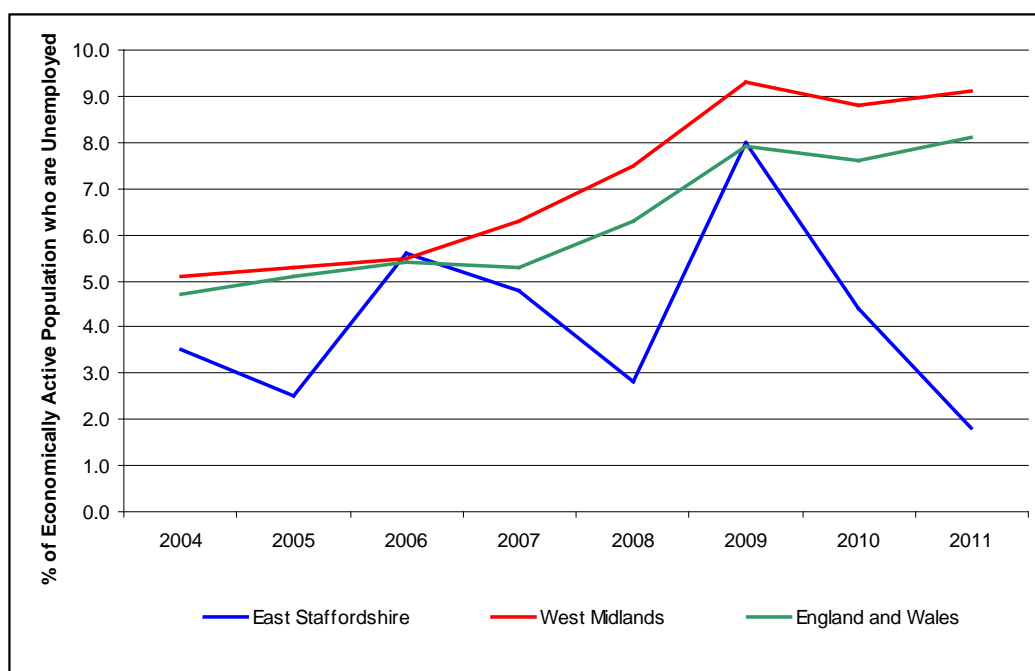


Source: Census 2001 / Annual Population Survey 2008

Unemployment

- 2.82 The unemployment rate in East Staffordshire has consistently been below that of the region and England and Wales over the period 2004 to 2012, with the exception of 2006 and 2009 (in the case of the latter it was marginally higher than the regional average but remained below the national).
- 2.83 The trajectory of the local unemployment rate over the period is seen to be more fluctuating. Unemployment peaked in 2009, although at 8% it remained significantly below the 9.3% recorded at the England and Wales scale.
- 2.84 Although the unemployment rate in East Staffordshire has remained below the wider averages for the majority of the period the fluctuations noted suggest a degree of vulnerability in the local economy. These figures relate to resident based employment (i.e. people that live in East Staffordshire) and therefore could be a result of changes in business base within neighbouring authorities.

Figure 2.4 Rate of Unemployment: 2004 – 2012



Source: Annual Population Survey 2012, GVA Analysis 2012

2.85 Clearly, whilst unemployment overall has generally been below the national and regional averages, there are issues with the proportion of young people who are out of work in the borough. The generation of local employment opportunities, facilitated in part through the supply of good quality available employment land, will be an important factor in reducing youth unemployment over the plan period.

Earnings

2.86 In 2011, average weekly earnings for residents of East Staffordshire were £475.60, which is above the regional average of £470.50 but below the national average of £504. In terms of the workplace population, average earnings in 2011 for East Staffordshire were £479.10, below the regional average of £470.60 and the national average of £503.60.

Gross Value Added (GVA)

2.87 Gross Value Added (GVA) is a measure of the productivity of the economy, and when considered in the context of total employment, is a measure of the productivity of each job within the economy.

2.88 GVA per job in East Staffordshire in 2012 (at 2006 prices) stood at £34,131, compared to £34,576 across the West Midlands and £38,106 across the UK. In each case this figure is projected to increase to 2031, suggesting increased productivity across all of the

economies, albeit the growth in East Staffordshire, at 43.3% (to £48,914) is below that of West Midlands at 43.6% (to £49,654) and the UK at 48% (to £56,400).

- 2.89 Significant contributions to existing GVA across East Staffordshire include from the following sectors: Food, Drink and Tobacco, Mechanical Engineering, Construction, Distribution, Retail, Land Transport, Communications, Professional Services, Education, and Health and Social Work.

Business Consultation

- 2.90 In line with the requirements of the NPPF, this ELR Update has included consultation with businesses across East Staffordshire.
- 2.91 Working alongside the Economic Regeneration team within the Council, major local businesses were identified and invited to a workshop to discuss the ELR approach and emerging findings. In response to low take-up for this event, a further means of engaging with the local business community in the form of an on-line survey was undertaken. The survey was distributed to 121 businesses and umbrella organisations across East Staffordshire. In addition the survey was sent to the Burton Chamber of Commerce who sent it out to all of their members.
- 2.92 Only 11 businesses responded to the survey, meaning that the results cannot be considered to be representative of the wider economy, although it is noted that the responses included businesses within the services and manufacturing sectors, and included some of largest employers within the district.
- 2.93 The general responses received from the survey are summarised in the remainder of this section. Given the small number of responses received it is not considered robust to present figures from the survey as proportions or as wholly representative of the wider business base.

Nature of Business

- 2.94 Of the businesses responding to the survey, three were manufacturing, three were real estate, renting and business activity, two were other community, social and personal service activities, one was public administration and defence, and one was transport, storage and distribution. Further to these responses, two of the businesses noted that they are pharmaceutical and pharmaceutical supplier activities.
- 2.95 A total of nine of the respondents stated that they are limited companies, with five of the respondents stating that their operation in East Staffordshire is Head Office, and a further two stating they are independent.

Location in East Staffordshire

- 2.96 Only one of the businesses has been located in East Staffordshire for less than 2 years, with the rest ranging from 8 years to over 50 years. Only one of the respondents stated that they had relocated from elsewhere, with the rest stating that they had relocated from within East Staffordshire, that their operation is their first premises, or is a new branch/plant.
- 2.97 Three of the respondents stated that they had considered locating their business elsewhere, citing the consideration of anywhere within the Burton catchment area, East Anglia, or UK wide as alternatives respectively.
- 2.98 In terms of why East Staffordshire was identified as the best place to locate the business, the following reasons were noted. The number in the brackets represents the number of responses which stated the reason. More than one reason could be given by each respondent.
- Location of clients / business supply chains (3)
 - Location relative to road network / accessibility (3)
 - Knowledge of the area (2)
 - Quality of the labour supply (1)
 - Local to the owners (1)
 - Local to the raw materials (1)
 - Local economy (1)
 - Local to original premises (1)
 - Cost (1)

Existing Premises

- 2.99 Of the respondents, seven have no plans to move from their current premises, one is actively looking to relocate (within East Staffordshire), and three do not currently know.

Employment

- 2.100 The sizes of the businesses responding to the survey ranges from 3 to 25,000 (with the latter relating to total employment rather than that specifically within East Staffordshire). The smaller local range is from 3 to 1,000 employees.

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- 2.101 Three of the respondents noted that between 76 and 100% of their employees live within East Staffordshire, with a further four noting between 51 and 75%. Only one business estimated less than 25% of its workforce living in the area.
- 2.102 There is a good spread of occupation noted across the respondents, with people employed at all occupational levels. The largest proportion of employment is noted within Managerial and Senior Official (64%), Professional (55%), Administrative and Secretarial (82%), and Sales & Customer Service (55%) occupations.
- 2.103 The majority of the respondents, seven of the businesses, do not work on a shift basis.
- 2.104 Three of the businesses are looking to increase their current workforce, with a further three uncertain at the current time. Of those looking to expand workforce, the majority is envisaged within the next 24 months including 65 of the 85 jobs envisaged to be created over the next five years.

General Considerations

- 2.105 When asked about expectations of changes to business size over the next five years, only one of the respondents envisage getting smaller, with five suggesting moderate growth and four uncertain.
- 2.106 The businesses were asked to identify the most important issue facing them at the current time, with the following responses noted:
- The UK economy (2);
 - Raw material supply / prices (2);
 - Planning policy adoption, including Infrastructure Delivery Plan (1);
 - Lack of available commercial buildings (1);
 - Legislation for flexible workers (1);
 - Sales / consumer confidence (2); and
 - Cash availability.

Conclusions

- 2.107 As noted previously, the scale of the response to the business survey means that it is not possible to draw conclusions that are representative of the wider business base across East Staffordshire.
- 2.108 However, some observations can be drawn from the survey which is of interest to the ELR. This includes the loyalty evident within the businesses captured including the length

of time businesses have been located in the area following their establishment, and the attractiveness of the area as a place to do business based on access to markets and labour force due to its road infrastructure and connectivity.

3. Property Market Analysis

Introduction

3.1 In this section of the report, we provide an overview of the industrial/ distribution, office and retail/ leisure property markets within the Borough in line with the previous ELR. For each market we examine the following topics:

- The key locations, quality of existing stock, new build and pipeline development;
- Occupational market conditions, including leasehold and freehold values; available properties, market competition and consideration of take up rates for office and industrial uses;
- Investment market conditions, including analysis of investment yields and investor demand; and
- The market for development land.

3.2 This section concludes with a summary of the main characteristics of the Borough's commercial property market.

3.3 The following paragraphs discuss the industrial/ distribution market in the Borough.

Industrial/ Distribution Market

Key Locations

3.4 This section highlights key locations and discusses the industrial/ distribution market conditions. The Borough is well located adjacent to the A50 (dual carriageway) linking it with the M1 and M6 and the A38 linking north Birmingham with the East Midlands. The Borough is therefore well placed to serve the regional and national industrial/ distribution markets. In particular, Burton Upon Trent and its industrial parks (in particular Centrum 100/ Centre 38) are considered to be of regional importance.

3.5 Prime locations for distribution in the West Midlands region are the M6 motorway from Junction 1 (Rugby) to Junction 15 (Stoke), the M6 Toll road (Coleshill to Cannock), M42/ A42 (Redditch to Ashby de la Zouch) and the A38 (north of Birmingham to Burton upon Trent).

Centrum East and West, Burton Upon Trent

- 3.6 Centrum is situated within the south of the study area fronting the A38. The site has excellent access to the A38 (linking Birmingham with the East Midlands) which provides access to the A50 and the region's motorways (M6 Toll, M6, M1, M42 and M40).
- 3.7 Centrum is accessed from the A38 and is considered the main industrial/ distribution location in East Staffordshire. The site includes 80 ha (200 acres) of warehousing, industrial, office and business support facilities. A total of 22.26 ha (55 acres) of the site remains available for development.
- 3.8 It comprises mainly industrial/ distribution accommodation (Use Class B2/ B8). However there are a number of office developments on the site, in addition to retail and leisure uses including a local gym, hotel and pub. The industrial and distribution units are typically of modern steel portal frame construction with profile metal cladding to the walls and roofs. Key occupiers located at Centrum 100 include a 400,000 sq ft Boots distribution warehouse, Palletforce, Unipart Logistics, Marstons, Scania, Hobby Craft and Coors.
- 3.9 Currently there is 213,240 sq ft of industrial/ distribution warehouse available at Centrum 100. The site also contains future development land which is currently being marketed including a site which benefits from planning permission to provide a 415,000 sq ft B8 industrial/ distribution facility.

Centre 38, Barton-under- Needwood

- 3.10 Centre 38 is located adjacent to the A38, approximately 4 miles to the south of Burton Upon Trent. The site has easy access to the region's motorways including the M6 Toll, M6, M1, M42 and M40. The 30.4 hectare (75 acre) park provides 7 B2/ B8 units which range in size from 30,000 sq ft to 638,000 sq ft. The Park caters for large national occupiers, with key occupiers including Argos, Pirelli, Intier and Bombardier.
- 3.11 Centre 38 has one remaining plot which is currently being marketed by St Mowden for a Design and Build opportunity. The 6.33 acre site, which benefits from planning permission, will accommodate a new unit of up to 110,000 sq ft.

Pirelli Factory, Derby Road, Burton Upon Trent

- 3.12 Derby Road in Burton upon Trent has become the focus of a new residential, leisure and commercial development situated around the existing Pirelli tyre factory and head office. The 30 acre site is located in close proximity to the centre of Burton upon Trent and comprises two separate sites. The commercial employment buildings proposed as part of the scheme will be focused on the site situated to the east of the Pirelli factory. In particular the site will provide court yard offices and a light industrial warehouse units.

The employment component of the future development will front Derby Road, with access just off it. The site is noted to have good links to the A38.

3.13 There are a number of other smaller industrial developments located throughout the study area, most of which are focussed around the Burton and Uttoxeter area, as set out below:

- **Great Northern Business Park, Hawkins Lane, Burton:** A number of smaller industrial estates are located within the Great Northern Business Park in the centre of Burton Upon Trent, including Burton Enterprise Park, Windsor Industrial Estate, Paramount Works, the Manor Industrial Estate and the Sovereign Business Park. Predominately these industrial estates comprise older properties which may require refurbishment. The majority of units are steel portal frame construction, with brick/ blockwork to the lower elevations and asbestos pitched and steel pitched roofs. The units mainly cater for local companies; however a number of national firms are also based here, including Speedy Hire, Plumb Base and GE.
- **Dale Street/ Moor Street, Burton:** The Dale Street/ Moor Street employment area is located in the centre of Burton upon Trent and provides small industrial and manufacturing units. Predominately the units are of brick construction with pitched asbestos roofs and many appear to require refurbishment. The estate primarily caters for local occupiers who require a small quantum of floorspace.
- **IMEX Business Park, Burton:** The IMEX Business Park is located on the A5189 in the centre of Burton. The former Allied Breweries Bottling Plant has been refurbished to provide a mixture of warehouse, light industrial and office accommodation. Available units range in size from 145 to 4,500 sq ft.
- **Stretton Park, Burton on Trent:** Stretton Business Park is located in Stretton adjacent to the A38, approximately 2.5 miles to the north of Burton town centre. The Stretton Business Park comprises steel portal frame construction, with brick/ blockwork to the lower elevations and steel pitched roofs. The Industrial Estate caters for local occupiers. One development plot remains available at this site.
- **Lancaster Park, Needwood:** Lancaster Park in Needwood is situated approximately 5 miles to the west of Burton Upon Trent town centre. The occupiers are mainly local firms; however a number of larger companies are located here including GE and Activia Healthcare.
- **Fauld Industrial Estate:** The Fauld Industrial Estate is located 2 miles west of Tutbury, five miles from Burton upon Trent and four miles from the A50 which provides access to the M1 and M6 motorways. The majority of units are steel portal frame construction, with brick/ blockwork to the lower elevations and asbestos pitched and steel pitched roofs. The Industrial Estate caters for local occupiers.

- **Marchington Industrial Estate, Draycott in the Clay:** The Marchington Industrial Estate offers 1.3 million sq ft of industrial/ warehousing in 34 buildings which range in size from 300 sq ft to 645,000 sq ft. There is a design and build opportunity for a further 193,000 sq ft of industrial/ distribution space. The units are predominately of a steel portal construction with steel pitched roofs. The Industrial Estate is located approximately 3.5 miles from the A50 which provides the site with good access to the region's motorways.
- **Dovefields, Uttoxeter:** Dovefields Industrial Estate is located adjacent to the centre of Uttoxeter and approximately 7 miles from the A50, providing the Estate with access to the region's motorway network. In addition to providing industrial accommodation, Dovefields includes retail, leisure and office space.
- **Bramshall, Uttoxeter:** Bramshall Industrial Estate is located in the village of Bramshall, situated 2 miles to the west of Uttoxeter and 5.5 miles from the A50. The Bramshall Industrial Estate contains a number of industrial/ warehouse units which are predominately of steel portal construction. The Industrial Estate caters for local businesses.

Office Market

- 3.14 The West Midlands regional office market is dominated by Birmingham city centre, with all other locations considered secondary. Burton upon Trent is considered to be on a par with Tamworth, Lichfield, Cannock and Sutton Coldfield in this context and therefore competes with these smaller town and city centre locations.
- 3.15 There is little office accommodation of significance in the Borough. Anecdotal evidence has suggested that the office market in East Staffordshire caters for the local market, with demand focused on units sized between 2,000 to 3,000 sq ft.
- 3.16 Office development has been limited in the Borough, even before the economic downturn, due to weak demand. However there has been office development at Centrum 100, in particular the Farraday Court development, and Waterside Court development, owned by Staffordshire County Council. In addition a limited amount of office development has occurred within Burton town centre, with key developments including Anson Court and the Imex Building.

Retail Market

- 3.17 Burton upon Trent town centre is the primary retail centre in the Borough. It is classified by PROMIS as a 'Major Town', with an estimated shopping population catchment of 141,000. Burton upon Trent was listed as being 12th (out of 25) in the list of strategic retail centred in the West Midlands, according to the West Midlands Retail hierarchy.

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- 3.18 Additionally the town centre is projected to see above average growth over the period 2011 to 2016. The catchment population is classified by PROMIS as moderately affluent, with per capita retail spending levels comparable with the PROMIS average.
- 3.19 A review of the key locations of retail accommodation and leisure facilities within East Staffordshire is provided below.

Key Locations

Burton Upon Trent Town Centre

- 3.20 Retail floorspace in Burton Upon Trent is estimated at 0.96 million sq ft which is comparable with the PROMIS Major Town average. The primary retail area within the town is the Coopers Square Shopping Centre comprises a covered shopping centre with around 312,000 sq ft of gross floorspace. The Centre is owned by F&C Reit who recently acquired the site from Grosvenor who intended to extend the centre. Key occupiers within the Coopers Square Shopping Centre include BHS, Boots, Primark, Marks and Spencer's, New Look, WH Smith, B & M and HMV. The Octagon Centre and the Burton Place shopping centre comprise the secondary retail areas and include key retailers such as Costa Coffee, Dorothy Perkins, Iceland and TK Maxx. The town centre also contains a large number of small independent retailers.

Out of Town Retail

- 3.21 Middleway Retail Park is situated in close proximity of the A511, adjacent to Burton town centre. Key occupiers include Carphone Warehouse, Dreams, Matalan and Mecca Bingo. Dovefields Retail Park is located to the east of Uttoxeter town centre and is the Borough's primary retail and leisure park. The development comprises a number of retail premises of modern steel portal frame construction ranging in size from 100 to 10,000 sq ft. Key occupiers include Tesco, B&Q, Frankie and Benny's, KFC, Cinebowl, Pets at Home and B&M Bargains.
- 3.22 There are a number of instances of out of town retail within existing industrial estates within the Borough, most notable within Centrum 100 which has seen the development of a Morrisons, Currys/ PC World, McDonalds and Carpet Right. In addition the Borough's industrial estates contain a number of trade counters. From GVA's experience of undertaking numerous employment land reviews across the West Midlands, industrial estates will always be an attractive location for such trade counter uses from an occupier perspective, given the potential for on site car parking and larger floor plates than are available in city or town centre locations. It will be important that losses of employment land to Non B uses, such as trade counter uses and car showrooms are monitored closely by East Staffordshire Borough Council in order that sufficient provision can be made for employment uses in the B use classes.

Occupational Market Conditions

- 3.23 The occupier market is one key factor affecting the development viability of commercial uses.
- 3.24 The RICS Commercial Market Survey Q1 2012 states that occupier demand for space broadly stabilised in Q1 2012, with occupiers remaining cautious with regards to new letting activity. At sector level, demand for space fell in the retail sector, while it stabilised for offices and increased for industrial space. The West Midlands market has followed these national trends, stabilising following a down turn in 2011. Gradually the supply of good quality office and industrial space is reducing as space is becoming occupied and there is very little development activity.
- 3.25 The GVA Economic and Property Market Review Q3 2012 reports that the economic backdrop remains challenging for occupiers, but there are some positive trends for occupational demand. The recent robust numbers for employment growth and some mildly encouraging retail sales figures are good examples. Overall office take-up has held steady during Q1 and Q2 2012.
- 3.26 The sharp fall in overall UK construction activity in Q2 highlights the weakness of the development sector, and the level of new construction orders for commercial property remains historically low. Although very little development is coming on stream outside of central London, subdued occupier demand means that vacancy rates are still rising across many UK markets.
- 3.27 GVA forecasts for the occupier market anticipate almost no change to all property average rental values in 2012 and in 2013. Away from central London, it is forecast that rental values will still be below their 2008 peak at the end of 2016, and only around 6% higher than current levels. The low level of development activity means that the supply of high quality space is already diminishing. As economic recovery gets a firmer footing in the second half of our five-year forecast period, the demand for quality space will increase. Other factors will add to supply pressures and are storing up a future market imbalance. The high number of lease expiries, the looming April 2018 deadline after which it will probably not be possible to lease a building with an EPC rating below 'E', and the need for retailers to adapt their offer in a world increasingly influenced by internet sales are just three reasons why demand for prime space will rise significantly as the UK emerges from recession. As the gap between London, the South East, and the rest of the UK continues to widen, the market will become increasingly segmented, both by location and asset quality.
- 3.28 The local industrial market in East Staffordshire has demonstrated relatively good levels of take up over recent years, with strong take up particularly in the distribution sector, reflecting the national growth of distribution sector. Take up has come from local and

national companies, with national companies focusing on the Burton area. However, the local office market and remains subdued.

Industrial and Office Rental Values

- 3.29 GVA industrial agents report that prime industrial rents are in the order of £59.00 per sq m (£5.50 per sq ft) for new accommodation in the Burton upon Trent area and £56.00 per sq m (£5.25 per sq ft) in the Uttoxeter area. Asking rental values are often above these levels (see Table 3.1), however it should be noted that these are asking rental values and not necessarily symptomatic of the achieved rental values in the Borough.
- 3.30 The prime rent achievable largely depends upon the specification and size of the units. As with land values, pressure is still being applied to rents given the current economic conditions, as occupiers are re-considering (and sometimes postponing) their property requirements in light of current market conditions and the protracted nature of economic recovery. It should be noted that the majority of industrial accommodation in the study area is classified as secondary accommodation, with a limited amount of new build development present.

Retail Rental Values

- 3.31 PROMIS indicates that prime retail 'Zone A' rents in Burton upon Trent are approximately £95 psf at mid 2012. This represents no change on the end 2011 Zone A rental levels in the town. This rental value is consistent with the PROMIS average for similar sized Cities/Towns. Reported retail requirements are low for a town of its size and status, with 7 reported requirements for Burton upon Trent, against an average of 14. Burton upon Trent appears to be a stable town centre, however the lack of occupier demand could potentially threaten this stability.

Recent Transactions

- 3.32 Desk top research utilising the Focus database concludes that, over the last two years (from September 2010 to September 2012), approximately 144 industrial deals were completed in the Borough, totalling 1,063,345 sq ft (98,785 sq m). This equates to an average take up per year of 531,673 sq ft (49,392 sq m). Around 104 of these transactions (72%) involved small industrial premises (<5,000 sq ft/ <464 sq m). However 6 transactions related to premises over 35,000 sq ft (3,252 sq m), with 3 of these equating to deals over 100,000 sq ft (9,290 sq m).
- 3.33 Table 3.1 below highlights 10 of the most recent (known) industrial transactions in the study area (where information is available).

Table 3.1: Industrial Market Recent Transactions

Building	Type/ Quality of Stock	Size SqM	Achieved Rent	Transaction Date
82 Horninglow Street, Burton Upon Trent, DE14 1PN	Light Industrial (Second Hand)	65 sq m (702 sq ft)	£70.50/ sq m (£6.55/ sq ft)	09/07/2012
Unit E3-E5 Sovereign Business Park, Burton Upon Trent, DE14 1PD	General Industrial (Second Hand)	530 sq m (5,700 sq ft)	£42.41/ sq m (£3.94/ sq ft)	03/07/2012
Rolleston Lane, Burton Upon Trent, DE13 9HE	Warehousing (Second Hand)	212 sq m (2,284 sq ft)	£32.94/ sq m (£3.06/ sq ft)	30/05/2012
Unit 8 Crown Industrial Estate, Burton Upon Trent, DE14 3NX	Industrial/ Warehouse (Second Hand)	700 sq m (7,533 sq ft)	£51.45/ sq m (£4.78/ sq ft)	09/05/2012
Unit 152-152b Fauld Industrial Estate, Tutbury, DE13 9HS	Industrial/ Warehouse (Second Hand)	58 sq m (626 sq ft)	£62.54/ sq m (£5.81/ sq ft)	01/05/2012
Imex Business Park, Burton Upon Trent, DE14 2AU	Industrial/ Warehouse (Second Hand)	93 sq m (1,000 sq ft)	£32.29/ sq m (£3.00/ sq ft)	26/04/2012
Unit 1-2 Eccleshall Business Park, Burton Upon Trent, DE14 1PT	Industrial/ Warehouse (Second Hand)	145 sq m (1,559 sq ft)	£58.66/ sq m (£5.45/ sq ft)	29/02/2012
Arch 1-23 Railway Arches, Station Street, Burton Upon Trent, DE14 1BX	Industrial/ Warehouse (Second Hand)	66 sq m (709 sq ft)	£48.98/ sq m (£4.55/ sq ft)	24/02/2012
Unit 1-5 Wharf Road Industrial Estate, Burton Upon Trent, DE14 1PZ	General Industrial (Second Hand)	311 sq m (3,350 sq ft)	£32.18/ sq m (£2.99/ sq ft)	20/02/2012
Unit 18 Marchington Industrial Estate, Marchington, ST14 8LP	Industrial/ Warehouse (Under Refurbishment)	374 sq m (4,029 sq ft)	£18.84/ sq m (£1.75/ sq ft)	15/01/2012

Source: Focus (September 2012)

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- 3.34 Table 3.1 above demonstrates the range of rental values that have been achieved in the study area over the previous 2 years. The values achieved will largely depend upon size, specification, location and the quality of the accommodation, industrial estate/ park and surrounding occupiers.
- 3.35 Based on the above, prime rental values of new build industrial accommodation would probably be in the region of £3.70 to £4.60 psf (£40.00 to £50.00 psm), with rents of secondary accommodation (depending on exact condition, specification and size) ranging from £2.80 to £3.25 psf (£30.00 to £35.00 psm), with the upper limit being reserved for better quality secondary accommodation. Freehold values could lie in the order of £39.61 to £50.45 psf (£426 to £543 psm) depending upon size, condition and specification, however the latter are noted through consultation with agents to be scarce opportunities in the study area.
- 3.36 Turning to the office market, our desktop research utilising the Focus database concludes that approximately 9,508 sq ft (102,366 sq m) of office accommodation was let/ sold in 79 deals within East Staffordshire over the past 2 years (September 2010 to September 2012). This equates to an annual take up rate of 51,183 sq ft (4754 sq m). The split between floorspace and unit sizes is not so clear cut when compared to industrial/ distribution accommodation, with around 35% of these deals related to office units between 0 and 500 sqft (0 to 47 sq m) and 17% related to units of between 501 and 1,000 sqft (47 to 93 sq m), and 27% related to deals between 1,0001 and 2,000 sqft (93 to 186 sq m).
- 3.37 Only one deal over the last 2 year period has exceeded 6,000 sqft (557 sq m). This demonstrates that the majority of this take up is likely to originate from local and sub-regional occupiers trading up/ down sizing their property requirements as key lease events arise.
- 3.38 Table 3.2 highlights 10 of the most recent (known) office transactions in the study area (where information is available).

Table 3.2: Office Market- Recent Transactions

Building	Transaction Date	Type/ Quality of Stock	Size SqM	Achieved Rent
Office 1, Newborough Road, Lancaster Park, Burton Upon Trent, DE13 9PD	18/06/2012	B1 Office/ Business (New or Refurbished)	125 sq m 1,350 sq ft)	£59.74/ sq m (£5.55/ sq ft)
9 High Street, Uttoxeter, ST14 7HN	27/05/2012	B1 Office/ Business (Second Hand)	144 sq m (1,546 sq ft)	£41.76/ sq m (£3.88/ sq ft)
20 - 22 Eastern Avenue, Eastgate Business Centre, Burton Upon Trent, DE13 0AT	28/04/2012	B1 Office/ Business (Second Hand)	108 sq m (1,163 sq ft)	£92.46/ sq m (£8.59/ sq ft)
Branston Industrial Estate, Branston, DE14 3WH	31/03/2012	B1 Office/ Business (New or Refurbished)	390 sq m (4,200 sq ft)	£114.21/ sq m (£10.61/ sq ft)
Imex Building, Shobnall Road, Burton Upon Trent, DE14 2AU	01/03/2012	B1 Office/ Business (Second Hand)	46 sq m (500 sq ft)	£96.88/ sq m (£9.00/ sq ft)
Imex Building, Shobnall Road, Burton Upon Trent, DE14 2AU	01/03/2012	B1 Office/ Business (Second Hand)	44 sq m (476 sq ft)	£85.90/ sq m (£7.98/ sq ft)
School House Farm, Beamhurst, Uttoxeter, ST14 5EA	09/02/2012	B1 Office/ Business (Second Hand)	94 sq m (1,013 sq ft)	85.04/ sq m (£7.90/ sq ft)
140- 141 Horninglow Street, Burton Upon Trent, DE14 1PG	28/10/2011	B1 Office/ Business (Second Hand)	288 sq m (1,350 sq ft)	36.49 / sq m (£3.39/ sq ft)
Uttoxeter Business Centre	01/09/2011	B1 Office/ Business (Second Hand)	15 sq m (161 sq ft)	189.66 / sq m (£17.62/ sq ft)
Imex Building, Shobnall Road, Burton Upon Trent, DE14 2AU	01/09/2011	B1 Office/ Business (Second Hand)	43 sq m (465 sq ft)	91.49/ sq m (£8.50/ sq ft)

Source: Focus (September 2012)

- 3.39 The above highlights that compared to industrial/ distribution limited office transactions have taken place within the study area over the previous 2 years. However as with industrial/ distribution deals, rental values vary widely throughout the Borough, from £3.39 to £21.05 psf (£36.49 to £226.58 psm). This is largely a consequence of the limited amount of office accommodation in the study area, the type of occupiers attracted and hence the volatility of the local market. Freehold capital values could lie in the order of £50 to £125 psf (£535 to £1,334 psm). However this should be treated with extreme caution due to the lack of freehold deals achieved in the Borough over the last 2 years.
- 3.40 Finally turning to the retail market, according to the Focus Database, approximately 70 deals took place over a 2 year period (September 2010 – September 2012) equating to 216,191 sq ft (20,083 sq m).
- 3.41 Table 3.3 highlights 10 of the most recent (known) retail transactions in the study area (where information is available).

Table 3.3: Retail Market- Recent Transactions

Building	Type/ Quality of Stock	Size SqM	Achieved Rent	Transaction Date
19 High Street Burton upon Trent, DE13 9LS	Mixed Retail (Not Disclosed)	189 (2,030)	£76.85 (£7.14)	10/05/2012
22 Waterloo Street, Burton upon Trent, DE14 2NA	Retail High Street Unit (Second Hand)	19 (209)	£309.03 (£28.71)	03/04/2012
Unit B2-B3 Sovereign Business Park 24 Market Place, Uttoxeter, ST14 8HP DE14 1PD	Trade Counter/ Park	359 (3,867)	£59.85 (£5.56)	29/03/2012
9 High Street, Uttoxeter, ST14 7HN	Retail High Street Unit (Second Hand)	260 (2,797)	£153.93 (£14.30)	09/01/2012
24 Market Place, Uttoxeter, ST14 8HP	Retail High Street Unit (Second Hand)	93 (999)	£161.68 (£15.02)	03/01/2012
10 Market Place, Uttoxeter, ST14 8HP	Retail High Street Unit (Second Hand)	48 (514)	£157.05 (£14.59)	01/12/2011
1 Guild Street, Burton upon Trent, DE14 1NA	Retail High Street Unit (Second Hand)	80 (865)	£176.74 (£16.42)	03/11/2011
206-209 Station Street, Burton Upon Trent DE14 1AN	Retail High Street Unit (Not Disclosed)	46 (500)	£387.5 (£36.00)	28/10/2011
199 Station Street, Burton Upon Trent DE14 1AN	Retail High Street Unit (Not Disclosed)	186 (2,006)	£134.12 (£12.46)	26/10/2011
330-332 Uxbridge Street, Burton Upon Trent, DE14 3JS	Retail High Street Unit (Not Disclosed)	365 (3,933)	£301.07 (£27.97)	07/10/2011

Source: Focus (September 2012)

- 3.42 Rents within East Staffordshire for retail vary significantly, dependent on the retail unit's location, size and condition. Retail values in Burton over the previous 2 year period range from £2.73 to £30.12 psf (£29.39 to £324.2 psm). Values elsewhere in the Borough vary from £14.30 to £15.02 psf (£153.82 to £161.68 psm). There have been approximately 10 freehold sale transactions in the previous 2 years. Unfortunately the details of these transactions have not been disclosed to the Focus database.

Availability

- 3.43 As of September 2012 there were circa 21 available industrial properties in Uttoxeter and 75 in Burton (according to Focus), which equates to a total available floorspace of just over 1,994,099 sqf(185,256 sqm). Across these two settlements, asking rents vary from £2 to £6.59 psf (£21.53 to £70.92 psm) dependent upon size, specification and quality of units. The majority of available units are classified as secondary accommodation, with fewer new/ refurbished premises evident from our desk top research (June 2013).
- 3.44 Turning to office accommodation, as of June 2013, there were circa 161 available office properties across Burton upon Trent and Uttoxeter (according to Focus), equating to total available floorspace of circa 408,724 sq ft (37,973 sq m). Quoting rents for office accommodation are notably different across the two centres, with rents in Uttoxeter between £135.51 to £147.88 psm (£12.59 to £13.74 psf) compared to a wider range across Burton upon Trent from £34.98 to £200.95 psm (£3.25 to £18.67 psf). Agents have reported that the office market is very slow, with few transactions.
- 3.45 Finally, turning to the retail market, there were 101 available retail properties across Burton upon Trent and Uttoxeter as of June 2013 (according to Focus). The majority of units were available in Burton upon Trent, which is unsurprising as this comprises the Borough's primary retail centre.

Competition

- 3.46 Staffordshire is now recognised as an established pitch for national and regional high bay warehousing. The development of the M6 Toll Motorway has assisted in opening up this area in this regard. Although the area is recognised as an established location, it is not generally considered prime pitch, as it is not located on a motorway junction, however the proximity of the A38, A5 and M6 Toll have assisted in the area becoming referred to as a good second division location in terms of industrial / distribution development. In particular Burton upon Trent has been able to capitalise on its large, skilled workforce which has allowed it to attract occupiers away from locations which are in closer proximity to the region's motorway network.
- 3.47 Land that accommodates large distribution warehouses (i.e. 10,000 sqm/ 100,000 sqft) and can operate unrestricted, in close proximity to motorways, major highway networks and away from residential areas is generally in demand. The supply of new industrial units is limited at present, with few units under development and the majority of developers with B1 / B2 / B8 sites seeking pre-let agreements/ pre sales on a design and build, rather than providing units speculatively to the market. This trend is set to continue as few developers are currently considering speculative development due to the lack of funding and lack of occupier confidence.

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- 3.48 Other regional locations with a supply of existing modern units are likely to attract 'footloose' regional occupiers who need units immediately rather than waiting nine to 12 months for units to be built.
- 3.49 In regards to the retail market, according to PROMIS Burton Upon Trent faces above average competition from competing retail centres and ranks 152 out of the 200 PROMIS centres on the PMA Competition Indicator (a rank closest to 200 reflects a high level of competition). Major local competitors include; Lichfield, Derby, Leicester, Stoke-on-Trent and Coventry.

Investment Market

- 3.50 The investment market is a further factor affecting development viability of commercial property. Investment yields experienced a sharp rise throughout 2007 and 2008 as a consequence of the 'credit crunch', the subsequent downturn in the property investment market and wider UK economic recession over the last three years. An increase in investment yields will, all other factors remaining equal, cause a corresponding fall in the capital value of property purchases as an investment (i.e. with a tenant in place generating a rental return to the landlord).
- 3.51 Increased activity in the property investment market into 2009/10 (particularly for prime investments), driven by a combination of competitive pricing and a decreased supply of prime property and good quality secondary property, resulted in prime yields falling (with corresponding improvements in the capital value of prime investments). This, in turn, helped to improve the development viability of commercial property in prime locations. However, general economic conditions in the UK over the last 12 months have been slower to improve than previously anticipated following the official end to the economic recession in Q4 2009. Most commentators are anticipating a continuing economic flat-line with limited / slower growth expected and than originally forecast. This is likely to mean weak demand from most occupiers in the property market in the short to medium term, which is likely to bring an end to this recent period of strong investment returns for good quality investment property.
- 3.52 Recent economic forecasts currently expect investor demand for prime and good quality secondary property to continue to be strong and to exceed supply over the short to medium term, however there are still many risks to this outlook. For property at the more secondary/ tertiary end of the market, investors will continue to be concerned about issues such as void rates, the weaker covenant strength of typical occupiers and the challenge of re-letting buildings in an era of ever shorter leases.

Industrial and Office Investment Markets in East Staffordshire

- 3.53 There have been very few industrial/ distribution transactions locally in the last 2 years. The most notable transaction has been the freehold sale of a 146,649 sq m (157,681 sq ft) industrial/ warehouse unit at Centrum 100. Cordea Savills LLP on behalf of the Charities Property Fund purchased the industrial unit from GE Capital Ltd for £9,550,000 as an investment, reflecting a yield of 8.61%. The property is let to Unipart Logistics Limited on a 10 year FRI lease expiring on 21 November 2017 and produces an annual rental income of £869,464 pa.
- 3.54 All research has demonstrated that there is no evidence of investment office transaction in the Borough over the past 2 years.
- 3.55 There is a lack of transaction evidence over the past 2 years upon which to base a robust opinion of potential office or industrial yields achievable in the wider area. This is largely due to current market volatility and lack of prime property throughout the Borough.

Retail Investment Market in East Staffordshire

- 3.56 Given the depressed market, there have only been a limited number of retail investment transactions since September 2010 in the Borough, according to our desk-top research. The most recent of which, and the most significant, was in July 2011 which comprised a freehold investment sale of the 7,646 sq m (82,300 sq ft) Dovefields retail warehouse park. Cordea Savills LLP purchased the Park from MJ Barrett (Developments) Ltd, reflecting a yield of 7.3%.

Development Land Market

Employment

- 3.57 Unsurprisingly, a downwards pressure on employment land values (as well as rental and capital values) has also been experienced since the credit crunch and property market downturn. This is due to increases in investment yields and weakening occupier demand (discussed above) which have lowered the value of end development. Increases in the margins developers require, to reflect the additional perceived risk, has reduced viability further.
- 3.58 The shortage of debt finance and deterioration of wider economic conditions have subdued the appetite of industrial developers for speculative industrial development, and crucially, their ability to secure development finance. Factors such as the changes to the Empty Rates liability and introduction of Energy Performance Certificates (EPC) have provided additional constraints over the past two years.

- 3.59 It is likely therefore that the successful delivery of sites within East Staffordshire will require a proactive and innovative approach to securing funding from both the public and private sectors, particularly in light of the current economic conditions and the uncertainty surrounding future regeneration funding streams.
- 3.60 GVA's industrial team advise that land values in the Borough are likely to vary dependent upon numerous factors, including plot size, servicing and road/ motorway access. However it is estimated that a development site in the Burton area with planning consent for B1/ B2/ B8 uses could achieve a land value in the order of £275,000 to £300,000 per acre. Land values in Uttoxter are likely to be below this figure at £200,000 per acre.

Retail

- 3.61 In terms of land values for food retail development in the Borough, GVA's Retail Agency team anticipate food retail land values would be as follows:
- 25,000 to 40,000 sq ft store: £750,000/ acre
 - 40,000 to 60,000 sq ft store: £1,000,000/ acre
 - 60,000+ sq ft store: £1,250,000 to £1,500,000/ acre
- 3.62 Retail land values for non food developments are usually significantly below the values achieved for supermarkets.

4. Review of Employment Land Supply

- 4.1 This section of the report provides a review of the existing supply of employment land across East Staffordshire. The review is presented as an update to the information included within the 2009 ELR.
- 4.2 GVA have undertaken an independent assessment of each site, based upon site visits by professional staff from GVA. This assessment included the consideration of a range of market, sustainability and physical assessment criteria. The approach focused on updating, where relevant, the information contained on each site within the original ELR document. No site investigation works have been undertaken on the sites.
- 4.3 Additional information on the sites including a classification of employment property market segments and types of site, and an assessment of the quality of the sites ('Good', 'Average', 'Poor') has been factored in to the update.
- 4.4 It should be noted that this analysis reflects existing baseline conditions for the sites assessed and is taken as a snapshot in time. It does not take into account any proposed improvements / investment to any of these areas of existing employment activity. An example of the proformas completed for the site assessment can be found at Appendix 1.
- 4.5 The supply considered within the analysis comprises two key components:
- I. Existing employment premises and developed out sites which make a contribution to economic growth and the business base across the borough; and
 - II. Existing employment land which remains undeveloped which will continue to serve the needs of businesses within the area throughout the Plan period.
- 4.6 Two additional sites have been considered within the supply analysis: land to the west of Uttoxeter (PA1) and Lawns Farm (PA2). The sites have been measured and cover total areas of 33.4 hectares and 136.6 hectares respectively; however their site area has been reduced to reflect the totals proposed within policy to read 10 hectares and 20 hectares respectively.
- 4.7 The assessment does not include "committed supply" being employment sites under construction at the time of writing, or with planning permission for employment uses. No Call for Sites process has been undertaken as part of the preparation of the update to the ELR.
- 4.8 Further detail on this categorisation of sites included within the update is provided in later text within this section.
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- 4.9 At the outset of assessing the land supply, a number of sites identified within the previous ELR were discounted from the assessment due to planning permissions granted for non-employment uses or being developed out for non-employment uses. The sites removed are listed at Appendix 2.
- 4.10 The quantum of sites split between the existing and potential future site is show in Table 4.1 below.

Table 4.1: Summary of Employment Land Supply in East Staffordshire

Site Typology	Existing Employment Sites (Ha)	Employment Development Land (Ha)	Additional Sites Considered (Ha)	Total (Ha)
Total Area (Ha)	295.75	107.8	30	433.55

Source: GVA, 2012

- 4.11 The review of this total land supply includes both quantitative and qualitative elements (in accordance with ODPM guidance).

Existing Employment Sites (Developed / In-Use)

- 4.12 This definition includes existing employment land that was in use or developed out at the time of the update. The assessment relating to these sites is based both on site visits undertaken, and existing knowledge within East Staffordshire Borough Council. A total of 69 sites, comprising 296 hectares have been identified within this category. These sites are dispersed across the borough, as illustrated on the plan within Appendix 3.
- 4.13 Using the assessment of 'good', 'average', and 'poor' across the supply it possible to undertake some quantitative analysis of the existing employment sites, as detailed below. A more qualitative assessment of the land supply against each measure is presented for key sites within the conclusions of this section.

Quality and Market Demand

- 4.14 The site assessment matrix is included at Appendix 4, with a summary of the quality and market demand of the existing employment sites supply summarised below. The assessment against this measure includes consideration of a number of factors including:
- Quality of the existing portfolio (buildings and structures on the site);
 - Quality of the wider environment;
 - Strategic access; and

- Market conditions (including e.g. levels of vacancy, visible market activity, nature of tenants).

Table 4.2: Summary of Quality and Market Demand – Existing Employment Sites

	Number of Sites	% Total Sites	Area (Ha)
Poor	10	14%	59.3
Average	22	32%	65.98
Good	37	54%	170.5
Total	69	100%	295.75

Source: GVA, 2012

- 4.15 It can be seen in the above table that the majority of the existing employment sites across East Staffordshire are of average to good quality and market demand. Over half of the sites were identified to be good, covering 170 hectares of active employment land.
- 4.16 The site assessment notes that for all of the sites identified to be ‘poor’ against this measure, site access has been noted to be an issue either strategically, with poor links to strategic transport infrastructure and therefore access to markets and labour force or for example, with access through a residential area limiting the wider commercial appeal of the location.

Availability

- 4.17 Given that the existing employment sites across the borough were developed out (albeit to varying degrees) at the time of the assessment all are considered within the analysis to be not available, although it is recognised that there is vacancy on some sites as noted previously in the commercial market analysis.

Table 4.3: Amount of Floorspace in East Staffordshire (2013)

Bulk Class	Land Use Designation	Floorspace (m2)
Offices	B1	154,000
Factories/Warehouses	B2/B8	1,632,000
	Total	1,786,000

Source: Valuation office Agency (VOA), 2013

- 4.18 It is noted that the existing employment sites are not homogenous, and therefore some sites will require investment, with some infill opportunities or potential wholesale redevelopment opportunities over the plan period.
- 4.19 Some sites will be preferable for this approach both in market and policy terms. For example, it is noted that the existing employment site supply across the borough includes a number of sites of a significant size within fairly rural areas. The history of these

sites and their current activity, including e.g. maintenance and depot facilities, is in many cases linked to major businesses such as JCB within East Staffordshire and adjoining areas. Their future use is therefore linked to the continued activity and investment by these businesses.

4.20 Examples of sites which fall into this category of 'legacy' sites in fairly rural areas include:

- Greaves Lane, near Draycott in the Clay (site reference 135);
- Elms Farm, Bramshall (site reference 151);
- Mayfield Yarns (site reference 195); and
- Distribution Depot (site reference 132).

4.21 Specific policy recommendations regarding the potential redevelopment or intensification of existing employment sites are suggested within Section 7, taking into account the findings of the whole site assessment process including quality, market demand, and locational factors.

Classification of Land

4.22 The ELR Guidance Note recognises the importance of understanding the particular characteristics of specific areas but also the classification of sites from a commercial perspective. The guidance identifies the list of classification types as included in the following table, including a brief description of each.

4.23 The assessment of each site in this context has included both current activity on the site, the nature of existing premises on the site, and the potential commercial market appeal of the site in the future.

Table 4.4: Summary of Classification of Land – Existing Employment Sites

	Number Sites	% Total Sites	Area (Ha)
Established or Potential Office Locations	5	7.2%	16.85
High Quality Business Parks	1	1.4%	9.00
Research and Technology / Science Parks	0	0.0%	0.00
Warehouse / Distribution Parks	8	11.6%	51.85
General Industrial / Business Areas	46	66.7%	147.85
Heavy / Specialist Industrial Sites	2	2.9%	4.00
Incubator / SME Cluster Sites	0	0.0%	0.00
Specialised Freight Terminals	0	0.0%	0.00
Sites for Specific Occupiers	6	8.7%	64.60
Recycling / Environmental Industries Sites	1	1.4%	1.60
Total	69	100.0%	295.75

Source: GVA, 2012

- 4.24 It is clear from the assessment undertaken that the majority of sites across East Staffordshire are 'General Industrial / Business Areas', defined within the guidance to be: "coherent areas of land which are, in terms of environment, road access, location, parking and operating conditions, well suited for retention in industrial use. Often older, more established areas of land and buildings. A mix of ages, qualities and site/building size." This includes 46 sites accommodating 148 hectares of land.
- 4.25 Outside of this type of site, there are major concentrations of land (although not necessarily number of sites) identified to be 'Warehouse/Distribution' "large, often edge/out of town serviced sites located at key transport interchanges", and 'Sites for Specific Occupiers' "generally sites adjoining existing established employers and identified by them or the planning authority as principally or entirely intended for their use". This includes over 116 hectares of land across the borough.
- 4.26 A smaller quantum of land is identified as being active or suitable as 'Established or Potential Office Locations', "sites and premises, predominantly in or on the edge of town and city centres, already recognised by the market as being capable of supporting pure office (or high technology R&D/business use), or 'High Quality Business Parks', "likely to be sites, no less than 5ha but more often 20ha or more, already occupied by national or multi-national firms or likely to attract those occupiers. Key characteristics are quality of buildings and public realm and access to main transport networks. Likely to have significant pure office, high office content manufacturing and R&D facilities. Includes 'Strategic' inward investment sites". This includes 26 hectares of land concentrated in 6 sites.

Undeveloped Employment Sites

- 4.27 As stated previously, the site assessment exercise included the consideration of employment sites identified within the original ELR which remain undeveloped, i.e. which are potentially 'available' for employment development over the plan period. Development sites which have planning permission for non-B Use activities have been discounted from this analysis.
- 4.28 As with the assessment of existing employment sites, the undeveloped employment sites assessment has been based both on site visits and existing knowledge from the Council, including the previous ELR document.
- 4.29 A total of 20 sites, comprising 105.5 hectares have been identified within this category. These sites are dispersed across the borough, as illustrated on the plan within Appendix 3.
- 4.30 Using the assessment of 'good', 'average', and 'poor' across the supply it possible to undertake some quantitative analysis of the existing employment sites, as detailed below. A more qualitative assessment of the land supply against each measure is presented for key sites within the conclusions of this section.

Quality and Market Demand

- 4.31 The site assessment matrix includes an assessment of the quality and market demand for the undeveloped employment sites supply summarised below. The assessment against this measure includes consideration of a number of factors including:
- Quality of the existing portfolio (buildings and structures on the site);
 - Quality of the wider environment;
 - Strategic access; and
 - Market conditions (including e.g. levels of vacancy, visible market activity, nature of tenants).

Table 4.5: Summary of Quality and Market Demand – Undeveloped Employment Sites

	Number of Sites	% Total Sites	Area (Ha)
Poor	2	10.0%	3.5
Average	5	25.0%	48.3
Good	13	65.0%	53.7
Total	20	100.0%	105.5

Source: GVA, 2012

4.32 It can be seen in the above table that the majority of the undeveloped employment sites across East Staffordshire are of average to good quality and market demand. A total of 65% of the sites were identified to be good, although this includes just 54 hectares of 'available' employment land.

4.33 The two sites considered to be 'poor' quality and market demand are Site 25 'Former railway sidings rear of bonded warehouse' and Site 130A 'Marchington Industrial Estate':

- Former railway sidings rear of bonded warehouse (Site 25): site nature, including its narrow shape makes it difficult to develop, site is also noted to have no direct access with concerns on how this could be introduced; and
- Marchington Industrial Estate (Site 130A): the site includes vacant / underutilised land and derelict / poor quality disused buildings, noted to have difficult access and poor public transport provision and wider vacancies noted within the area.

Availability

4.34 The undeveloped employment sites have been considered in terms of their availability for development over the plan period. This includes consideration of:

- Ownership and user constraints (where known);
- Site development constraints;
- Sequential test; and
- Brownfield / Greenfield classification.

Table 4.6: Summary of Availability – Undeveloped Employment Sites

	Number of Sites	% Total Sites	Area (Ha)
Poor	2	10.0%	15.8
Average	7	35.0%	51.2
Good	11	55.0%	38.6
Total	20	100.0%	105.5

Source: GVA, 2012

- 4.35 As with the assessment of quality and market demand, the majority of undeveloped site supply across East Staffordshire is noted to be of at least average availability, with over half of the development sites identified to be 'good' against this measure, although this covers just 39 hectares of land supply.
- 4.36 Also similarly to the assessment of quality and market demand, two sites are found to have 'poor' availability, site 170 'Derby Road, Uttoxeter' and site SAI200 (unnamed). Both sites are noted to be agricultural land, with concerns over potential environmental constraints / considerations, and their Greenfield nature in the context of their availability.

Classification of Land

- 4.37 As with the assessment of existing employment sites, the undeveloped employment land has been classified in line with the ELR Guidance Note.
- 4.38 The assessment of each site in this context has included both current activity on the site, the nature of existing premises on the site, and the potential commercial market appeal of the site in the future.
- 4.39 There is a more balanced portfolio of undeveloped employment sites than developed employment sites in terms of their classification, certainly in terms of numbers of sites identified. This includes 25% of undeveloped sites identified as having office development potential, 20% as having warehousing / distribution potential, and 45% as having general industrial / business potential.
- 4.40 This picture is not as balanced when considered in terms of actual land available, with over half of the supply concentrated in warehouse / distribution land, but less than 4 hectares in land considered suitable for office development. This reflects the average size of these sites, with the office sites much smaller than for other uses.
- 4.41 The one site noted to have 'high quality business park' potential within the assessment is Site 170 'Derby Road, Uttoxeter'.

Table 4.7: Summary of Classification of Land – Existing Employment Sites

	Number Sites	% Total Sites	Area (Ha)
Established or Potential Office Locations	5	25.0%	3.7
High Quality Business Parks	1	5.0%	15.8
Research and Technology / Science Parks	0	0.0%	0.0
Warehouse / Distribution Parks	4	20.0%	52.5
General Industrial / Business Areas	9	45.0%	31.3
Heavy / Specialist Industrial Sites	1	5.0%	2.3
Incubator / SME Cluster Sites	0	0.0%	0.0
Specialised Freight Terminals	0	0.0%	0.0
Sites for Specific Occupiers	0	0.0%	0.0
Recycling / Environmental Industries Sites	0	0.0%	0.0
Total	20	100.0%	105.5

Source: GVA, 2012

Additional Site Supply

- 4.42 Two potential allocations have been considered in addition to the existing employment land supply which are identified in the Preferred Option Local Plan. These are: Land West of Uttoxeter, and Lawns Farm. For the purposes of this ELR update these Proposed Allocation sites have been given a reference: Land West of Uttoxeter (PA1), and Lawns Farm (PA2).
- 4.43 Both sites have been identified as potential large Sustainable Urban Extensions to support the preferred option for growth in Burton and Uttoxeter respectively, supplemented with brownfield allocations within the urban areas and smaller Greenfield allocations adjacent to existing communities.

Land West of Uttoxeter (PA1)

- 4.44 The Land West of Uttoxeter is a Greenfield site identified within the Preferred Option Local Plan as a sustainable urban extension to deliver housing and employment growth within the Uttoxeter area. It is identified within the plan to have potential to deliver 700 residential units and 10 hectares of employment land, including a wide range of employment opportunities.
- 4.45 The site is well located proximate to the A50, with good frontage. However, its commercial appeal would rely on access from this strategic road infrastructure, rather than on relying on routes through Uttoxeter off the B5027 Bramshall Road. Assuming this could be achieved however, the site is considered to have good commercial market appeal, with potential for office and/or warehouse / distribution uses.

- 4.46 There are potential development constraints on the site, including environmental associated with, for example, mature planting and trees, and given its Greenfield nature. However, it is considered to be deliverable in the medium to long term, with the potential to incorporate landscaping in any future development to mitigate potential environmental impacts.

Lawns Farm (PA2)

- 4.47 Lawns Farm is a Greenfield site identified within the Preferred Option Local Plan as a sustainable urban extension to deliver housing and employment growth within the Burton upon Trent area. As part of the site, in combination with the also proposed 'Land South of Branston', it is proposed that up to 2,750 dwellings and 20 hectares of employment land (new provision) could be delivered. The policy refers to a 'wide range' of employment opportunities that could be delivered on the site.
- 4.48 The site is visible from the A38, a major route, giving it prominence as a potential employment site. To maximise the commercial appeal of the site, which could be for office and/or distribution and warehouse uses, access would be sought from the south via the existing roundabout on the A38.
- 4.49 As with the previous site, there are potential environmental considerations associated with the development of this site, given its rural and Greenfield nature, but with the potential for landscaping and design mitigation.

Coors Brewery

- 4.50 Molson Coors have a number of landholdings within Burton town centre, captured within the existing site supply analysis as follows:
- Site 44: Coors Middle Yard;
 - Site 48: Coors Brewery, Station Street;
 - Site 49a Coors Offices, Station Street / Cross Street; and
 - Site 49b Coors Offices, High Street.
- 4.51 It is understood that Molson Coors have commissioned consultants to consider options for the partial consolidation of the existing brewery operations within Burton town centre. The consideration at the moment is focused on the Headquarters offices at High Street (Site 49b within this ELR Update site assessment), with the potential to consolidate this activity into the existing offices at Station Street (Site 49b within this assessment). As yet the findings of this review of the portfolio of land holdings is unknown and therefore cannot be reported within this document.
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- 4.52 The ELR Update site assessment has identified this site to have 'average' quality and market demand, on the basis that there are not high levels of latent office demand within Burton town centre. The period quality of the buildings on the site could attract market interest, but could also be expensive to bring up to market standards.

Twin Rivers Park and Brookhay Villages

- 4.53 Proposals have been put forward for a strategic development 'straddling' the Lichfield District and East Staffordshire Borough boundary. The development being promoted by the landowners in the area includes a new watersports centre and rowing lake (within East Staffordshire), a business park (within East Staffordshire), and 7,500 new homes (within Lichfield).

- 4.54 The proposals within East Staffordshire are summarised below.

- 4.55 Sports and leisure:

- A 2km rowing facility with up to 2 lanes, return lane and spectator area;
- Sailing facilities;
- Canoeing on the Rivers Trent and Tame; and
- Sports goods outlet with active try out / practice areas.

- 4.56 Commercial and employment:

- Hotel facilities (circa 200 bed two tier facility);
- Conference centre;
- Spa / health club;
- A range of complementary A1, A2 and A3 uses to support the visitors to the NMA, sport, leisure and employment park;
- A targeted employment park that would build upon the sport/leisure link;
- Offices facilities suitable for regional headquarters type uses;
- Hi-tech industry focused upon sport / leisure apparatus manufacturing and maintenance; and
- Hi-tech spin-off manufacturing for medical and other specialist areas.

- 4.57 There is limited market evidence to support the general need for this development in terms of employment generation. However, this does not preclude the specific opportunity to develop a sports facility of strategic significance in this location. The justification for the inclusion of employment floorspace as part of the proposed development is linked to direct spin-off potential from the sports facility, and therefore

should effectively be treated outside of the general land supply to meet employment demand / requirements over the plan period.

Conclusions

- 4.58 The conclusions of the land supply assessment are structured to consider initially the headline supply, but also break this supply down into the extent to which there is good quality, available employment land supply across East Staffordshire. This land supply is considered in the context of demand requirements in subsequent sections of this report.
- 4.59 A total of 401 hectares of employment land has been identified and considered within the site assessment including both existing (active / developed) sites and vacant development land. An additional 30 hectares of land has been identified within the Preferred Options Local Plan and taken into account within the study. This results in a total supply position of 431 hectares, of which 105.5 hectares is vacant for development purposes.
- 4.60 The assessment of this land supply has included consideration of the quality of both vacant land and existing employment developments to later be compared to the requirements over the plan period. Critically, the ELR must ensure that there is sufficient and appropriate land supply to meet economic needs over the plan period. The NPPF is clear in the need for the planning system to ensure “...sufficient land of the right type is available in the right places and at the right time to support growth and innovation” (Para 7, Bullet 1).
- 4.61 Of the 105.5 hectares of vacant employment land across East Staffordshire only 36.47 hectares, within 8 sites, has been identified to have both ‘good’ quality and market demand and availability. A summary of these sites is included below.

Table 4.8: Good Quality Land Supply – Vacant Employment Sites

Site	Area (Ha)	Classification	Comments / Notes
4. Pirelli – existing factory	27.5	General Industrial / Business Area	Brownfield site, development brief in place
4b. Pirelli – Derby Road frontage	0.7	General Industrial / Business Area	Development land adjacent to Pirelli, covered by development brief
28. Open land on Derby Road	0.1928	General Industrial / Business Area	Road frontage site, within existing employment area
29. Land fronting Maltings	0.0812	Established / Potential Office Location	Road frontage, access in place, site ready for development
67A. Expansion land	0.3	Established / Potential Office Location	Good access to A38, within existing employment area
67D. Mercia Business Park	3.5	Warehouse / Distribution	Good access to A38, open level site, hotel built on part of site which needs to be released
80. Centrum East	2.023	Established / Potential Office Location	Development site including office development nearing completion, good access to A38, high profile location
100F. Remaining plot at Barton Business Park	2.175	Warehouse / Distribution	Proximity to A38, good access, established market potential on wider estate

- 4.62 Importantly, none of the vacant sites considered were identified as ‘poor’ against both the quality and market demand and availability measures, suggesting that there is a reasonable quality across the supply in general.
- 4.63 Both of the proposed urban extension sites considered within the analysis are found to have the potential to contribute to supply in the medium to long term. Both are noted to have potential constraints including environmental associated with their Greenfield nature, but are located in areas where there would be market demand especially given their prominence / visibility.
- 4.64 The existing employment sites were only considered in terms of their quality and market demand. Those identified ‘poor’ quality are noted in the following table.

Table 4.9: Poor Quality Land Supply – Existing Employment Sites

Site	Area (Ha)	Classification	Comments / Notes
7a. Wetmore Lane, CEMEX Plant	0.7534	General Industrial / Business Area	Site access issues noted including entry via hump-back bridge, proximate to residential uses on all sides, poor location in employment terms
93. Former Webb Ivory, Queen Street	1	General Industrial / Business Area	Surrounded by residential uses (dense), in part directly adjoining the factory building, access via narrow street
94. Midland Timber	0.07845	General Industrial / Business Area	Timber works in a street of diverse residential uses (terraced), road access noted to be an issue, parking issues
111. Anslow Park	3.1	General Industrial / Business Area	Small industrial estate in rural area, fairly modern units on site, good condition, conversion of other farm buildings to residential, potential local / rural appeal
120. Bramshall	5.2638	General Industrial / Business Area	Industrial estate in rural location, known as Bramshall Industrial Estate, modern units, some issues with the appearance of the 'common' areas, but estate is well used, with demand evident
130. Marchington Industrial Estate	26.7	General Industrial / Business Area	Large industrial estate, range of unit sizes, appears well maintained, good activity levels on the site and vacant units being marketed
135. Greaves Lane, nr Draycott in the Clay	0.3	General Industrial / Business Area	Semi-derelict former farm building, narrow country lane access
151. Elms Farm, Bramshall	0.4	General Industrial / Business Area	Single industrial unit in former farm yard in rural location, adjacent / part of active farm
195. Mayfield Yarns	1.954	General Industrial / Business Area	Factory building, in use (single use), rural surrounds
132. Distribution Depot, Stubby Lane	7.4	Site for Specific Occupier	Well maintained buildings, access via B5017 but difficult direct access, distribution use, proximate to Marchington Industrial Estate

4.65 There is a clear distinction within these existing employment sites as to those which are poor quality sites but in good locations with potential longer term appeal, and those which are poor sites in poor locations with limited longer term appeal identified. Those

sites that are recognised within the analysis to be 'legacy' sites, i.e. sites that have or had active employment uses on traditionally but have limited market appeal in the future or in the event that the current occupier vacates the premises includes:

- 7a. Wetmore Lane, CEMEX Plant – active, but limited potential if existing occupier relocates due to site constraints;
- 93. Former Webb Ivory, Queen Street – limited commercial appeal given nature of building and surrounding environment, including site access;
- 94. Midland Timber - limited commercial appeal given nature of building and surrounding environment, including site access;
- 135. Greaves Lane – No wider commercial appeal and unlikely to be sufficient rural demand for conversion of buildings;
- 195. Mayfield Yarns - active, but limited potential if existing occupier relocates due to site constraints; and
- 132. Distribution Depot, Stubby Lane - active, but limited potential for pure employment use if existing occupier relocates due to site constraints and proximity to existing stronger employment location, site could have mixed use potential.

5. Forecasts and Scenarios of Future Employment Demand

Background to Economic Projections and Scenarios

- 5.1 This section sets out the methodology underpinning the preparation of the employment demand forecasting component of the update and the translation of employment projections into floorspace and land requirements. It provides a clear audit trail of the methods, assumptions and stages of work undertaken.
- 5.2 The 2009 ELR identified three scenarios of future employment demand including:
- Labour demand scenario: using updated forecasts provided by Cambridge Econometrics (Local Economy Forecasting Model) (2009);
 - Past trends scenario: which takes historical rates of growth during the 1998-2007 period, recognised to be a period when the East Staffordshire economy performed well, and projects these forward to 2020; and
 - Labour supply scenario: which is based on assumptions about how the borough's population and labour force may change to 2020.
- 5.3 In order to provide an update to the 2009 ELR the latest forecasts have been obtained from Cambridge Econometrics, reflecting the impact of the recession on the economy. Forecasts for the East Staffordshire authority area, in addition to the West Midlands and the UK have been obtained.
- 5.4 When utilising this data, and specifically in the translation of employment forecasts into floorspace and land requirements, we have noted that the guidance acknowledges this to be "difficult and to some extent a matter of professional judgement". From our experience, this is best achieved by grouping Standard Industrial Classification (SIC) data into around 25 sectoral groupings appropriate for the study area and the employment property product types available. This is discussed in more detail below.

Approach

- 5.5 The methodology for the development of employment land forecasts is set out in the following steps:
- Source employment projections;
 - Formulate appropriate alternative scenarios;

- Create appropriate sector groupings and match to land use categories;
- Identify worker density assumptions for converting employment to floorspace and calculate floorspace requirements; and
- Convert floorspace requirements to land requirements.

Step 1: Source Employment Projections

5.6 The baseline employment projections used in this update are the Cambridge Econometrics LEFM model which aggregates the economy into 41 industrial sectors, as shown in the following figure. The sector groupings are specific to the local East Staffordshire economy.

Figure 5.1 Cambridge Econometrics' Industrial Sectors

Industry	2 and 3 Digit NACE Codes
1 Agriculture etc	01, 02, 05
2 Coal	10
3 Oil & Gas etc	11, 12
4 Other Mining	13, 14
5 Food, Drink & Tobacco	15, 16
6 Textiles, Clothing & Leather	17, 18, 19
7 Wood & Paper	20, 21
8 Printing & Publishing	22
9 Manufactured Fuels	23
10 Pharmaceuticals	24.4
11 Chemicals nes	24 (ex24.4)
12 Rubber & Plastics	25
13 Non-Metallic Mineral Products	26
14 Basic Metals	27
15 Metal Goods	28
16 Mechanical Engineering	29
17 Electronics	30, 32
18 Electrical Engineering & Instruments	31, 33
19 Motor Vehicles	34
20 Other Transport Equipment	35
21 Manufacturing nes	36, 37
22 Electricity	40.1
23 Gas Supply	40.2, 40.3
24 Water Supply	41
25 Construction	45
26 Distribution	50, 51
27 Retailing	52
28 Hotels & Catering	55
29 Land Transport etc	60, 63
30 Water Transport	61
31 Air Transport	62
32 Communications	64
33 Banking & Finance	65, 67
34 Insurance	66
35 Computing Services	72
36 Professional Services	70, 71, 73, 74.1-74.4
37 Other Business Services	74.5-74.8
38 Public Administration & Defence	75
39 Education	80
40 Health & Social Work	85
41 Miscellaneous Services	90 - 99
42 Unallocated	

Source: Cambridge Econometrics and GHK analysis, 2012

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- 5.7 The projections are sufficiently disaggregated to use as a basis for employment land forecasting and include historical data from 1981 to 2011 with projections from 2012 to 2031 for East Staffordshire. They represent the results of model-based analysis, focusing on the future performance of the existing industrial structure in East Staffordshire, and have not been refined in light of any qualitative information, legislative changes or other 'soft' information.

Step 2: Formulate Appropriate Alternative Scenarios

- 5.8 This sub-section outlines the methodology used to formulate the alternative scenarios for economic growth within East Staffordshire.

Labour Demand Scenario

- 5.9 The latest CE LFM employment projections form the baseline projections for the update to the ELR. The calculations use the projected employment growth rates produced for East Staffordshire by the CE LFM model and applies these to historic employment data sourced from the Business Register and Employment Survey (BRES)³ for each sector in the borough.
- 5.10 In each scenario the base year is 2010 as this is the most recent year at the time of writing for which historic BRES data is available. Each scenario is therefore based on the same historic BRES employment data, disaggregated between 88 sectors (based on 2 digit SIC2007 data) and includes projections from 2010 to 2031.

Additional Labour Demand Scenario

- 5.11 In addition to the CE LFM employment projections, a further set of forecasts has been obtained from Experian. It is recognised in considering econometric forecasts that a range of alternatives allows for more considered conclusions to be drawn within the analysis. This reflects the uncertainty around forecasting over long periods of time, particularly within the current economic climate. In addition, it is recognised that the SHMA utilises Experian data.
- 5.12 As within the baseline scenario, the base year within the analysis is taken as 2010..

15-Year Past Trend

- 5.13 The initial past trend scenario is based on an analysis of recent past (15 year) economic trends to set overall employment growth targets for 2031. This is purely a trend-based

scenario using historic LEFM data (1995 to 2010) and applies this to BRES data (2010 base). This has been done for each sector and has then been adjusted to take account of unrealistic growth rates and to ensure that the total of the sectors matches the projected growth in total employment (when the 15 year trend is applied).

25-Year Past Trend

- 5.14 As for the previous scenario, this second past trend scenario is based on an analysis of longer term past (25 year) economic trends to set overall employment growth targets for 2031. This is purely a trend-based scenario using historic LEFM data (1985 to 2010) and applies this to BRES data (2010 base). This has been done for each sector and has then been adjusted to take account of unrealistic growth rates and to ensure that the total of the sectors matches the projected growth in total employment (when the 25 year trend is applied).

Labour Supply Scenario

- 5.15 A further scenario has been considered within the analysis to date, termed the 'labour supply scenario'. This is an assessment of employment growth linked to the expected increase in the local population and associated labour force linked with the preferred housing projections within the SHMA and emerging Core Strategy.
- 5.16 The calculations undertaken convert the 'labour force' projections in the revised Sub National Population Projections (SNPP) (as set out in full in the SHMA report) into employment projections by applying the commuting ratio (job-balance ratio). The projected growth rates have been applied to BRES data (2010 base). The steps followed are summarised in the bullet points below:
- Projections of job numbers have been calculated by applying the labour force ratio (commuting ratio) for East Staffordshire to the revised SNPP figures;
 - Growth rates have been calculated for these total job numbers (i.e. projected growth from 2010-11, from 2011-12, from 2012-13, etc) and applied to the latest BRESI data for 2010 (the base data and base year applied through all of the scenarios to provide consistency and comparability). This provides projections of total jobs in East Staffordshire from 2011 to 2031 based on the revised SNPP figures; and
 - We have then assumed that the distribution of jobs between sectors is the same as in the Labour Demand scenario. To do this we have calculated 'shares' for each

³ The Business Register and Employment Survey (BRES) is an amalgamation of two Office for National Statistics (ONS) surveys: the Annual Business Inquiry (ABI) and the Business Register Survey (BRS).

year from 2011 to 2031 in the baseline projections and applied these to the above projections of total jobs.

- 5.17 Summaries of the resulting employment forecasts broken down by sector in 2031 under each scenario are presented in Table 5.1. Detailed tables for each individual scenario can be found in Appendix 5, providing employment totals for a selection of summary years including 2011, 2016, 2021, 2026, and 2031.
- 5.18 The five scenarios, presented in the following table, provide a moderate range of projections for employment growth in East Staffordshire to 2031 ranging from around 60,300 in 2031 at a growth rate of 0.2% per annum under the labour supply scenario, to around 72,623 in 2031 at a growth rate of 1.4% under the Past Trends (15 years) scenario.
- 5.19 The Labour Demand scenario suggests an initial contraction in jobs to 2016 changing from a base of 58,797 in 2010 to 56,700 in 2016 before increases to 2031 including an additional 7,181 jobs over the second 15 year period considered. By 2031 there is a projected increase of 12,444 jobs from the 2010 base.
- 5.20 The Labour Demand scenario projects the largest growth in manufacturing with an additional 1,470 jobs within the sector forecast, the largest forecast growth across the four scenarios considered between 2010 and 2031. The past trend scenarios (both 15 year and 25 year) project a contraction within the manufacturing sector over the period. The Labour Demand scenario also projects relatively strong employment growth in a number of sectors including: land transport and warehousing and transportation support (distribution), and Business service activities including financial services, rental and letting activities, employment activities, building & landscape services, and office administration and other support.
- 5.21 The alternative forecast scenario (Experian) shows the most pronounced manufacturing contraction (-2,876 jobs to 2031) including specific decline in a number of sub-sectors between 2010 and 2031 including: food products, beverages, wood & wood related products, other non-metallic mineral products, fabricated metal products, and other machinery and equipment. The past trends (15 year and 25 years) scenarios showed similar but less pronounced contraction in most of these sub sectors over the period. The past trends (15 years) scenario also suggests significant growth potential within sectors including education, human health, residential care, social work based on historic changes in job numbers. This scenario suggests the largest potential increase in employment to 2031 including a potential additional 15,923 jobs from the 2010 base.
- 5.22 The labour supply scenario projects the smallest number of additional jobs to 2031 from the 2010 base, at 3,610. This is driven by a number of forecast trends including contraction in some public sector jobs including education, human health, residential care compared to growth in other scenarios. Further contraction is noted in sectors

including postal & courier activities, food & beverage services, telecommunications, computer and related activities, and retail trade under this scenario. The figures also suggest potential marginal growth in manufacturing, and a less pronounced growth in professional / business services compared to other scenarios.

Table 5.1 Summary of Employment Projections based on Economic Scenarios, by sector

	2010 Actual	2031				
		Labour Demand	Additional Forecast Scenario	Past Trends 15 Years	Past Trends 25 Years	Labour Supply Scenario
01 Agriculture / hunting etc	41	27	19	47	25	24
02 Forestry	2	1	1	2	1	1
08 Mining & quarrying	59	46	12	42	43	40
10 Manuf - food products	2002	3076	1618	1370	1425	2683
11 Manuf – beverages	1579	2426	1276	1080	1124	2116
13 Manuf – textiles	99	86	8	69	66	75
14 Manuf - wearing apparel	41	36	3	28	27	31
15 Manuf - leather & related products	13	11	1	9	9	10
16 Manuf – wood & wood products	217	161	33	150	224	140
17 Manuf - paper & paper products	47	35	7	33	49	30
18 Printing & reproduction of recorded media	148	271	121	91	86	237
20 Manuf – chemicals & chemical products	51	47	11	22	43	41
22 Manuf - rubber & plastic products	180	151	132	65	104	132
23 Manuf – other non-metallic mineral products	556	459	408	854	330	401
24 Manuf – basic metals	53	18	23	29	31	16
25 Manuf – fabricated metal products	750	772	323	517	524	673
26 Manuf - computer, electronic & optical products	174	113	96	143	229	99
27 Manuf - electrical equipment	28	14	15	17	34	12
28 Manuf – other machinery & equipment	2238	2005	1283	1688	2588	1748
29 Manuf - motor vehicles, trailers	420	369	394	823	977	322
30 Manuf – other transport equipment	129	126	121	397	126	110
31 Manuf - furniture	56	69	39	52	92	60
32 Manuf – other manufacturing	25	31	18	23	41	27
33 Repair & installation of machinery & equipment	428	383	300	323	495	334
35 Electricity, gas, steam & air conditioning supply	57	57	86	0	0	50
36 Water collection, treatment & supply	22	17	33	9	13	15

37 Sewerage	58	70	87	64	80	61
38 Waste collection, treatment & disposal	178	216	267	197	245	189
39 Other waste management services	73	89	110	81	100	77
41 Construction of buildings	417	424	379	474	433	370
42 Civil engineering	225	229	270	256	233	200
43 Specialised construction activities	1965	1998	2417	2232	2039	1743
45 Wholesale, retail & repair of motor vehicles	1553	1895	1853	1158	1489	1653
46 Wholesale trade	2373	2896	2832	1769	2275	2526
47 Retail trade	5388	5476	5270	5668	5658	4776
49 Land transport	1128	2009	1710	1546	1498	1752
52 Warehousing & transportation support activities	1413	2517	2142	1937	1877	2195
53 Postal & courier activities	874	730	1325	1613	1198	636
55 Accommodation	351	343	324	441	224	299
56 Food & beverage services	2884	2820	2665	3619	1840	2460
58 Publishing	65	119	57	40	38	104
59 Film, video and TV production & music publishing	73	89	60	81	100	77
61 Telecommunications	1131	944	1081	2087	1550	824
62 Computer & related activities	1022	883	1241	2558	1625	770
63 Information service activities	57	49	69	143	91	43
64 Financial services	575	668	637	601	513	583
65 Insurance & pension funding	9	12	9	4	4	11
66 Auxiliary financial services	228	265	253	238	203	231
68 Real estate activities	472	724	571	884	637	632
69 Legal & accounting activities	477	732	625	893	644	638
70 Head office & m'gmt consultancy activities	2425	3722	3180	4539	3274	3246
71 Architecture & engineering	706	1083	926	1322	953	945
72 Scientific research & development	64	98	84	120	86	86
73 Advertising & market research	45	69	59	84	61	60
74 Other professional, scientific & technical activities	85	130	111	159	115	114
75 Veterinary activities	87	98	109	120	111	86
77 Rental & leasing activities	349	655	396	640	457	571
78 Employment activities	2535	4759	2873	4649	3316	4151
79 Travel agencies & tour operators	97	182	110	178	127	159
80 Security & investigation activities	224	420	254	411	293	367
81 Building & landscape services	688	1292	780	1262	900	1126
82 Office administrative & other business support	495	929	561	908	648	810
84 Public administration & defence	1581	1845	1024	2075	1589	1609
85 Education	4579	4983	5382	6099	6872	4346
86 Human health activities	5876	6639	7363	8082	7498	5791
87 Residential care activities	1191	1346	1470	1638	1520	1174
88 Social work activities without accommodation	950	1073	1172	1307	1212	936

90 Creative, arts & entertainment activities	35	43	35	39	48	37
91 Libraries, archives, museums & other cultural activities	66	80	66	73	91	70
92 Gambling & betting activities	145	176	145	160	200	154
93 Sports activities & amusement & recreation activities	952	1156	952	1052	1310	1008
94 Activities of membership organisations	189	230	243	209	260	200
95 Repair of computers & personal/household goods	7	9	9	8	10	7
96 Other personal service activities	925	1123	1191	1022	1273	980
Total	56700	69144	61130	72623	65524	60310

Step 3: Employment and Land Categorisation

Create Appropriate Sector Groupings

- 5.23 The next step was to identify appropriate sector groupings for East Staffordshire, which reflects the local structure of the economy, and different land use types. This requires the selection and aggregation of the 41 CE sectors (reference Figure 5.1) and 58 BRES sectors (based on 2 digit SIC2007 sector codes) (reference Table 5.2) to develop a shortlist of 27 sector groupings, based on an analysis of sector size, growth and local concentrations / competitive advantages. It is important that there is a sufficient number of sector groups to provide an accurate representation of the local economy but should not be too disaggregated, particularly given the low levels of employment in some of the 2 digit SIC sectors at a borough level.
- 5.24 In general there are some clear groupings of activities including for example, combining manufacture of motor vehicles with manufacture of other transport equipment; grouping insurance, banking and financial services; grouping construction of buildings, civil engineering and specialised construction activities, etc.
- 5.25 Some 27 groups – 8 manufacturing groups and 19 service groups – were adopted for forecasting purposes. The groupings are set out in the table below, together with the corresponding CE industrial sectors and the 2 digit SIC categories for each. It should be noted that not all CE sectors and 2 digit SIC categories are included – primary agriculture and extractive industries are for example excluded since they do not directly give rise to demand for employment land. Furthermore, sectors where employment in East Staffordshire is low or non-existent have been excluded. In addition, employment in the following SIC categories was moderated to the following percentages of employment, which were assumed to give rise to demand for employment land:

- Utilities (Electricity, gas and water): 30% of employment is assumed to be in headquarters and other office premises;
- Construction: 33.3% of employment is assumed to be located in fixed employment premises;
- Buildings and landscape services: 30% of employment is assumed to be located in fixed employment premises;
- Education: 10% of employment is assumed to be in non-educational, mainly office premises; and
- Health and social work: 20% of employment is assumed to be in headquarters and other office premises.

Table 5.2: Selected Sector Groups and Corresponding CE and SIC Sectors

		SIC2007 Definition
M1	Food & Beverages	10, 11
M2	Wood & Paper Materials/Products	16, 17, 31
M3	Chemical, Plastic & Non-Metallic Materials/Products	20, 22, 23
M4	Metals & Metal Products	24, 25
M5	Electronics & Electrical Equipment	26, 27
M6	Mechanical Engineering	28, 33
M7	Motor Vehicles & Other Transport	29, 30
M8	Manufacturing nes	13, 14, 15, 32
S1	Utilities	35, 36, 37, 38, 39
S2	Construction	41, 42, 43
S3	Wholesale Distribution	46
S4	Wholesale, Retail and Repair of Motor Vehicles	45
S5	Retailing	47
S6	Land Transport	49, 52
S7	Post & Telecommunications	53, 61
S8	Accommodation & Food Service	55, 56
S9	Printing, Publishing & Media	18, 58, 59
S10	Insurance, Banking & Finance	64, 65, 66
S11	Computer & Information Services	62, 63
S12	Professional Services	68, 69, 70, 71, 72, 73, 74
S13	Building & Landscape Services	81
S14	Other Business Services	77, 78, 79, 80, 82
S15	Public Administration & Defence	84
S16	Education	85
S17	Health & Social Care	75, 86, 87, 88
S18	Recreational, Cultural & Sporting Activities	90, 91, 92, 93, 94
S19	Other Services	95, 96

Source: Cambridge Econometrics and GHK analysis, 2012

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- 5.26 Forecast employment change under each scenario was grouped into the 27 sector groups as identified in the previous table.

Match to Land Use Categories

- 5.27 This step goes on to allocate all or divide parts of these employment sector groups between the standard land use categories. These were allocated on the basis of professional judgement and experience of the consultancy team, but have remained as disaggregated as far as possible in order to narrow the range of the judgement to be made for any individual employment group or land use category. Thus the full breakdown of land use classes (e.g. A1, A2a,b,c, etc., A3, B1a,b,c, etc., B2, B8, C1) is used together with the 27 sector groups. Where an employment group is allocated to more than one land use class, the percentage of employment assumed to be in each land use class has been identified. Wherever possible this has been determined using more detailed BRES data for 2010 at up to the 5 digit SIC sub-classes to determine the proportions of employees in each relevant sub-sector, for example to reflect the split between employment in accommodation and employment in food and beverage service sectors for the study area.
- 5.28 Appendix 6 shows how the 27 sectors and the proportion of employment in each sector are allocated to the different land use categories. All further aggregations of employment, floorspace and employment land use categories are based on the disaggregation.

Step 4: Employment Densities and Floorspace Requirements

- 5.29 Employment densities are a key link between employment change and land use, and need to be applied in the model to convert the employment forecasts to floorspace requirements. The employment densities in the model have been amended and updated for this study to ensure consistency with the 2010 Employment Densities Guide (2nd Edition), developed by Drivers Jonas Deloitte on behalf of the Homes and Communities Agency (HCA). The densities cited in the guide are the most up to date and the most disaggregated and therefore adaptable for use in the disaggregated model form adopted for this study.
- 5.30 Some of the employment densities are provided in terms of net internal area (NIA) and these have been converted to gross internal area (GIA) using conversion factors based upon the guidance in the 2010 Employment Densities Guide and the consultancy teams previous experience. For A1, A2, A3, B1a and C1 use classes, the NIA is assumed to equate to 80% of the GIA, while an equivalent figure of 90% has been assumed for B1b and B1c use classes. These employment density assumptions are summarised in the table below.

5.31 It should also be noted that the GIA floorspaces per worker have then been converted to gross external rates by increasing all business and industrial classes (B1 and B2) by +3.5% and increasing all shops, financial and professional services, hotels and catering premises (A1, A2, A3 and C1) by +10%), whilst the densities for storage and distribution (B8) have remained unchanged.

Table 5.3: Employment Densities Adopted for East Staffordshire Sectors

Activity	Sector Group	Land Use Category	Net Internal Density (sq.s / worker)	Gross Internal Density (sq.m / worker)
Manufacturing	General & Specialist Manufacturing M1, M2, M3, M4, M6, M8, S9	B2		36
	Electronics & Electrical Equipment: M5	B1c	47	52
	Transport Equipment: M7	B2		36
Logistics & Distribution	Land Transport: S6	B8		80
	Wholesale Distribution / Transport & Communications: S3, S6, S7	B8		70
Automotive	Wholesale, Retail and Repair of Motor Vehicles: S4	B2		36
Offices	Various S1, S2, S5, S9, S10, S11, S13, S14, S15, S16, S17	B1a	12	15
	Professional Services: S12	B1b	47	52
Retail	Retail Shops / Computer Services: S5, S11	A1	19	24
	Insurance, Banking & Finance: S10	A2a	16	20
	Retailing / Computing / Professional Services: S5, S11, S12	A2a/b	16	20
	Recreational, Cultural, Sporting & Other Services: S18, S19	A2c	16	20
	Accommodation & Food Service: S8	A3 / C1	18	23

Source: HCA 2010, GHK analysis, 2012

5.32 The density assumptions used in the model are based on current worker / floorspace densities. There are factors impacting on future employment densities which may move towards lower overall densities or less reliance upon traditional forms of employment floorspace to meet economic needs. This study has not made adjustments for such changes because we believe it is better to use consistent and well understood national estimates for long term forecasting whilst recognising that these should be monitored.

5.33 These employment densities have been applied in each sector and land use category using the transformation model developed by the consultancy team and the resulting estimates of floorspace requirements for 2031 are summarised in Table 5.4.

Table 5.4 East Staffordshire Floorspace Requirements by Land Use Class (sq m): Total Requirement to 2031 and Change in Requirement 2010 – 2031, by Scenario

	Total Floorspace Requirement 2031				
	Labour Demand	Additional Forecast Scenario	Past Trends 15 Years	Past Trends 25 Years	Labour Supply Scenario
A1	50,117	49,311	56,411	53,747	43,712
A2	172,246	162,395	195,532	181,025	150,232
A3	70,472	66,591	90,435	45,976	61,465
B1a	299,612	238,988	334,545	264,288	261,319
B1b	17,726	15,014	21,662	15,594	15,461
B1c	6,865	6,005	8,682	14,240	5,898
B2	466,351	299,351	329,750	370,066	406,747
B8	657,065	653,578	642,272	603,020	573,086
C1	7,830	7,399	10,048	5,108	6,829
Total	1,748,284	1,498,632	1,689,337	1,553,064	1,524,749
	Absolute Change in Floorspace Requirement 2010 – 2031				
	Labour Demand	Additional Forecast Scenario	Past Trends 15 Years	Past Trends 25 Years	Labour Supply Scenario
A1	382	-424	6,672	4,013	-6,023
A2	29,196	19,345	52,482	37,975	7,182
A3	-1,588	-5,469	18,376	-26,084	-10,595
B1a	84,208	23,584	119,140	48,884	45,915
B1b	6,176	3,464	10,071	4,044	3,910
B1c	-4,053	-4,913	-2,236	3,322	-4,930
B2	69,476	-97,524	-67,125	-26,809	9,872
B8	161,300	157,813	146,507	107,256	77,321
C1	-176	-608	2,042	-2,898	-1,177
Total	344,921	92,269	285,929	149,703	121,475

Source: GHK analysis, 2012

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- 5.34 The previous table summarises the floorspace requirements for each scenario in 2031 and the change between 2010 and 2031. As with the employment projections, the additional forecast scenario results in the smallest changes in overall floorspace requirements of 92,269 sq m. Larger requirements are noted against the shorter term (15 year) past trend and baseline scenarios are noted with 285,929 sq m and 344,921 sq m identified respectively.
- 5.35 The scenarios all concur that the largest increases in demand will be for office (B1a) and warehousing (B8) floorspace, with varying position on other use classes. The biggest disparity between the scenarios relates to B2 activities, with the baseline scenario and labour supply scenario both suggesting positive floorspace requirements whilst the past trend scenarios and the additional forecast scenario all suggest negative floorspace requirements.

Step 5: Forecasting Land Requirements

- 5.36 This section details how we have converted the estimates of floorspace required in Table 5.5 previously into estimates of land.

Churn / Leakage

Churn

- 5.37 Employment driven floorspace demand is likely to be a significant driver of the demand for additional floorspace in a local economy. However, it is also true that an element of demand will arise from companies moving, either due to obsolescence of their existing property, the desire for a lower or higher cost location, or simply for strategic reasons. Land can also be lost from employment use for alternative uses through the granting of planning permission. Furthermore, the regeneration process will give rise to business relocations which creates further demand for employment land.
- 5.38 This form of demand is called 'churn' and it represents a general level of turnover in property requirements. Churn can have a significant effect on the amount of employment land and floorspace that is required in order to meet the predicted demand. The basis of calculating churn is to look at the existing amount of stock in the borough. We have the most up to date information available from the Valuation Office Agency which is currently from 2013 and has been presented previously within this report.
- 5.39 Estimating churn and its relationship to employment driven demand is not straightforward. Both employment churn and property churn factors are drivers of demand for business floorspace. For example, premises that are vacated by declining sectors can, subject to planning and suitability, be occupied by expanding sectors.

Using experience from previous studies, GVA has established a set of assumptions regarding the level of churn for different land use classes. It is assumed that 1% churn factor should be applied across all B use classes. These assumptions have then applied to the stock figures presented previously.

- 5.40 As can be seen in the following table, the effect of churn in creating additional demand to be added to that coming directly from the model is approximately 120ha over 21 years (2010 to 2031).

Table 5.6: Overall Effects of Churn

Bulk Class	Land Use Designation	Floorspace (m2)	Churn (floorspace sq m / year)	Churn (Land ha / year)	21 Years Churn (Land ha)
Offices	B1	154,000	1540	0.47	9.95
Factories/Warehouses	B2/B8	1,632,000	16,300	5.02	105.5
	Total	1,786,000	17,840	5.49	115.45

Source: VOA, 2013, GVA analysis 2013

NB: within the analysis the B2/B8 churn requirement is split 50/50 between the B1b/B2 and B8 land use requirements in the absence of a detailed split within this data from VOA.

Leakage

- 5.41 We have also considered the effect of leakage from employment areas to other employment locations such as town centres and other places not classified as employment land. This includes in local centres, above shops, and within residential properties. Leakage has a more noticeable effect on the demand for office space, simply because offices can be located in a wider range of locations, not just recognised employment areas.
- 5.42 In terms of offices, we have assumed that 60% of office jobs are likely to locate on employment sites and that the remaining 40% are likely to locate elsewhere within East Staffordshire. Of the 40% we have assumed that the majority of this will be located within Burton-upon-Trent town centre, with the remainder in Uttoxeter town centre. In coming to this view we have been guided by existing activity, market perceptions, and forward strategy relating to development in East Staffordshire.
- 5.43 For industrial and distribution type premises, the amount of leakage is much lower and the situation slightly less complex. Industrial and distribution developments have a much stronger reliance on allocated employment land, and therefore, in line with assumptions we have used in previous studies, we assume that for industrial demand, a general leakage figure of 10% will apply.

- 5.44 This is reflective of the fact that it is unlikely that any new development in the B2/B8 use classes would be on non-employment land and is more likely to be on designated employment sites and takes account of the fact that some B8 storage uses can be accommodated in existing redundant buildings that were formerly used as factories.

Plot Ratios

- 5.45 The amount of floorspace that is built per net hectare is an important factor to consider when calculating employment land requirements. We have used experience from undertaking other ELRs and referred to the guidance to ascertain the average amount of floorspace being built per hectare. This enables floorspace requirements (sq m) to be converted into estimates of employment land (ha).
- 5.46 The following table summarises the average plot ratios we have used for this study. These are in line with the guidance on plot ratios as set out in Box D.7 of the ELR guidance.

Table 5.7: Plot Ratio Assumptions

Land Use Class	Average Plot Ratio
B1a / B1b	32.5%(i.e. 32.5% of 1 ha will be taken up with B1a/B1b floorspace, the remainder will be e.g. car parking, landscaping)
B1c / B2	35%
B8	40%

Source: GVA analysis, 2012

Completions of Employment Land

- 5.47 The demand forecasts prepared relate to the period 2010 to 2031. Analysis of recent completion rates presented in a previous section of this report suggests take up of employment land in 2010/11 was just 0.03 hectares. Given the small nature of this take up and the need to disaggregate across the sectors, we have not netted this off overall demand.

6. Forecasts of Future Employment Land Demand

6.1 This section details the demand forecast based on the scenarios and assumptions detailed in the previous section. We have presented demand forecasts for each scenario, in terms of floorspace (Sq m) and land (Ha) requirements.

Establishing a Preferred Scenario

6.2 The five scenarios considered present a range of land requirements to 2031, as summarised within the table below. Importantly these scenarios each present an alternative picture as to the shape of the East Staffordshire economy to 2031 which needs to be considered before a preferred scenario can be identified.

Table 6.1: Comparison of Floorspace (Sqm) and Land Requirements (Ha)

	B1a/b	B1c / B2	B8	Total
Floorspace (Sqm)				
Labour Demand (Cambridge)	90,384	65,423	161,300	317,107
Additional Forecast (Experian)	27,047	-102,436	157,813	82,424
Past Trend Scenario (15 years)	129,211	-69,361	146,507	206,357
Past Trend Scenario (25 years)	52,928	-23,487	107,256	136,697
Labour Supply	49,825	4,942	77,321	132,088
Land (Ha) (Including churn and leakage assumptions)				
Labour Demand (Cambridge)	22.657	64.277	83.746	170.679
Additional Forecast (Experian)	10.964	21.113	82.961	115.038
Past Trend Scenario (15 years)	29.825	29.618	80.418	139.86
Past Trend Scenario (25 years)	15.742	41.414	71.586	128.742
Labour Supply	15.169	48.724	64.851	128.744

Source: GVA analysis, 2012

6.3 The land requirements under the five scenarios range from between 115ha to 171ha to 2031. As noted previously these alternative land requirements are underpinned by differing levels of employment envisaged by sector under each model considered. The headlines of this analysis are summarised below.

- **Labour Demand:** Significant employment growth noted in sectors including manufacturing (+1,467 jobs, including noted growth in manufacture of food products, beverages, printing and reproduction of recorded media); significant employment growth in wholesale, land transport, warehousing and transportation support activities (logistics / warehouse and distribution activities) (+2,850 jobs);

significant employment growth in Business, Professional and Financial Services⁴ (+6,140 jobs).

- Additional forecast: Contraction within manufacturing (-2,876) including decline noted across all sub-sectors, most pronounced within food products, beverages, wood and wood products, other non-metallic mineral products, fabricated metal products, and other machinery and equipment; growth within distribution and logistics sectors including wholesale activities, land transport, warehousing and transportation, but less pronounced than within the previous scenario (+2,079); and forecast employment growth in BPFS sectors, although again less pronounced than within the previous scenario (+2,208).
- Past trend (15 years): Contraction of employment within manufacturing, although less pronounced than within the previous scenario (-1,346), although some growth is forecast within specific manufacturing sub-sectors including other non-metallic mineral products (+248), motor vehicles, trailers (+403), other transport equipment (+268); contraction within wholesale activities (-799), but growth in land transport (+418) and warehousing and transportation support activities (+524); significant growth within BPFS (+9,073), the largest of any of the scenarios set out, including growth within head office and management consultancy advice (+2,000), and employment activities (+2,000).
- Past trend (25 years): Contraction of employment within manufacturing albeit more marginally than within other scenarios (-677), and with some expansion of sub-sectors including other machinery and equipment (+350), and motor vehicles and trailers (+557); contraction within wholesale activities (-112), but growth in land transport (+370), and warehousing and support activities (+464); growth in BPFS although not as pronounced as within the 15 year trend scenario (+3,418).
- Labour supply: Marginal expansion of manufacturing (+157), with more pronounced growth in sub-sectors including food products (+681) and beverages (+537), with contraction in most other sub-sectors; expansion in wholesale, retail and repair of motor vehicles (+100), wholesale trade (+153), land transport (+624), and warehousing and transportation support activities (+782); expansion of BPFS (+3,989) including significant growth in head office and management consulting activities (+821), and employment activities (+1,616).

6.4 It can therefore be concluded that under each scenario there are some commonalities, including general expansion of warehousing / distribution activities, and

⁴ NB: defined to include the following sectors: Computers & related activities; Information service activities; Finance services; Insurance and pension funding; Auxiliary financial services; Real estate activities; Legal and accounting activities; Head office & management consultancy activities; Architecture & engineering; Scientific research & development; Advertising & market research; Other professional, scientific & technical activities; Veterinary activities; Renting & leasing activities; Employment activities; Travel agencies & tour operators; Security & investigation activities; Building & landscape services; and Office administrative & other business support.

Business, Professional and Financial Services, but to varying extents, and little consistency in how manufacturing is expected to change over the plan period.

6.5 The various scenarios have been considered further in terms of their appropriateness / confidence levels in the following paragraphs, before conclusions are drawn as to the likely scale and nature of economic change likely to take place across East Staffordshire.

Past Economic Trends

6.6 Both the Cambridge Econometrics and Experian datasets considered as part of this analysis include historical data on economic change. A comparison of these two datasets, for the period 1997 to 2012 (Experian data is available from 1997 onwards), is summarised in the table below, focusing on key sectors.

Table 6.2: Employment Change (Proportions) by Sector 1997 – 2012, Cambridge Econometrics / Experian Comparison

	Cambridge Econometrics	Experian Business Strategies
Manufacturing	-29.7%	-21.2%
Distribution	4.3%*	38.8%**
Banking and Finance / Insurance	-11.1%***	-14.6%****
Other Professional Services	112.4%*****	66.3%*****

** Distribution, Land Transport etc, ** Transport and Storage, *** Banking & Finance, Insurance, **** Finance & Insurance, ***** Computing Services, Professional Services, Other Business Services, ***** Professional & Other Private Services*

6.7 The following table sets out the change in employment across East Staffordshire over the period 1998 and 2011, using data obtained from the Annual Business Inquiry (ABI) / Business Register and Employment Survey (BRES).

Table 6.3: Employment Change by Sector 1998 – 2011, ABI / BRES

	1998	2011	Change in Employment 98-11
Manufacturing	12931	9417	-27.2%
Transport / Storage & Communications	2515	3443*	36.9%
Financial Intermediation	820	704**	-14.1%
Real Estate, Renting and Business Activities	5039	8,664***	71.9%

** Defined in 2011 as Transport & Storage, ** Defined in 2011 as Finance and Insurance activities, *** Defined in 2011 as Real Estate activities, Professional, scientific and technical activities and Administrative & support services activities*

- 6.8 Analysis of employment change recorded through the ABI / BRES shows a strong alignment with the figures within the Experian model, but suggests less synergy with the Cambridge model.
- 6.9 They support the position that over the last 10 years the manufacturing sector has, at headline level, contracted within the East Staffordshire economy, and that growth in professional services has been in activities outside of the financial sub-sectors.

Commercial Market Drivers

- 6.10 It is important to consider the potential nature and extent of economic change across East Staffordshire forecast within each of the models presented in the context of the commercial market.
- 6.11 A number of key considerations are relevant in relation to the commercial market analysis undertaken as part of this ELR exercise, including those concerned with the drivers of the industrial / distribution and office markets respectively. These drivers, or attributes, underpin occupier decision making processes and are therefore strongly aligned to inward investment performance.
- 6.12 It is generally accepted that the requirements driving inward investment decisions include those listed in the bullet points below:
 - Labour pool: Including proximity and access to a labour pool of scale, mobility, benefiting from a range of skills, diversity, and competitive cost;
 - Accessibility: ease of access by road, rail, bus, airport, port, etc;
 - Amenity and infrastructure: including supporting services and landscape and visual to already be in place or be of sufficient quality;

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- Competitors / clustering: nearby presence of existing clusters of relevant activities and/or anchor tenant and/ or supply chains;
 - Credibility of scheme / developer and/or deliverability of the site: sites and schemes considered to be realistically and reliably deliverable;
 - Environmental and sustainability credentials: including environmental benefits of buildings / premises available, in addition to public transport provision and connectivity;
 - Grants / financial incentives: the availability of grants and financial incentives within a specific location; and
 - Cost: including direct property costs, and cost per desk occupied.
- 6.13 It is outside of the parameters to consider in detail the inward investment strategy for East Staffordshire, but it is relevant to consider the extent to which the forecast employment change is realistic in the context of the commercial markets operating across the area.
- 6.14 The commercial market analysis undertaken identified some key drivers relating to industrial and distribution investment in East Staffordshire, including primarily the location of the borough and strategic road infrastructure connecting it to the regional and national markets. This includes good connectivity to the M1 and M6 motorways, and to north Birmingham via the A38. The success of business parks including Centrum 100 and Centre 38 reflect this, with their positioning as strategic locations in a regional context.
- 6.15 There is continued opportunity for this market within the area, with land remaining at key locations offering further opportunity for development. This supports an assumption of continued growth within this sector over the plan period, noted across all of the models considered within the demand analysis.
- 6.16 The position regarding the office market is much less clear from the analysis undertaken. The models within the demand analysis present an uncertain picture of how this sector will change within East Staffordshire, albeit all do suggest a growing market.
- 6.17 The analysis of the office market suggests a more localised demand than some of these growth figures imply. The analysis specifically notes:
- The regional office market is dominated by Birmingham city centre with all other locations considered to be secondary;
-

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- Agency perspectives of East Staffordshire as serving a local office market, focused primarily at Centrum 100 and within Burton town centre, with demand focused on smaller units sized between 2,000 and 3,000 sq ft; and
 - Transactional evidence supports this assumption of the majority of office market activity being of smaller scale including the majority of transactions being in premises sized below 2,000 sqft.
- 6.18 The drivers of the office market are more difficult to determine in the area, with demand in Burton town centre likely linked to the amenity associated with this location albeit this is not linked to strategic drivers such as mainline rail connectivity, and that at Centrum 100 linked to the strategic road infrastructure and connectivity of the area.
- 6.19 There is limited evidence identified to suggest that the office market is going to grow significantly over the plan period associated with the drivers identified. This brings into question the more optimistic models suggesting significant growth within the office sector, with very little sense from the analysis undertaken of commercial market indicators that East Staffordshire's positioning as an office location will change over the plan period.
- 6.20 The East Staffordshire Office Market Report (2009) recognised this lack of office market, and identified the potential to create a 'new' functioning market, although recognised that this is not straightforward, and is not a case of 'build and they will come'. It recognised development opportunities within the town centre which could include an office component although noted that the majority of sites are not practically deliverable for office use.
- 6.21 In the current economic and commercial climate, where development of this kind in even prime established market locations is difficult to make viable, it is perceived that Burton is unlikely to experience a significant uplift in office market appeal or demand.

Alignment with Strategy and Aspiration

- 6.22 Strategic economic aspirations influencing activity at local authority level are largely determined by LEPs in the absence of the former Regional Development Agencies. East Staffordshire sits within the Greater Birmingham and Solihull LEP, but is clearly linked / influenced by the strategies in place within the Stoke-on-Trent & Staffordshire, and the Derby-Derbyshire-Nottingham-Nottinghamshire (D2N2) LEP areas.
- 6.23 The sector focus identified by each of the LEPs provides important context for the forecast analysis within this ELR report, as noted within Section 2 of this report.
- 6.24 Although the Greater Birmingham & Solihull LEP identifies BPFS, ICT and Creative and digital sectors, it is noted that there is an intention to focus this growth on the

Birmingham area, with likely little impact on the secondary centres across the area, including Burton-upon-Trent.

- 6.25 There is little support identified within the review of strategic documents to support an assumption of significant growth within office sectors within East Staffordshire, including focus on areas with competitive advantage / clear and apparent market drivers / established prime markets.
- 6.26 The NPPF takes a positive stance regarding economic growth and requires that "...every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth" (Core Planning Principles, para 17). It includes recognition of the need to ensure that the right type of land is available in the right places at the right time to support growth and innovation, and that planning should operate to encourage and not as an impediment to sustainable growth including the need to support economic growth through the planning system.
- 6.27 This national policy context specifically draws into question the appropriateness of planning for future economic growth using a model which is constrained by labour supply, as in the case of one of the models considered herein.

'Project-on' Comparison

- 6.28 In order to benchmark the various models of growth considered a calculation has been undertaken to estimate the potential employment yield from the following commitments:
- Extant planning permissions / schemes under construction (monitored by the Council for the period 2011/12);
 - Committed sites (monitored by the Council for the period 2011/12);
 - Available floorspace (sourced from Focus, as of January 2013); and
 - B Use Class floorspace yield of key projects (Bargates Regeneration).
- 6.29 The application of standard plot ratios and employment densities in line with those applied previously in the ELR results in the following potential gross employment yields from these existing commitments:

Table 6.4: Estimated Gross Employment Yield from Committed Projects (Jan 2013)

Source	Gross Job Yield
Extant Planning Permissions / Sites Under Construction	6,441
Extant Planning Permissions / Sites Under Construction including Committed Sites	9,211
Available Floorspace (Marketed as of Jan 2013)	3,147
Identified Projects	312
Total (Excluding Committed Sites)	9,900
Total (Including Committed Sites)	12,670

- 6.30 These gross job numbers are translated to net through the application of leakage (25%, medium assumption) and displacement (50%, medium assumption) assumptions in line with the latest English Partnerships Additionality Guidance (2008)⁵. The net job numbers are summarised in the table below:

Table 6.5: Estimated Net Employment Yield from Committed Projects (Jan 2013)

Source	Net Job Yield
Extant Planning Permissions / Sites Under Construction	2,415
Extant Planning Permissions / Sites Under Construction including Committed Sites	3,454
Available Floorspace (Marketed as of Jan 2013)	1,180
Identified Projects	117
Total (Excluding Committed Sites)	3,712
Total (Including Committed Sites)	4,751

- 6.31 Whilst only a crude calculation, these estimated committed job numbers provide an interesting comparison with the job outputs associated with the demand models presented previously. Specifically, the figures suggest that the job outputs associated with the Experian (4,430) and Labour Supply (3,610) models are under-estimates of the economic potential within the area. This remains true even if a 10% churn / vacancy assumption is applied to the figures, resulting in total of 4,276 committed jobs.

⁵ NB: Substitution and multiplier effects have not been considered as are felt to be inappropriate in this context. All calculations are included within Appendix 7.

Labour Force Considerations

- 6.32 Whilst the NPPF is clear in requiring that economic growth aspirations are not constrained by factors including population, it is relevant to consider the potential labour force implications of the demand models presented, including potential implications for commuting levels.
- 6.33 Data presented previously within this report supports the assumption that East Staffordshire is currently a net importer of labour, with key in-commuting from South Derbyshire and Derby.
- 6.34 Population projections are available from the ONS for the period 2011 to 2021, applying the level of change forecast over this period to the period to 2031 results in an estimated increase in people of working age (16-64 years) of 5,085 between 2012 and 2031. The 2011 Census recorded an economic activity rate of 70.4% for East Staffordshire, which when applied to this population figure results in a projected increase in economically active working age population within East Staffordshire of 3,580 people by 2031.
- 6.35 As with the previous calculation of employment yield from committed schemes, it is recognised that this is a crude calculation, however, it does highlight the vulnerabilities of some of the larger employment estimates emerging from the demand models including specifically the Cambridge and 15-year historic trends analysis. This is particularly relevant in the context of ambitions to reduce out-commuting from Derby and South Derbyshire.

Conclusions

- 6.36 On the basis of the benchmarking analysis undertaken, it is clear that there are varying degrees of confidence in each of the five scenarios considered. The most confidence is established for the Experian Business Strategies forecast, although concerns remain regarding the treatment of manufacturing sectors across all of the models.
- 6.37 In each case there is a suggestion that the manufacturing sector will decline, but this seems to ignore sub-sector strengths in East Staffordshire and the nature of the local economy including a localised strong market and key local employers with supply chain / market spin off potential. This primarily relates to the forecast contraction in the Experian model associated with the following sub-sectors:
- Manufacture of coke and refined petroleum products;
 - Manufacture of chemicals and chemical products, basic pharmaceutical products; and pharmaceutical preparation – it is noted that since Clinigen has moved to East Staffordshire there has been a growth within the supply chain with a

number of pharmaceutical suppliers around Centrum and warehouses on Stretton business park;

- Manufacture of computer, electronic and optical products;
- Manufacture of electrical equipment, machinery and equipment not elsewhere classified; and
- Manufacture of motor vehicles, trailers and semi trailers, and other transport equipment – it is noted that whilst employment at Toyota fluctuates, suppliers including Futaba continue to recruit locally, alongside smaller companies benefitting from LEP funding for business growth.

6.38 If forecast decline within these sectors is removed, i.e. a ‘held’ position is forecast from the 2012 base, without applying any additional growth in these sectors, an additional 1,298 jobs are identified / safeguarded in the economy, changing associated land requirements generated from this model as a result, relating primarily to the B1c/B2 market.

6.39 This could generate the need for circa 13ha more B1c/B2 land by 2031 than presented previously in the Experian model, equating to a total minimum land requirement of 128ha rather than 115ha by 2031.

6.40 These figures are a baseline econometric forecast and do not take into account the need to provide an offer to attract potential inward investment into the area over and above that forecast.

Table 6.6: Adjusted Preferred Scenario (Experian) Land Requirements (Ha)

Use Class	2010	2011	2016	2021	2026	2031
B1a/B1b		0.847	3.444	6.359	8.545	10.964
B1c/B2		-1.318	6.930	15.267	23.211	33.939
B8		-0.836	24.846	44.691	62.631	82.961
Total		-1.307	35.220	66.317	94.386	127.864

7. Supply / Demand Dynamics and Recommendations

7.1 The original ELR report drew a series of conclusions regarding the sufficiency and adequacy of employment land provision across East Staffordshire. Key conclusions included:

- Site supply was identified to be 123ha, compared to a 100ha requirement identified within the study;
- Burton is the economic heart of East Staffordshire and is likely to require the majority of employment land up to 2026;
- Around 93ha of the development sites identified in the study are located in or around Burton, with concerns noted around two sites (82 and SAI 204) due to ground condition and flood risk, which if removed from the supply would reduce it by 27.6ha and leave a dominance of smaller plots of land;
- Around 34.5ha was identified in the ELR for release from employment uses and/or was identified in the draft SHLAA;
- On the basis of the removal of sites for residential development and concerns around ground conditions / flooding, the ELR identified a shortage of land supply to meet future employment needs, with a specific shortage of land located within Burton; and
- A need to identify additional, deliverable development sites with close proximity and access to the junctions with the A38 immediately to the south and north of Burton, sized at least 2-6ha (dependent on proposed use), and provide at least 30ha of net development land in total.

7.2 The update to the ELR has reconsidered the current supply of employment land across East Staffordshire, relative to land requirements over the plan period, to 2031. There are some key distinctions to the analysis undertaken as part the updated ELR from the original piece of work. These are summarised below:

- Changes in planning policy: There have been fundamental changes to national and regional planning policy since the undertaking of the original ELR. The Coalition Government abolished Regional Spatial Strategies, and introduced a National Planning Policy Framework. Whilst the 2004 Employment Land Review Guidance Note remains the only established detailed guidance on undertaking ELRs, the removal of RSS also resulted in the disappearance of regional land requirements (disaggregated to local authority level), and the introduction of the NPPF in new considerations when planning for economic development including specific need

for business engagement, and to consider the likelihood of delivery of land allocations.

- Recent historic and current economic climate: the UK has experienced periods of recession since the undertaking of the original ELR. The economy and commercial markets remain constrained by the availability of finance. Generally, it is noted that fewer occupiers are making investment decisions including relocation within this climate, with a resulting slow down in new space being taken up and developed. The latest economic forecasts suggest recovery over the coming years, albeit a slow recovery in many places. The latest econometric forecasts (Experian, Q3 2012) suggest that the East Staffordshire economy will recover to 2006 levels by 2017/18, generally in line with the national trend.
- Updated land supply position: there have been changes to the land supply position since the previous ELR, including development having taken place, and planning permissions granted (for employment and non-employment uses).

7.3 The updated ELR has considered alternative models to calculate potential employment land requirements over the plan period, including:

- Labour Demand (Cambridge Econometrics)
- Alternative Labour Demand (Experian Business Strategies)
- 15-Year Past Trend
- 25-Year Past Trend
- Labour Supply Model

7.4 The analysis has concluded that the most appropriate model considered for East Staffordshire is the Alternative Labour Demand (Experian Business Strategies), albeit the analysis identified the need for some modifications of the forecast employment change even within this model to ensure maximum confidence in the numbers generated. The modifications specifically relate to the need to reflect local strengths within the economy within manufacturing sub-sectors. To this end, forecast contraction within key sub-sectors has been 'held' including within the following:

- Manufacture of coke and refined petroleum products
- Manufacture of chemicals and chemical products, basic pharmaceutical products; and pharmaceutical preparation
- Manufacture of computer, electronic and optical products
- manufacture of electrical equipment, machinery and equipment not elsewhere classified

- Manufacture of motor vehicles, trailers and semi-trailers, and other transport equipment

7.5 This model of greatest confidence (modified Alternative Labour Demand) identifies a land requirement of just under 128ha to 2031, including a buffer for choice and churn. This is compared to an identified land supply of circa 108 hectares over the plan period.

7.6 Breaking this land demand and supply position down by type, the following conclusions are drawn within the analysis:

- There is a relative balance of land supply within the B1a/b sectors (predominantly office uses) including demand of around 11ha compared to identified supply of 19.5ha;
- There is a general balance of B1c/B2 land over the plan period, with the requirement noted to be 33ha compared to a supply of 34ha; and
- A potential undersupply of B8 land over the plan period, with the requirement noted to be 83 ha compared to a land supply of 53ha.

Table 7.1: Comparison of Land Supply and Demand (Ha)

	Demand	Supply
B1a/b	10.964	19.5
B1c/B2	33.939	34
B8	82.961	53

7.7 The following recommendations are made on the basis of the analysis undertaken.

Office Sites

7.8 The analysis has not found sufficient evidence to support the identification of additional land supply for office development across East Staffordshire. Indeed the headline figures suggest potential oversupply of office development land over the plan period. This is further exacerbated by headline figures around marketed office floorspace including, for example, some 37,600sqm office accommodation currently marketed in Burton upon Trent alone.

7.9 However, this headline level analysis does not take into account more specific evidence associated with the nature of this supply.

7.10 Taking land availability first, the 19.5ha is concentrated across 6 sites, 4 of which are sized below 1ha. Sites 27 and 29, totalling 0.48ha are located within the Derby Road corridor and are likely to come forward as part of the mixed use regeneration of the

area. The extent of office development within this corridor will be subject to market demand and viability as part of the scheme development.

- 7.11 Site 67a, totalling 0.3ha, is noted to be expansion land for Health Care at Home – and therefore not likely to come forward as marketable office accommodation. Outside of these smaller sites, supply is concentrated in two locations, 2ha at Centrum East (Site 80), an established business location, and 15.8ha within a Greenfield site at Derby Road, Uttoxeter (Site 170). Both sites are noted to have good quality, with Site 170 slightly more uncertain given potential environmental constraints. It is likely, and it would be supported through this evidence base, that not all of the 15.8ha would come forward for B1a development in this area.
- 7.12 Analysis of the available office floorspace currently being marketed across Burton upon Trent and Uttoxeter supports the need for some development land across the authority area to facilitate business growth over the plan period. Of the 37,600sqm office accommodation available and marketed in Burton upon Trent, it is notable that 16,644sqm has been marketed for over a year with some marketed for over 5 years. Only 6,789sqm of that marketed is new office space with 2,008sqm not stated. Given this information, the quality of the available floorspace is questioned, especially in terms of emerging business needs over the plan period and the suitability of this supply in that context.
- 7.13 It is noted that there are distinctions within the office market within East Staffordshire, which is limited beyond indigenous business activity. Specifically this relates to the demand for floorspace within Burton and Uttoxeter, and that which is focused on out-of-centre locations including development along the A38.
- 7.14 The identified office land supply across the authority area is noted to offer choice to occupiers including in-centre and out-of-centre sites available. In this context the potential role of both site 80 and 170 is noted to be important over the plan period, in addition to that supply which is already available across Burton upon Trent and Uttoxeter. In addition, the ELR update notes the potential for mixed use development on sites in Burton specifically, including on sites owned by Coors which could include commercial office development, subject to market demand and viability.

General Industrial Sites

- 7.15 The analysis has identified a potential shortfall in land suitable for general industrial and business use over the plan period, of around 4 hectares. Demand within this sector is generally considered to be indigenous, and be focused around existing employment areas including Burton, Uttoxeter, and the A38 and A50 corridors.

- 7.16 Whilst there is a noted potential undersupply, the extent of existing (i.e. developed) land falling within the general (B1b/c) classification is significant across East Staffordshire. This includes 46 sites accommodating 148 hectares of land.
- 7.17 The ELR update concludes that the potential shortfall in general business employment land could be met over the plan period by the intensification and re-use of existing employment sites. This is in recognition of a number of the existing sites being identified to be of 'good' quality and market demand within the site assessment exercise, including 76ha of land in 23 sites.
- 7.18 The sites falling into this category are listed in the table below. The ELR Update does not conclude that all of these sites will be redeveloped or intensified over the plan period, but does recognise that these sites may present this opportunity if sufficient market demand emerges.

Table 7.1: Good quality existing employment sites

Site	Site Name	Hectares
2	Stretton Business Park	9.3
5	Rumenco/Pentagon Derby Road	4.9
6	Ryknild Industrial Estate, Derby Road.	2.6
9	Bridge Park, Derby Road	0.3
45	Maltings, Wetmore Road.	1.2
47	Hodges, Horninglow Street.	1.2
49c	Mosley Street industrial estate/ Kerry Foods/ Burton Beer Mats.	5.2
49d	Park Street industrial estate.	5.7
49e	James Properties, Wood Street.	0.3
54	Briggs, Derby Road	2
55	Global Brands distribution centre	2
56	Midland Grain Warehouse	2
58	The Curzon Street Business Centre.	0.6
59	Green Line Business Park, Wellington Street.	0.4
91	Anglesey House and Industrial Estate, Anglesey Road.	5.4
101A	Rylands Farm Industrial Estate and Gray Car Business Park.	10.22
101B	Land North of Graycar Business Park	2.3
102	Land opposite Barton Business Park	0.7818
104	Hawley's, Ferroli Etc, Lichfield Road.	1.864
134	Ash Acres Industrial Park near Draycott in the Clay.	0.8
140	Alpha Polish and Anodising	0.4
174	Dovefields	14.1
176	Brookside	2.4

- 7.19 The general business development considered at Twin Rivers Business Park is not identified to be required to meet general demand over the plan period, but rather

should be justified on the basis of spin-out potential from the leisure and sports development proposed at the site.

Distribution Sites

- 7.20 The distribution market is strongly linked to the A38 and A50 corridors, around which demand has traditionally been focused. Over the plan period there is an expectation that this trend will continue.
- 7.21 The ELR Update notes a potential undersupply of land for distribution development over the plan period relative to the requirement identified. This undersupply is recognised to be potentially in the region of 30ha.
- 7.22 However, the analysis recognises that there is significant availability of warehousing and distribution space within the key market areas which has previously been developed or is available and is being marketed at the time of writing. This includes:
- 213,240 sq ft of industrial/ distribution warehouse available at Centrum 100. The site also contains future development land which is currently being marketed including a site which benefits from planning permission to provide a 415,000 sq ft B8 industrial/ distribution facility; and
 - Centre 38 has one remaining plot which is currently being marketed by St Mowden for a Design and Build opportunity. The 6.33 acre site, which benefits from planning permission, will accommodate a new unit of up to 110,000 sq ft.
- 7.23 It should also be noted that two additional employment sites have been considered in the site supply analysis, Land West of Uttoxeter (PA1) and Lawns Farm (PA2), both Greenfield extension sites identified within the Preferred Option Local Plan. Both sites are recognised within the analysis to have the potential to contribute to the potential shortfall in B8 land over the plan period, subject to further work being undertaken around a suitable mix of uses. The allocation of these employment sites is supported by the ELR Update analysis as a result. These sites are not required for this use in their entirety, given the conclusions drawn previously around availability of distribution and warehousing floorspace in key locations including the A38 and A50 corridors.

Legacy Employment Sites

- 7.24 The ELR Update has identified a clear distinction within existing employment sites as to those which are poor quality sites but in good locations with potential longer term appeal, and those which are poor sites in poor locations with limited longer term appeal identified. Those sites that are recognised within the analysis to be 'legacy' sites, i.e. sites that have or had active employment uses on traditionally but have limited

market appeal in the future or in the event that the current occupier vacates the premises includes:

- 7a. Wetmore Lane, CEMEX Plant – active, but limited potential if existing occupier relocates due to site constraints;
- 93. Former Webb Ivory, Queen Street – limited commercial appeal given nature of building and surrounding environment, including site access;
- 94. Midland Timber - limited commercial appeal given nature of building and surrounding environment, including site access;
- 135. Greaves Lane – No wider commercial appeal and unlikely to be sufficient rural demand for conversion of buildings;
- 195. Mayfield Yarns - active, but limited potential if existing occupier relocates due to site constraints; and
- 132. Distribution Depot, Stubby Lane - active, but limited potential if existing occupier relocates due to site constraints and proximity to existing stronger employment location.

7.25 The ELR Update recommends that the above sites are not protected in the long term for employment development purposes.

Appendix 1
Example of site assessment proforma

Appendix 2 Removed sites

Appendix 3 Plan of sites

Appendix 4
Site assessment matrix

Appendix 5 Economic scenario data tables

Appendix 6 Land use categories

Appendix 7

Gross to net committed project job yield calculations

Appendix 8 Full site list

Reference Number: 102

Size:

Site is not in the draft ELR

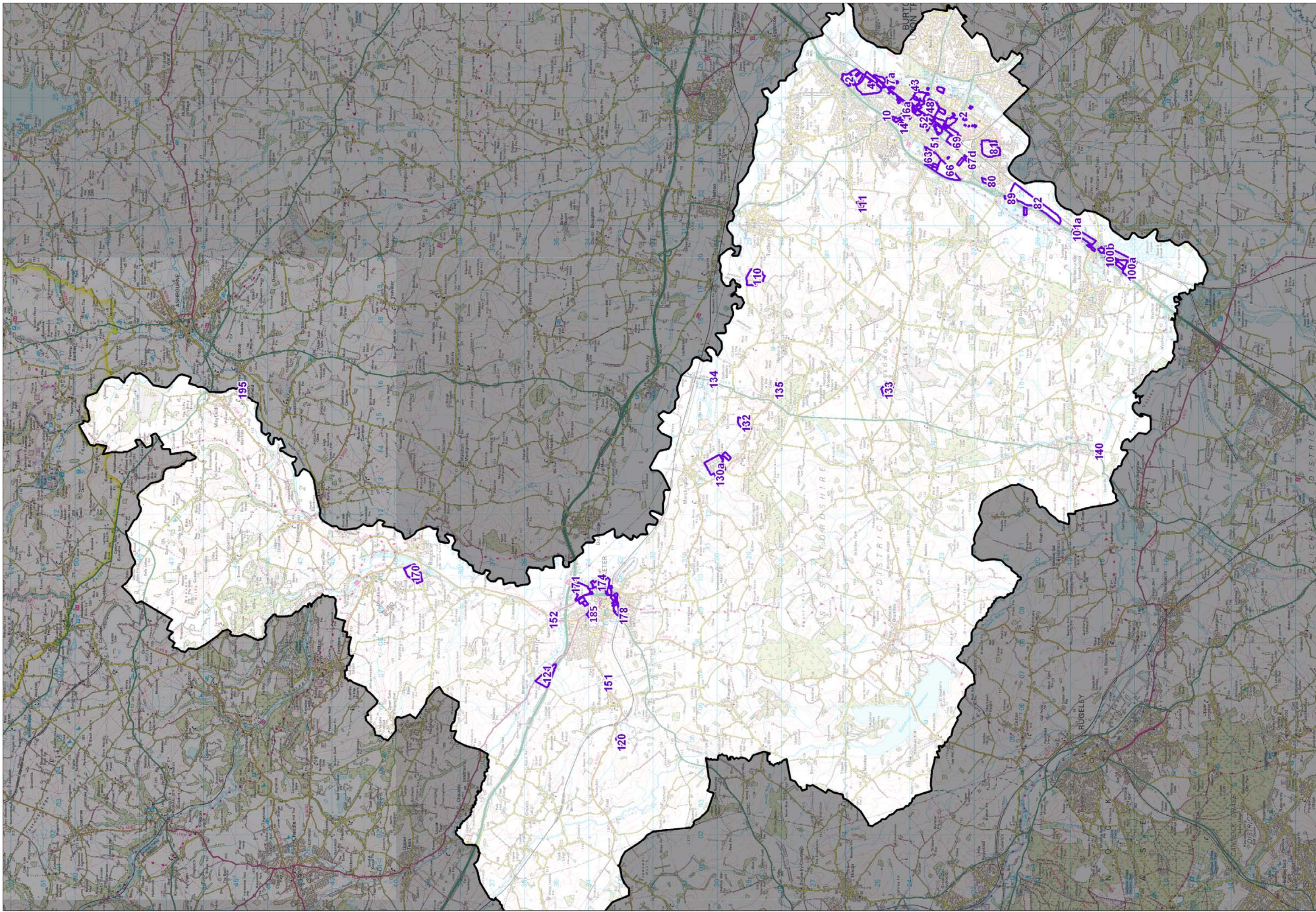
Release / Retain: ?



0. Base Information	This is a small industrial estate next to Barton Under Needwood, adjacent to the A38
1. Quality of Existing Portfolio and Internal Environment	Site consists of a number of industrial properties including a distribution / vehicle repair business called A S Taylor. Some dated buildings on site plus a large area of parking. There is also three fairly modern industrial units occupied by Durham and Barton Technical Services which are in good condition and secure.
2. Quality of the Wider Environment	Site borders the A38, is adjacent to Barton under Needwood village, fronts onto a canal and has agricultural land beyond
3. Strategic Access	Access is reasonable from the A38. Not an area that is well served by public transport.
4. Market Conditions / Perception and Demand	Site appears to be fully let and busy. There appears to be good demand for this location with its good access to A38

5. Ownership and User Constraints on Development / Redevelopment	Not applicable						
6. Site Development Constraints (undeveloped sited only)	Not applicable						
7. Accessibility	Reasonable, although canal bridge is slightly tight for HGV's						
8. Sequential Test and Brownfield / Greenfield	Site is within a small urban area in a larger rural location, it is a brownfield site.						
9. Social and Regeneration Policy	Not applicable.						
10. Comments	<p data-bbox="815 712 1444 784">We would support retaining this site for employment use as it appears to be fully active and provides useful rural employment.</p> <table border="1" data-bbox="815 817 1444 896"> <thead> <tr> <th data-bbox="815 817 1023 851">Release</th> <th data-bbox="1023 817 1230 851">Retain</th> <th data-bbox="1230 817 1444 851">Query</th> </tr> </thead> <tbody> <tr> <td data-bbox="815 851 1023 896"></td> <td data-bbox="1023 851 1230 896" style="text-align: center;">✓</td> <td data-bbox="1230 851 1444 896"></td> </tr> </tbody> </table>	Release	Retain	Query		✓	
Release	Retain	Query					
	✓						

Site Reference	Site Name
7	Plasplugs, Wetmore Lane
14	Dallow Street, adjacent to site 15.
16a	Reynolds Chains
18	Site between Derby Street and Victoria Street.
20	Little Burton West.
42	The Burton Business Park, Hawkins Lane.
46	Rear Anson Court.
61	Brabazon Court, Shobnal Road
81	Branston Depot.
96	Site is not in the draft ELR. Broadway Works.
97	Queen Street Units
131	Former Marchington Barracks
172	Dove Way
175	Adjacent Tesco.
177	Top Furniture Ltd
178	County Council Depot, Knotty Way.
179	JCB Heavy Products Ltd.
180	JCB Potter Street
181	Bridge Street Industrial Estate.
182	JCB Storage/Workshops/Lorry park between railway line and Trinity Street.
183	Land adjacent to Old Knotty Way.
63	Pectel Shobnal Road.
171	Land off Derby Road, A518, adjacent existing hotel.
SAI 205	Heath Road.
65	County Council recycling and coal depot, Shobnal Road Parkway.
SAI 202	No site name
SAI 204	Meadow Lane Farm.



1. Quality of Existing Portfolio	2. Quality of the Wider Environment	3. Strategic Access	4. Market Conditions / Perception of Demand	Quality and Market Demand - Assessment	Quality and Market Demand - Comment	5. Ownership and User Constraints on Development / Redevelopment	6. Site Development Constraints (Developable area only)	7. Accessibility	8. Sequential Test and Brownfield / Greenfield	9. Social and Regeneration Policy	Availability - Assessment	Availability - Comment	10. Comments	Comments review
Good quality industrial units of modern design and construction	Industrial/urban area with Beaches Park industrial/retail estate to one side and the A38 the other, small amount of brown residential to the front.	Reasonable access onto the Derby Road and then onto the A38. Poor access to public transport and rail network.	Brand new industrial estate, trading well. Being used for industrial and distribution uses.	Good	Quality employment site in accessible location with good occupancy	N/A	N/A	Good.	Site is within the urban area and is a Brownfield site.	N/A.		Site is built out	We note that part of the site has been identified in the SHLAA for residential use (Site 122).	Retain as employment land but release from supply.
Reasonable quality in well located industrial area. New office development on the site, not fully occupied but good quality.	Includes Pirelli factory to rear, Stretton Park Business Park to one side. McDonalds to the front of the site onto Derby Road.	Reasonable access onto the Derby Road and then onto the A38. Poor access to public transport and rail network.	New industrial estate, trading well, using industrial and distribution uses. New office development has taken place on the site. Not fully occupied but good quality, being marketed.	Good	Establish business location, noted activity on the site	N/A	N/A	Good.	Site is within the urban area and is a Brownfield site.	N/A.		Site is built out		Retain. Small plot available for employment.
Office units to the rear of the site have been constructed and are part occupied, active marketing of the site. Land to the main road remains undeveloped.	Residential to the Derby Road frontage, remaining three sides comprise Beaches Park industrial/retail park.	Reasonable via Derby Road onto the A38. On a bus route from the town centre. Poor access to public transport and rail network.	Some units already let. Others currently being actively marketed.	Good	Development opportunity remaining with road frontage adjacent to good quality office development with decent levels of occupancy / marketing activity	N/A	N/A	Good onto the Derby Road and the A38.	Site is within the urban area and is a Brownfield site.	N/A.	Good	Site available for regeneration, brownfield	We recommend retaining for employment use.	Retain. Small plot available for employment.
Buildings are of variable quality and ages ranging from 19th century to modern. Maintained for current use. Football ground on the roundabout frontage of the site.	Some residential to Beech Lane frontage, but industrial on other three sides.	Good access onto Derby Road, although narrow for HGVs. Public transport on Derby Road.	It is very unlikely that any other company could utilise this factory for a similar use if Pirelli vacated. It is of sufficient size to become a strategic development site if vacant.	Good	Established business location. Functions well for existing Pirelli use.	Constraints on development may be due to previous uses contamination, particularly for residential use.	N/A	Access onto Derby Road is reasonable.	Site is within the urban area and is a Brownfield site.	N/A.	Good	Brownfield site, development brief in place	We support retaining for employment use to support Pirelli. Burton Albion Football Club is also included in this site and we would suggest that it is sectioned off as an allocation so that if there is a change of use for the site, the football club can be safeguarded, or if the football club needs to relocate it can achieve a change of use on its current site more easily.	Agreed.
Vacant development land.	Site is surrounded on all sides by Industrial uses.	Good access via Derby Road A38. Public transport along Derby Road.	A good location for industrial or employment development.	Good	Established business location. Functions well for existing Pirelli use.	N/A	Site appears to be ready for development but there could be issues with contamination or access onto Derby Road.	Access would need to be improved onto Derby Road prior to development.	Site is within the urban area and is a Brownfield site.	N/A.	Good	Brownfield site, development brief in place		Agreed.
Car dealerships are in reasonable condition. Remenco buildings are a mix of fairly tired looking industrial/office properties of varying age and quality. Remenco still active on the site.	Site is essentially on an arterial road heading north out of Burton, it is a mix of uses directly opposite to the Pirelli factory.	Strategic access is good from Derby Road out to the A38, public transport along Derby Road.	Accessibility makes this a good location for industrial/distribution uses (small scale distribution) and we can see there as being good demand for sites in this location.	Good	Established business location. Good access within existing employment corridor.	Redevelopment subject to site assembly and ground conditions.	N/A	Good with numerous access points onto the Derby Road.	This is within the urban area (on the fringe, but certainly within) and is a Brownfield site.	N/A.		Site is built out	We would retain this for employment although would make comment that if there is demand for car dealership or some other uses such as trade counter then we would support possibly at least part being released for limited other uses.	Agreed.
Buildings are showing signs of age but site looks maintained. Site seems to be fairly active with a lot of occupation. No letting boards visible. Being used for industrial and cash 'n' carry/retail use (stationary).	Directly opposite the football stadium, backs onto the railway and has industrial estate to both sides.	Access onto Derby Road, good access to A38. Public transport on Derby Road.	Site is well occupied. There appears to be demand for this size of unit in this location. It could be suitable for redevelopment as new industrial units, but tenants may be price sensitive, hence occupation of older	Good	Established business location. Good access within existing employment corridor.	N/A	N/A	Excellent access onto Derby Road.	Within the urban area and is a Brownfield location.	N/A.		Site is built out	We recommend retaining this site for employment.	Agreed.
Mixed qualities, mostly poor quality including car park surface.	Site is surrounded on all sides by residential. Some residential on Wetmore Lane still under construction.	Access is reasonable out to the A5121, although via a hump back bridge.	Site is off-pitch for employment use and larger unit does not appear in good condition.	Poor	Access constraints to the site with access via a hump bridge, residential in proximity, not prominent / visible site	Site appears to be in partial use. No constraints to development visible apart from previous uses and proximity to flood plain.	N/A	Access is reasonable for residential, but very difficult for HGVs.	This is in the urban area and is a Brownfield site.	N/A.		Site is built out	We would, under the situation of access and poor location, support this site being released for residential use. We note that this site is allocated in the SHLAA for residential (site 10).	Retain
The property is in reasonable condition. Small high door industrial units, brick walls to lower half, steel profile and steel roofs. Busy with industrial activity.	Site is on an area of 'backland' bordering the flood plain and is next to a large national grid electricity sub station.	Access onto Wetmore Road and then the A511. Not close to public transport or railway station.	There appears to be good demand for these industrial units from occupiers who prefer value over location or appearance.	Average	Access issues but existing employment site and functions well	We have concerns as to the level of flood protections from River Trent. We would question residential redevelopment options next to such a large and imposing/noisy sub station	N/A	Accessibility is via a poor quality road which appeared to be unadopted and poorly maintained.	This is on the border of the urban area and is a brownfield site.	N/A.		Site is built out	We would support the retention of this site for employment uses due to difficulty for redevelopment, noise issues and flood risk.	Retain.
Unit is in good condition, well maintained and looked after. Currently occupied by DFL limited food and machinery and appears to be their showroom.	Site adjoins existing industrial estate and is opposite the football ground.	Strategic access is via Derby Road of the A38, which is good. Public transport along Derby Road.	The unit is well located. As a stand alone unit we would expect healthy demand for this unit if it became available for industrial/trade counter/retail uses.	Good	Good access within established employment corridor, prominent from roundabout	None evident.	N/A	Site has excellent accessibility with direct access onto a roundabout on the Derby Road.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	We agree that this site should be retained for employment use although it could be released for quasi retail/trade counter use.	Retain.
Fairly reasonable quality building sandwiched between the A38 elevated section and the Trent and Mersey Canal. Very narrow site.	Surrounding environment is an elevated dual carriageway and a canal with some residential to the far side.	Access onto the A511 is good.	We can see this unit being easy to let, decent storage areas, good access and in fairly good condition.	Average	Access issues but existing employment site and functions well	Very narrow site to develop - very long narrow site with a single exit. Current use appears to maximise the site.	N/A	Access directly out to the A511 which is reasonable.	Site is in the urban area and is a brownfield site.	N/A.		Site is built out	We would recommend retaining this for employment use. It is a reasonable industrial unit and unsuitable for other uses. It is too small, narrow and poorly located to be adequately used for residential.	Retain
Cleared site.	There is a boarded up pub to one side, poor quality residential to front and the Grief UK (site 12) industrial unit to the rear.	Access onto the A511, which has good public transport links.	Site has good road frontage, some employment uses adjacent but not high quality (eg lorry park).	Average	Road frontage site which is cleared and ready for development adjacent to other employment uses but not within prominent location / high demand area.	No issues subject to ground conditions (car showrooms/garages often suffer from oil leakage into the ground).	N/A	Good onto the A511.	In the urban area. Brownfield site.	N/A.	Good	Cleared site, brownfield	This site could be retained for employment, however we can see this site being suitable for other uses including residential, retail and uses that require visibility from roads such as a car wash. Its future uses could be dependent on the Grief unit, with a combined redevelopment or release increasing the viability of both sites.	Release
Premises appear to be in fairly reasonable condition, although could do with some maintenance work.	Directly opposite Stonell Direct (site 16). Victoria Crescent is a fairly narrow road for industrial uses and has a mix of residential and employment properties.	There is access onto the A511, then onto Derby Road and A38. Public transport serves Victoria Crescent and the A511.	This unit appears to be used for distribution at the moment. This is not a typical distribution location, however, there appears to be an active industrial area in the area so we can see there being a market for the	Average	Access issues but existing employment site and functions well	Adjacent residential properties may limit development for industrial uses.	N/A	Has access onto Victoria Crescent and then onto the A511. Victoria Crescent is too small for regular HGV use.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	We can understand why the unit is allocated to be released as there is a large amount of residential in the area. However we have concerns about valid industrial units with occupiers changing use to residential if that is unnecessary. We need to ensure there is sufficient quality industrial units available before sites like this are allocated for residential.	Retain.

1. Quality of Existing Portfolio	2. Quality of the Wider Environment	3. Strategic Access	4. Market Conditions / Perception of Demand	Quality and Market Demand - Assessment	Quality and Market Demand - Comment	5. Ownership and User Constraints on Development / Redevelopment	6. Site Development Constraints (Developable area only)	7. Accessibility	8. Sequential Test and Brownfield / Greenfield	9. Social and Regeneration Policy	Availability - Assessment	Availability - Comment	10. Comments	Comments review
The units are of varying quality and maintenance levels.	Mixture of residential, with an industrial estate to one side.	Access is out onto Victoria Crescent and then onto the A511. Victoria Crescent and the A511 are served by public transport.	There are a few vacant units but otherwise it appears to be a busy estate.	Average	Functioning employment location although limited wider appeal	N/A	N/A	Direct access out onto Victoria Crescent which provides reasonable access to the A511.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	We can see this site being used for residential infill as there area fairly new residential units to one side already. However we have concerns as to where the current occupiers uses will relocate to.	Retain.
Mixture - very reasonable office building on Dallow Street occupied by A P Vickers. The rest of the estate is a mix of period buildings being used for workshops - car repairs etc.	There is a canal to one side, industrial estates to the rear and residential along the two other sides.	Access to an 'A' road via residential streets and not ideal. The area is served by public transport.	The units are fairly well occupied. There will always be demand for small, cheap units of this kind.	Average	Functioning employment location although limited wider appeal	Ground contamination may be an issue due to previous and current uses. Access onto site is not ideal being close to the canal bridge with limited visibility.	N/A	Reasonable - direct access onto Dallow Street although there are issues with it being adjacent to a bridge, with limited visibility for such a busy road.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	The area has new residential development across Dallow Road. This site could be suitable for residential development assuming that site 13 (Steel Fabs) is included, otherwise it would make quite a disruptive neighbour. We are concerned as to where existing occupiers would relocate to.	Retain.
Buildings are of reasonable quality, fairly modern construction with brick walls to lower parts, steel profile to upper parts and roof. Site is secure.	Industrial units (site 12) opposite, mixture of industrial, offices and residential nearby. New residential being constructed to rear (site 16a).	Reasonable access out to the Derby Road, although not good for HGVs. Public transport on Victoria Crescent and A511.	This is quite a large unit for this location and with compromised access. Demand would come from uses that utilise cheap space e.g. storage. Part of the unit appears to already be in use for Richie's (Home Brew/Wine	Average	Functioning employment location although limited wider appeal	Issue of disturbance to adjacent residential and difficulty of commercial access on Victoria Crescent.	N/A	Access onto Victoria Crescent and then onwards to the A511.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	We agree that this site is suitable for release from employment use. We note that adjacent site (16a) has already been released for residential development.	Retain.
Property is in good condition, secure and well-maintained.	Appears that there is residential to all sides, including a school to one side.	There is reasonable access onto Derby Road. Area is served by public transport.	Fairly good location and spacious unit with large yard/parking. We would see this being easy to let if available.	Average	Functioning employment location although limited wider appeal	N/A	N/A	Adequate.	Site is in the urban area and is a brownfield location.	N/A.		Site is built out	We would support retaining site to support Blackmores. However this is a residential area and we note the adjacent school. We would support the site being released for residential in future if current tenant vacates.	Retain.
Building and yard are in good condition and well maintained.	Site is surrounded by a mix of residential with some commercial to front.	Access is good for the road network and also public transport along Derby Street.	We would not expect there to be large demand for a building supply yard in this location as it is constrained and causes disturbance to adjacent residential properties. There may be some requirement for	Average	Functioning employment location although limited wider appeal	Redevelopment may be constrained by access onto Derby Road for commercial vehicles if this has to go through the planning process.	N/A	Reasonable.	Site is within the urban area and is a Brownfield site.	N/A.		Site is built out	We would recommend this site be released to be used as an infill residential location which would better suit the immediate environment.	Retain.
Property is secure and well maintained. The industrial buildings appear to be in good location. Office building appears to have been refurbished to some extent at some point.	Industrial to one side, residential to two others. Fronts bust Derby Road.	Good access to Derby Road. Reasonable distance to the railway station and area served by bus services.	The site has vacant office space. This is secondary (or even tertiary) property. Industrial units could be used for industrial uses or vehicle servicing.	Good	Good access within existing employment corridor, considered to have wider appeal	N/A	N/A	Accessibility is reasonable onto Derby Road.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	We would question why this site is being retained for employment use when site 54 next door is suggested to be released. If 54 is to be released then 21 should be also.	Retain.
Property is open, vacant, overgrown land. It does not appear to be being maintained and is not secure.	Site is bordered by the A511, the railway line and industrial properties. Site is also bordered by one isolated house in poor repair.	Site is well located for access to road network and public transport but current access is narrow and unsuitable for commercial vehicles.	Site is reasonably located for demand, however, access may make employment uses impossible. Site is poorly located for any other use due to adjacent noise and pollution.	Good	Available development site within existing employment corridor with good access	N/A	Ownership may be an issue as the site is not obviously under management. Site has very narrow access which would prevent access from any large vehicles and preclude employment uses.	Site does not have its own access onto Derby Road, we would expect it to be difficult to secure access as there are a number of roads facing onto Derby Road immediately adjacent. Site may need to secure access through adjacent industrial estate which may hamper development.	Site is within the urban area and is a Brownfield site.	N/A.	Average	Potential ownership issues	We would support retention of this site for employment uses, although note that these should possibly be relaxed and include quasi employment uses such as trade counter and possibly retail as that appears to be the prevailing nature of the properties along this stretch of the Derby Road.	Retain.
Railway sidings.	Site is adjacent to existing railway with industrial on all sides.	Access would need to be created in some way. The site is close to Derby Road.	Site is narrow and difficult to develop. It could only come forward as part of a larger site.	Poor	Railway sidings site considered difficult to develop without inclusion of other sites. Poor access.	N/A	Issues of working so near to the railway line including any railway equipment underneath the site. It will be fairly expensive to clear the site and also difficult to secure access.	Poor due to very narrow/tight road.	Site is within the urban area and is a Brownfield site.	N/A.	Average	Development constraints likely to make delivery difficult / epxnsive	This is an unusual site in that the access is so poor that it could only be developed if access is secured through adjacent sites. If reasonable access can be secured we would recommend this site be retained for employment uses as is well located for such and would be a poor location for residential use due to noise from adjacent railway line, roads and industrial uses.	Retain.

1. Quality of Existing Portfolio	2. Quality of the Wider Environment	3. Strategic Access	4. Market Conditions / Perception of Demand	Quality and Market Demand - Assessment	Quality and Market Demand - Comment	5. Ownership and User Constraints on Development / Redevelopment	6. Site Development Constraints (Developable area only)	7. Accessibility	8. Sequential Test and Brownfield / Greenfield	9. Social and Regeneration Policy	Availability - Assessment	Availability - Comment	10. Comments	Comments review
Vacant land. Mature scrub land.	Surrounded on all sides by industrial properties, railway to the rear.	Direct access is onto the Derby Road, assuming the site has legal access over land fronting Derby Road. Close to public transport links.	Site is vacant so could presumably have been developed if in demand. It has no frontage to Derby Road, being 'back land'. This may affect desirability.	Average	Within existing employment corridor and good access to main road but behind existing use, not prominent, limited demand	N/A	Site appears to have been previously used as industrial. There may be ground condition issues. There may also be issue with securing legal access over land fronting Derby Road.	Access onto the Derby Road	The site is a brownfield site and is within the urban area.	N/A.	Average	Potential ground condition issues, potential direct access constraints	This site should be retained for employment uses. It may be best brought forward as part of a larger site including the Kwik-Fit to the front and the coach park to the rear to create a larger site that can be integrated as some kind of improvement to the bonded warehouse.	Retain.
Partially cleared site. Industrial unit appears reasonably maintained and secure although is vacant.	Railway to the rear, industrial properties to either side and 19th century residential to the front.	Access onto the Derby Road which gives access to the A38. Public transport available on Derby Road.	The industrial unit is in good condition and prominently located. We can see demand for this. The garage will make an excellent development site for a variety of uses.	Good	Road frontage site, partially cleared and ready for development, within existing employment corridor	N/A	Former petrol station so could be contamination issues, certainly tanks to be removed, ground remediation issues.	There is access for both properties onto the Derby Road.	The site is a brownfield site and is within the urban area.	N/A.	Average	Potential contamination issues	Query. The site should be trained for employment uses. However, the locations and nature of adjacent occupiers may favour the sites being released for quasi-retail use e.g. car dealerships, garages, trade counter. We note the industrial building has been a Pet supplier and is now a tyre warehouse and the development site was once a garage. We question if this is an employment location.	Retain.
The majority of the site is open derelict land which is unsecured and not maintained. To the rear of the site there are some industrial properties with a mix of ages, all in relatively poor condition although apparently secure.	Site has the railway line to the rear and is bordered on two sides by industrial land, one of which is a vacant petrol station. There are residential houses to the front.	Access is good onto Derby Road and is well served by public transport.	The site is well located for conversion to industrial/quasi retail functions.	Good	Road frontage site, partially cleared and ready for development, within existing employment corridor	N/A	Will be dependent upon previous uses and ground conditions.	Good, although would need to be improved if site were to go through the planning process.	Site is within the urban area and is a Brownfield site.	N/A.	Good	No issues noted	We would support the site being retained for employment uses, however we would also note the site should also possibly be considered for quasi retail or retail uses. This appears to be the changing nature of the industrial properties on this road.	Retain.
Site is an open cleared site and has been kept secure so appears to be under active management.	Site is bounded by industrial estate to three sides with residential on the other side of Derby Road.	Access is good onto Derby Road and well served by public transport.	The site is prominent to Derby Road and we would see demand for this for quasi industrial uses in particular e.g. trade counter.	Good	Road frontage site, partially cleared and ready for development, within existing employment corridor	Development is subject to previous uses and ground contamination. It is not clear that the site has direct access to Derby Road, but it appears that access can be achieved over adopted pathway.	N/A	It is unclear if the site has its own access that could be used for redevelopments or construction.	This site is a brownfield site and is within the urban area.	N/A.	Good	No issues noted	We agree this site should be retained for employment use as it is unsuitable for other uses.	Retain.
The existing Chinese restaurant looks of fairly new construction and reasonable quality. The industrial land is small and awkwardly shaped.	Residential to the front on the other side of a very busy road (B5018 Hawkins Lane). This site sits in an industrial estate which is of reasonable quality. Most of the buildings on the estate are of fairly recent construction, well maintained and quite busy.	Strategic access is reasonable via the B5018 Hawkins Lane. Site has public transport nearby but is beyond walking distance from the railway station.	The industrial estate seems to be fairly busy and well let.	Good	Road frontage site, partially cleared and ready for development, within existing employment corridor	N/A	The development site appears to be ready for redevelopment.	Good access on to the B5018.	This is in the urban area and is a Brownfield site.	N/A.	Good	No issues noted	Query. The site boundaries include a Chinese restaurant which is not an employment use. We support retaining the development site for employment use.	Retain for employment but release from available supply.

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The site has been levelled and appears to have been made ready for development.	This is an almost entirely industrial/offices with general employment area to all sides.	Site has good access to the A511. Served by public transport.	Site appears to be under initial stages of development.	Average	Cleared site and ready for development but limited demand	N/A	Site is currently being made ready for development.	Site appears to have direct access onto Wetmore Road. It is not ideal but we can't foresee issues with HGVs as the site is so small.	This is in the urban area and is a Brownfield site.	N/A.	Good	Appears ready for development	We would support retaining this site for employment uses.	Retain.
Appears to be largely open storage and areas of car parking. Some industrial properties for storage.	Site is largely surrounded by a mixture of industrial properties, with a small amount of infill residential.	Strategic access is reasonable on to the A511, there is a large amount of HGV traffic on and out of this site. Site is close to centre of town and is served by public transport.	This is unusual as it is a large distribution site which is located in the town centre. If Coors were to vacate we can foresee a lack of demand for a site of this size for distribution and storage purposes. There would be a great deal of demand for other employment uses or other uses.	Average	Functioning employment location although limited wider appeal	Site is large and one ownership, redevelopment will be subject to previous uses.	N/A	Accessibility is reasonable, but could be better bearing in mind the level of HGV traffic.	Site is in the urban area and is brownfield.	N/A.		Site is built out	We support retaining the site to secure Coors brewery jobs. However, we are unconvinced as to whether this is a good distribution facility beyond the use for Coors and whether it may be best to consider it for possible alternative use assuming the brewery is no longer in situ. Alternative uses are likely to be mixed use but it could be largely employment with some retail and residential. Uses would be dependent on the larger master plan for the area.	Retain.
Excellent, all recently completed.	Mixture of secondary industrial properties to all sides.	Access is on Wetmore Road which leads to the A511. Access to public transport.	Units are currently being marketed, with some tenants already in place.	Good	Road frontage site, being marketed, good quality development	N/A	N/A	Access is reasonable onto Wetmore Road.	This is in the urban area and is a Brownfield site.	N/A.		Site is built out	We agree that this site should be retained for employment use.	Retain.
Existing property is of reasonable quality, largely functional rather than attractive, open areas of parking and storage for building materials, site appears to be secure.	Site is largely surrounded by the Coors brewery with the railway line to one side.	Strategic access is reasonable. Access is good out on to the A511 and is well served by public transport.	These are secondary industrial premises and would only satisfy people who needed cheap accommodation, although it is very well located. More efficient use could be made of the site if redeveloped.	Good	Good access, with established employment location, secondary / indigenous demand	Redevelopment issues would be improvement to access and previous uses/contamination.	N/A	Accessibility is reasonable onto the A511 although improvement would be desirable.	This is in the urban area and is a Brownfield site.	N/A.		Site is built out	We agree this site should be retained for employment uses. However if the Coors brewery (site 48) adjacent came up for major redevelopment this site could be considered as part of that.	Retain.
Large site of mixed industrial and associated office uses.	Quality of the wider environment is variable from new retail, high quality listed buildings and some poor quality buildings.	Access is reasonable onto Horninglow Street A511. Site is central to Burton for public transport.		Good	Functioning employment site. Suits needs of existing occupier.	Constraints on development only due to previous uses and possible listing of parts of the brewery.	N/A	Accessibility is reasonable but the site could be opened up further if required.	Site is in the urban area and is brownfield.	N/A.		Site is built out	We agree site should be retained for employment use to secure existing use. Site could be considered for release for major regeneration development including employment, residential, retail, leisure etc. subject to master plan and support at regional level. This site could be pivotal in regeneration of Burton, but at the moment is in better use as employment.	Retain.

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Property is currently split into two separate units. Spirit car park is well maintained, other unit is roughly surfaced with more industrial property to rear and secure.	Site is adjacent to the railway line, close to the railway station and surrounded on all sides by roads. Site is immediately adjacent to Spirit Group Head Quarters.	Access is reasonable onto the road network, including the A5121. Site is immediately adjacent to the railway station and so has excellent public transport.	Part of the site is well used as a car park, the other part of the site is in some form of other employment use, we would expect there to be demand for a site in this location, bearing in mind how close to the railway station and town centre this is.	Average	Functioning employment location although limited wider appeal	Redevelopment may be dependent upon previous uses and also whether the site is actually one ownership as it appears to be split into at least two - potentially site assembly issue.	N/A	Access is good.	Site is within the urban area and is a Brownfield site.	N/A.		Site is built out	We would support retention of this site for employment uses, bearing in mind how close it is to the railway station but note that the Spirit Head Quarters appears to be allocated on the SHLAA as site 20 for residential development in which case this site may well be developed in conjunction with that.	Retain.
Portfolio is a variable quality, essentially an active industrial property.	Wider environment is a mix of some industrial, some residential, other brewing - very mixed use area.	Access to railway station is good, within 5 minutes walk. Access to main road network is reasonable rather than good.	There would be no demand for another brewery in this location. Nature of neighbourhood is changing and is now residential and leisure in nature.	Average	Meets needs of existing occupier. Limited wider appeal	Constraints of development would be largely to do with previous uses and also small congested road networks surrounding three sides of the site.	N/A	Accessibility is not good for current heavy industrial uses and would be difficult if redeveloped with increased residential use. All types of redevelopment will require improvements to access.	This is within the urban and area and is a brownfield site.	N/A.		Site is built out	We agree with the retention for employment use to preserve current employment. This appears to be a reasonable residential location and we would expect change of use in some part if Coors vacate.	Retain.
Property is in good condition, well maintained and secure. One office building of fairly modern appearance and some office buildings of possibly 19th century vintage.	The site is very close to the retail core of Burton, to one side is the library and to the rear is a sports centre - all fairly well maintained, to the other side is a bowling and leisure complex which appears to be semi-derelict and in poor condition.	There is access onto the A511 which is reasonable and the site well served by public transport.	There is no latent demand for this amount of offices in the centre of Burton particularly period offices which would not have modern facilities. We believe it would be difficult to find new tenants, and very unlikely to find a single tenant.	Average	Meets needs of existing occupier. Limited wider appeal	There may be issues with redevelopment of the period offices if listed or protected in some way.	N/A	Accessibility is reasonable for current uses but the adjacent streets are narrow tight and therefore would be difficult for any large scale employment use requiring HGVs. There may also be issues with high density residential/office use if it involves increased traffic movement.	Site is in the heart of the urban area and is a brownfield site.	N/A.		Site is built out	We agree this site should be retained for employment. However we question whether the period office buildings can be used successfully for employment uses if Coors vacate. If not is there a case for residential or something similar.	Retain.
Mix of industrial uses, in a range of premises. Estate is largely in use.	Small amount of residential opposite, including a church	Very close to the railway station. Road access via Moor Street.	This is a large area of industrial, including one large unit. There is a healthy market for units in this area with the adjacent Park Street estate (site 49d) being popular.	Good	Potential wider appeal, good occupancy rates, proximity to railway station	Constraints on development would be previous uses and increase in vehicular movements.	N/A	Access is not ideal for HGV movements as the main access road off Mosley Street is ingress only.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	We would agree that this site be retained for employment uses. However this would be excellent for large scale redevelopment to include employment uses alongside other uses due to proximity to train station.	Retain.
The quality of the portfolio is very varied, some are in excellent condition, and others are looking tired.	This is not an attractive estate, but does appear to be very busy and well let. There is one unit for let through Lambert Smith Hampton but apart from that no other boards are visible.	Access is fairly good out onto the A5189 and site is within 5 minutes walk to the railway station.	Mid size industrial units appear to be in demand here, there are a couple of vacancies but nothing significant.	Good	Potential wider appeal, good occupancy rates, proximity to railway station	Subject to previous uses no constraints for redevelopment for any other use are visible.	N/A	Access if fairly good. Park Street access is reasonable and ingress from Shobnal Road is good.	This is a brownfield site and is within the urban area.	N/A.		Site is built out	We agree to be retained for employment.	Retain.

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Buildings appear to be of modern construction with brick base and steel profile walls and roof, with shutter doors, concrete yard, ample parking, well-maintained public area, fairly modern construction.	Surrounding the property is a mix of residential, of varying ages from 19th century terraces to the late 20th century semis.	Access is reasonable onto the A5189. Site is approximately 5 minutes walk from the train station and served by public transport.	Site appears fully let. Small industrial units of this size are in demand.	Good	Potential wider appeal, good occupancy rates, proximity to railway station	Constraints on redevelopment seem to be largely based on access which is off a small residential street and concerns about adjacent residential uses.	N/A	Accessibility is not good, via small 19th century terraced residential streets.	This is in the urban area and is a Brownfield site.	N/A.		Site is built out	We would question whether this site should be released as it appears to be fully let and meeting a local employment need in an area which appears to show economic problems. Query - there are two sites labelled 49e on the map provided. The other one is a small site just off Park Street which has already changed use for residential.	Retain.
The quality of the existing buildings is good. Site is secure and well maintained.	19th century terraced residential to front and new flats to one side, railway to rear.	Fairly close to railway station and bus routes, reasonable access via Derby Road to the A38.	Unit might struggle to find new tenants due to its size. Other uses such as storage would be likely.	Good	Potential wider appeal, good occupancy rates, proximity to railway station	Constraints would be largely down to ground conditions.	N/A	Accessibility is reasonable via Wellington Road.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	We would agree this site is suitable for release for residential uses assuming that Biggs have a suitable site to relocate to.	Retain.
In very good condition, secure, branded as global brands distribution centre.	Industrial to one side and residential to two others, including new flats to the North. Railway line and road to the rear.	Access is good onto the A38 and site is very close to the railway station and bus routes.	This is a good sized industrial unit, but is located in urban area which is not ideal for distribution use. There may be an issue letting a unit of this size in this location.	Good	Current use may not be suitable but considered to have wider potential	N/A	N/A	Accessibility is good onto Wellington Road.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	We would agree this site is suitable for release for residential based on adjacent residential and closeness to the railway station.	Retain.
Well maintained properties.	Wider environment includes poor quality retail to two sides and railway lines to front.	Access is good to the Wellington Road and very close to the railway station and public transport.	Units appear to be well let and this is a good location for access.	Good	Good access to site, good occupancy levels	The grain warehouse is presumably listed in some form and would need to be maintained.	N/A	Reasonable.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	Query - Part of site has already been released for an Aldi supermarket. We would agree with the retaining for employment use of the small industrial units, but would suggest maybe the grain warehouse could be suitable for residential due to excellent location for railway station.	Agree to re-drawing of site boundary - arches are still available for employment whereas Grain Warehouse is not.
Portfolio consists of 19th and early to mid 20th century properties and a large open car park.	This is surrounded by a mix of residential and some limited retail to one side. Residential to rear is of good quality.	Access is good to the Wellington Road. Served by public transport interchange and close to railway station.	Ignoring the town hall this would appear to be a fairly reasonable location for employment uses on the car park.	Good	Central location, serves existing purpose	Town hall is listed and would not be suitable for development unless converted into residential which presumably is not likely.	N/A	Accessibility is good.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	Agree for retain as employment use.	Retain.

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Properties are a mixture of ages and uses, some 19th century and some later. Fairly well maintained and secure.	Industrial to two sides with residential to the front, a mixture of retail and residential to the remaining side.	Access is good to the Wellington Road, and within close proximity of the railway station and public transport.	Ruston Hickman are letting 1,556 sq ft, which is the only vacancy.	Good	Central location, serves existing purpose. Marketing activity noted	None apparent subject to none of the buildings being protected.	N/A	Accessibility is good out to Wellington Road.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	We would agree with retain for employment uses, although would note that in conjunction with site 60 this would make a very good residential location being so close to the train station. We note that this site is allocated under the SHLAA as site 24.	Retain.
Properties and common areas are in reasonable condition.	Site is surrounded on three sides by residential with 19th century industrial units to the other side. Fronts onto the main road into Burton (Wellington Road).	Strategic access is good out to the A38.	These units appear to be well let and are in a good location for access. There appears to be only one vacancy (3,225 sq ft unit, being marketed by Sallaway - www.sallaway.com	Good	Good access to main road. Good occupancy levels	N/A	N/A	Very good.	Sites are within the urban area and are brownfield sites.	N/A.		Site is built out	We would support retaining for employment use. We would note that this is a key gateway location into Burton from the south and could possibly support a landmark building of some sort.	Retain.
Former factory complex involving buildings of possibly 19th century, early 20th century and later 20th century vintage. Sub divided into small industrial units, it appears fairly well maintained but is not an efficient use of space.	Site has industrial uses to two sides with brand new residential to the front.	Access is reasonable out to the A38.	There are a number of vacancies on the site. This provides premises for a number of small companies who are price sensitive.	Average	Good access but noted market issues for premises of this size in this location	N/A	N/A	Accessibility is reasonable out onto Wellington Street.	This is within the urban area and is a brownfield location.	N/A.		Site is built out	Query. We would question the retaining of this site for employment use as it appears to be a large strategic site and is well located for the railway station. We would favour retention if there were proposals to make use of the location to produce a mixed use office/residential site. It would make a good residential site which would fit in with the character of the residential to this side of the railway line. We note that part of this site may be in the SHLAA site 24.	Retain.
Site is in reasonable condition and secure. Consists of industrial buildings and open parking space.	Marstons brewery to front, brand new residential to one side and open amenity space and leisure centre to rear.	Site has access via A roads to the A38. Limited public transport on Shobnall Road.	Site appears to be fully let and used.	Average	Reasonable road access and public transport provision, existing employment location but also residential uses in proximity	N/A	N/A	Accessibility is reasonable.	Site is on the fringe of the urban area and is a brownfield location.	N/A.		Site is built out	We support this site to be released for residential development due to proximity of park and adjacent residential, although note it is not well located for train station and is directly opposite Marstons brewery which has a large number of vehicle movements a day, concerns regarding complaints.	Retain.
Portfolio is a range of industrial and office buildings from 19th and 20th centuries. Well maintained and secure.	Industrial to all sides, though with residential under development to front (site 63).	Site has access via A roads to the A38. Limited public transport on Shobnall Road.	There would be no demand for a property of this size as a whole; there may be demand however for sub divided industrial units.	Average	Reasonable road access and public transport provision, existing employment location but also residential uses in proximity	Constraints on development would be based on listing of buildings and any ground conditions due to current and previous uses.	N/A	Accessibility is reasonable. Large numbers of HGV movements.	This is on the fringe of the urban area and is brownfield.	N/A		Site is built out	We support retention of site for employment uses to support Marstons.	Retain.

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Palletforce warehouse is brand new and in excellent condition. Remainder of the site is largely level and available for development.	A38 to one side and industrial units to the rest.	Access is reasonable via Centrum Business Park to the A38. Site is a long distance from the train station and bus routes.	We would see this as a good industrial location.	Average	Reasonable road access but not very good public transport. Proximity to A38 but access through Centrum Business Park	Development constraints based only on site issues which presumably the developer has taken account of upon purchasing the site.	N/A	Access is good via a new purpose built road.	Site is on the very fringe of the urban area (assuming the A38 is the boundary). It is effectively now a brownfield site.	N/A	Good	No major constraints, brownfield, within urban area (on fringe)	We would agree this site should be retained for employment uses as a major strategic site.	Retain as employment land but release from supply.
Development site.	Adjacent to Kongsberg Auto unit and Marstons Brewery, some residential to one side, A38 elevated section to rear.	Access is reasonable via Centrum Business Park to the A38. Site is a good distance from the train station and public transport (unless access is possible onto Shobnal Road).	Site appears to be well located for industrial development.	Average	Reasonable road access but not very good public transport. Proximity to A38 but access through Centrum Business Park	N/A	Constraints are subject only to ground conditions, access is already supplied. Note any environmental issues also need to be taken into account such as Water Courses.	Accessibility is good, access road already in place.	Site is on the very fringe of the urban area (assuming the A38 is the boundary). It is effectively now a brownfield site.	N/A	Average	Potential constraints including water courses and contamination	We would agree the site should be retained for employment use.	Retain.
Well maintained modern industrial unit.	Site is located to the rear of an industrial estate with the A38 elevated section to the rear.	Access is reasonable via Centrum Business Park to the A38. Not close to the train station or bus routes.	This is a good re-lettable unit.	Average	Reasonable road access but not very good public transport. Proximity to A38 but access through Centrum Business Park	N/A	N/A	Access is good.	Site is on the very fringe of the urban area (assuming the A38 is the boundary). It is effectively now a brownfield site.	N/A		Site is built out	We agree this site should be retained for employment use.	Retain.
Development plot in the middle of an industrial estate.	Entirely industrial location.	Good road access to the A38, bus stop adjacent but not close to train station.	Well located spot on popular industrial estate.	Good	Good access to A38 within high quality employment area	N/A	Constraints only subject to access and site conditions.	If the site is accessed through existing unit it will be ok as it does not appear to have direct access to road itself.	Site is within the urban area and is a brownfield location.	N/A	Good	No major constraints, brownfield, within urban area	We support this site being retained for employment use.	Retain.
Site is part of large new build industrial warehouse - this is Opus Axis and being marketed by Jones Lang LaSalle.	Entirely industrial location.	Good for distribution to the A38.	Site is currently on the market.	Good	Good access to A38 within high quality employment area	N/A	N/A	Good.	Site is within the urban area and is a brownfield location.	N/A		Site is built out	We support retaining for employment uses.	Retain.

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Open level development site.	Entirely surrounded by industrial uses.	Good to the A38, however it is a distance from the train station.	This is a site for industrial development or employment development. We are informed that part of the site may have been sold to a hotel operator, but construction has not started yet.	Good	Good access to A38 within high quality employment area	N/A	No obvious constraints to the development subject to access and site conditions.	Good subject to securing access.	Site is within the urban area and is a brownfield location.	N/A	Good	No major constraints, brownfield, within urban area	We agree this site should be retained for employment use.	Agree with comment.
Brand new, un-let warehouse on site called The Duke (302,693 sq ft warehouse/distribution unit, currently being marketed by Knight Frank and M3, built by Standard Life Investments). New operational DHL warehouse on part of the site. Northern part of the site is still for sale as development land, advertising two plots (1 acres and 2.3 acres) Its called the Avery Business Park and is for sale through Ruston Hickman.	Entirely industrial location.	Strategic access is good to the A38. Not close to the train station.	The warehouse is a suitable building for the location and we would expect strong demand for this and the development plots.	Good	Good access to A38 within high quality employment area	N/A	N/A	Excellent.	Site is within the urban area and is a brownfield location.	N/A		Site is built out	We agree this site should be retained for employment use.	Retain.
Development site is partially serviced with good access. Land is owned by Askew Properties Limited and is called Gateway 38. It is currently being marketed by Ruston Hickman, they are advertising it as a mixed use development with office buildings from 10-50,000 sq ft and car show rooms up to 1.75 acres.	Adjacent land uses on two sides are employment office buildings with residential and school to other sides.	Access to main road network is excellent. Poor access to railway and bus network.	This is a high profile location and we would expect good demand for employment uses. It is a good car showroom location.	Good	Good access to A38 within high quality employment area	N/A	Site appears to be ready for development, subject to ground conditions.	Excellent.	Site is within the urban area and is a brownfield location.	N/A	Good	No major constraints, brownfield, within urban area	We agree this site should be retained for employment use.	part of site is not developed out - field with road frontage. The rest of the site is built out
Site is open agricultural land bordered by the A38 to one side and the railway to the rear.	Site is on the edge of the urban area of Burton/Branston, fronts onto the A38 and with the railway to the rear but is still currently open agricultural land.	We assume access can be achieved from the A38 in which case access would be good but would note that this is not an area served by public transport. We are informed that this site is proposed as the access onto the A38 of a new River crossing and a new trunk road east. That would make this a prime strategic access site, but we are not aware of firm commitments to the new road.	We would expect demand to be high for employment or industrial uses for an area of this size adjacent to the A38 and benefiting from the A38s industrial/distribution corridor.	Average	Proximity to A38 but access needed	N/A	We are informed that this site has considerable ground condition problems due to previous mineral extraction. Developable land may be restricted to less than 8.5ha. We have seen no evidence to support this, but understand the Council may have been made aware previously of the site issues.	Access would need to be created onto the A38.	Site is outside of the urban area but is a brownfield site.	N/A	Average	Potential ground condition issues, outside of urban area	We agree that this site should be retained for employment uses as it is a natural extension of the South Burton/Branston industrial/distribution area, however we are concerned as to the actual size of the commercially developable area.	
Property appears to be secure and well maintained. It is a large area of open surfaced area used for the storage of shipping containers.	Site fronts onto the A38 with the Branston Water Park (nature reserve) to the rear.	Access is direct from the A38. There is no evidence of public transport.	Site is well located to take advantage of A38/industrial distribution corridor. We would expect there to be demand for employment uses in this location.	Good	Prominent site, nearby established quality employment location, access to A38	We note adjacent Branston Water Park (nature reserve) and would query whether this would place any restrictions on development.	N/A	Excellent.	Site is a brownfield location but is outside of the urban area.	N/A		Site is built out	We note this site is allocated for release from employment uses, we would question suitability for alternative uses. Site is very noisy and subject to high levels of road pollution for residential uses. We would recommend retaining the site for employment use.	

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Units are a mix of ages, sizes and condition. Includes industrial, office retail properties. Much of the common areas around the industrial properties are poorly maintained.	Sites back onto the railway line. Mix of residential and employment uses in surrounding areas.	Good access to the road network. Close to railway station and served by public transport.	Properties are well let for secondary uses. There is a demand for this type of property.	Good	Good road and public transport access, good secondary demand location	Redevelopment may be subject to ground conditions and listing of the older warehouse buildings.	N/A	Good.	The site is in the urban area and is brownfield.	N/A		Site is built out	We query why this site is allocated to be released for other uses when it appears to be successful and well let. In particular it is adjacent to site 92 which is being retained and is not as well located. Query whether we believe this site should be released. We would recommend this site be retained for employment uses.	
Fairly well maintained unit on secure site.	This factory is surrounded entirely by 19th century terraced residential streets which back directly onto the factory walls.	Road access is via a narrow street. Reasonably served by public transport.	It would be very difficult to re-let this property in its current use due to the location and type of building.	Poor	Limited demand and poor quality site access	No obvious issues.	N/A	Access is poor, via small congested streets.	The site is in the urban area and is brownfield.	N/A		Site is built out	We agree that this site should be released for other uses, providing that there are suitable premises for the current occupier to relocate to. We note this site is identified as site 32 in the SHLAA.	
The property appears to be in good condition and well secured, with fairly new buildings.	Surrounded by terraced 19th century residential streets. There are parking issues with the street being crowded with cars.	Road access is not good. Site is not close to railway station but is reasonable distance from bus routes.	This is not an ideal location for this use, I would expect it would be difficult to sell/let for similar use.	Poor	Within residential area, access issues, limited wider demand	Disruption to adjacent residential would be detrimental for development for employment uses.	N/A	Accessibility is poor for commercial uses.	This is within the urban area and is a brownfield site.	N/A		Site is built out	We would support the site being released for residential infill development.	
Building is of reasonable quality, site is secure.	Building fronts onto a Tesco car park and is surrounded on two sides by residential and the river on the fourth side.	Access is reasonable out on to the A5189 and the Branston Road. Access to bus services is reasonable.	The unit is not in an ideal location. We would expect limited demand for this unit for current uses.	Average	Within residential area, limited wider appeal	Issues are noise issues on adjacent residential and ensuring development is not at risk of flooding from the river.	N/A	Accessibility is not good with access being along a residential street of mostly 19th century terraces. Access in particular out to the Branston Road is tight for HGVs.	This is within the urban area and is a brownfield site.	N/A		Site is built out	We agree this site should be released for alternative uses, subject to suitable flood protection for residential.	
				Good	High quality location, proximity to A38 and good access in place							Site is built out	Sites are currently being developed as Barton Business Park. Site should be retained for employment use.	

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				Good	High quality location, proximity to A38 and good access in place							Site is built out	Sites are currently being developed as Barton Business Park. Site should be retained for employment use.	
				Good	High quality location, proximity to A38 and good access in place							Site is built out	Sites are currently being developed as Barton Business Park. Site should be retained for employment use.	
				Good	High quality location, proximity to A38 and good access in place						Good	No constraints noted	Sites are currently being developed as Barton Business Park. Site should be retained for employment use.	
				Good	High quality location, proximity to A38 and good access in place							Site is built out	Active industrial estates, we would support retaining for employment use.	
New good quality industrial units as part of the larger Gray Car industrial estate.	Site is adjacent to the A38, forms an extension of the Gray Car Industrial Estate. Is surrounded on other sides by open agricultural land.	Access is good to the A38. No immediately adjacent public transport.	Site appears to have been developed and is occupied. Site is well located, taking advantage of the A38 industrial/distribution corridor.	Good	High quality location, proximity to A38 and good access in place	N/A	N/A	Good for employment uses.	Site is now a brownfield location after development, although the industrial estate is located in a rural location.	N/A		Site is built out	We would recommend site is retained for employment uses.	

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Site consists of a number of industrial properties including a distribution/vehicle repair business called A S Taylor. Some dated buildings on site plus a large area of parking. There are also three fairly modern industrial units occupied by Durham and Barton Technical Services which are in good condition and secure.	Site borders the A38, is adjacent to Barton under Needwood village, fronts onto a canal and has agricultural land beyond.	Access is reasonable from the A38. Not an area that is well served by public transport.	Site appears to be fully let and busy. There appears to be good demand for this location with its good access to the A38.	Good	Established, proximity to A38 and good access in place	N/A	N/A	Reasonable, although canal bridge is slightly tight for HGVs.	Site is within a small urban area in a larger rural location, it is a brownfield site.	N/A		Site is built out	We would support retaining this site for employment use as it appears to be fully active and provides useful rural employment.	
Property appears to be in a reasonable location and the grounds are well maintained and secure, site has individual access from the B5016.	Site is located on the junction of the A38 and is surrounded on all sides by the A38 and associated slip roads. Beyond that is predominantly rural.	Access is excellent to the A38. No evidence of an extensive public transport network.	Site is currently being let by Rushton Hickman. The building is still in use for offices.	Good	Established, proximity to A38 and good access in place	Only query is listing of the building.	N/A	Good from the B1056 and excellent onwards onto the A38.	Site is outside of the urban area and is a brownfield location.	N/A		Site is built out	This is an unusual site in that it is well located for office use but the building itself may not be suitable for modern requirements. The building itself may be suitable for residential conversion but adjacent A38 would make this a very noisy residential location and we would not recommend for such uses. We would recommend retaining site for employment uses but also consideration given to any form of redevelopment of the site for more modern properties, subject to listing/preservation of existing property.	
Properties appear to be of modern construction, in good condition, well maintained and secure.	Site fronts the A38 with direct access to it, it is surrounded on two sides by industrial buildings and yard space and on the remaining side by an area of open recreation land and lakes.	Access is excellent to the A38. No evidence of public transport.	Site is well located to take advantage of A38 industrial/distribution corridor. Buildings appear to be in reasonable condition. We would expect there to be demand for this unit in all or part.	Good	Established, proximity to A38 and good access in place	N/A	N/A	Excellent.	Site is a brownfield location but is not within the urban area.	N/A		Site is built out	We would recommend site is retained for employment uses.	
Site appears to be a former industrial site that has been converted into an industrial estate. There are a large number of units located almost haphazardly across the site, there are also large amounts of vacant/derelict land. There are also occupiers (e.g. SOS) who have well maintained and secure units as part of the estate. There is an extension to the site which appears to be serviced with a new road and is classed as Rhino Industrial estate which should be coming available soon being let by Rushton Hickman. The site appears to	Site is entirely surrounded by agricultural land apart from along the road frontage where there is an area of residential properties, which appear to be located also on part of the former industrial site.	Site is located off a minor road and access onto the main road network, the A511 is through the village of Tutsbury with small congested streets. There is no regular public transport to this location.	There is at least one unit available to let at the moment but the site does appear to be vibrant and well used. The SOS building appears to be of very recent construction. There is demand in this location for industrial/storage units. Lettings board identifies that space is available from £2.50psf through Kingston 01543414300	Average	Minor road access, poor public transport provision, but appears to be strong local demand	Constraints may be due to previous uses and access.	N/A	Accessibility is reasonable but not ideal for large vehicles onto a minor road.	Site is a brownfield location but is not within the urban area.	N/A		Site is built out	We support the allocation of this site for employment uses as it appears to be serving a need in this part of the country.	
Property encompasses fairly recently built industrial properties which may be purpose built or previously agricultural buildings. The estate ground form part of the farm yard. Properties are in reasonable condition and appear secure. There is only one company in occupation - GRIEF.	Estate forms part of a former farm yard which appears to still be in partially working order. The former farm house and stables have been converted into residential accommodation which forms a small residential estate adjacent to the industrial estate. Site is entirely surrounded by rural agricultural land.	Access is via Main Street and does not have direct access onto the A38. Site is served by a rural bus service.	We would not expect there to be a great deal of demand for employment use in this location as it is so far from the strategic road network. Industrial estate does not appear to be particularly busy or well developed.	Poor	Not proximate to SRN, rural bus service provision but limited demand	Restrictions placed by planning authority on further developments of agricultural land?	N/A	Accessibility is reasonable.	Site is now a brownfield site but is in a rural location.	N/A		Site is built out	We would support the retention of this site for employment uses to support rural employment.	

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This is an industrial estate combining a number of buildings most of which appear to be of modern construction. The estate is of untidy appearance with improvised speed bumps and it is unclear where the boundaries are on a number of the properties. However the estate appears to be bustling and well used and its condition possibly reflects its uses.	The estate is entirely surrounded by rural land.	Access is onto the B502, access onto the strategic road network is not immediate and can be achieved via either the A50 or the A51 along B roads.	The estate appears to be well let although and a low grade unit was bring advertised by Chivers Commercial 01785 223 913. There appears to be a demand in this location for these properties, some of which also appeal direct to the public i.e. car repairs.	Poor	B road access to the site, very limited local appeal	N/A	N/A	Reasonable onto the B5027	Site is a brownfield location and is located in a rural area.	N/A		Site is built out	We would support this estate being retained for employment use as it appears to be well used and provides jobs in a rural location.	
Good quality industrial unit in a rural location with associated parking.	Rural location adjacent to the A50.	Excellent to the A50, poor public transport access.	Site is specific to JCB although would be suitable for distribution if converted - certainly location is excellent for distribution.	Good	Excellent access to A50, good distribution location	N/A	N/A	Excellent.	Site is in a rural location but is now a brownfield location.	N/A		Site is built out	We would support retaining site for employment use.	
Buildings are a range of sizes, ages and uses, site is well maintained and under on ownership, site is secure.	Site is entirely surrounded by agricultural land.	Access is by the B5017 and then via the A515 up to the A50 - therefore strategic access is not ideal. There is no public transport to the site.	Site appears to be fairly bustling and well let although there are vacancies on the site which are currently being marketed by GVA and M3. A large number of the units were previously used by the Government for vehicle storage, which we believe has ceased recently causing large vacancies in the last couple of years. The size of the industrial units is unusual, they are very large for a site without direct access onto the A Road or major trunk road. This may be hampering the success of the site.	Poor	Difficult road access, poor public transport provision, big units potentially difficult to let	Further development may be affected by the issues raised previously of poor access to major trunk routes.	N/A	Site has reasonable access onto the B5017.	Site is in a brownfield site in a rural location.	N/A		Site is built out	We agree this site should be retained for employment uses.	
Site comprises a number of industrial units which are not in a fit state for occupation or refurbishment. Also comprises an area of open ground, some surfaced and some vacant un-surfaced. This is part of the industrial estate which is currently un-lettable and so has been allocated for development as new units.	Site is part of the Marchington Industrial Estate.	Access is by the B5017 and then via the A515 up to the A50 - therefore strategic access is not ideal. There is no public transport to the site.	We are aware there are vacancies on the industrial estate and are unsure as to what the demand would be for properties here. However we can see not other use for the site than as employment uses.	Poor	Difficult road access, poor public transport provision, limited wider market appeal	Redevelopment would be subject to ground conditions but we can not foresee any issues as the site will be redeveloped for its current use.	N/A	Access is via Marchington Estate, see reference site 130.	Site is in a brownfield site in a rural location.	N/A	Average	Clearance required, site in a rural location	We support the retention of this site for employment uses.	
Buildings appear to be in good quality, well maintained and secure.	Site is entirely surrounded by agricultural land.	Access is via the B5017 which leads onto the A515.	This is an unusual location for such a large distribution unit and a mainstream distribution company. We think it would be difficult to find another occupier for this unit as it is so far from the normal A road and trunk roads that such occupiers prefer. It would be possible to let in part to smaller occupiers. However, there is a large amount of competition here from the nearby Marchington Industrial Estate.	Poor	Difficult road access, poor public transport provision, big units potentially difficult to let	N/A	N/A	Good onto the B5017.	Site is in a brownfield site in a rural location.	N/A		Site is built out	We would support retention of this site for employment uses.	

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All buildings are of new construction, the estate is well maintained and is still under construction in parts.	Site is entirely surrounded by agricultural land.	Access is by the B5234 leading onto the A515. There is no obvious public transport for this site.	Site appears to be letting well, Rushton Hickman are letting one of the offices, other occupiers include Activa; Leslie Keats; Whitebox construction; Longvale. Sale or Lease Design and Construction for B1, B2 and B8. Tel: 01283 543 053	Average	Proximate to A-Road, no obvious public transport but good occupancy levels	N/A	N/A	Good presuming as per original planning conditions.	Site is brownfield (appears to be formerly part of the adjacent airfield) and is in a rural area.	N/A		Site is built out	We recommend this site should be retained for employment uses.	
Industrial estate is in very good condition, well maintained and secure, appears to be fully let with quality tenants such as John Deere.	Site is in a rural location although there is a petrol station to one side and appears to be a quarry or former quarrying premises on the other side of the A515.	Access is direct onto the A515 leading to the A50 and is good although site is poorly serviced by public transport.	The entire estate appears to be fully let and serving a local need.	Good	A road access, poor public transport, appears well let suggesting demand	N/A	N/A	Good onto the A515.	Site is in a brownfield site in a rural location.	N/A		Site is built out	We would support retention of this site for employment uses.	
Properties are entirely derelict, poorly maintained and appear to be on the verge of collapse. Site appears to have been used previously for housing animals.	Site is in an entirely rural location on the edge of the village of Draycott in the Clay.	Access is onto the A515 however this is via a narrow, rutted country lane.	There would be no demand for these properties or this location for employment use.	Poor	Poor quality access, no public transport, limited wider appeal / demand	Possibly subject to rural/agricultural limitation on the use for this site.	N/A	Very bad along Greaves Lane, which is a narrow rural track.	Site is in a brownfield site in a rural location.	N/A		Site is built out	We do not understand why this is an allocated site for employment uses as it appears to have been used as a farm yard or for animal husbandry purposes. We recommend this site should not be used for employment uses.	
Building is in reasonable condition although is dated and has reasonable area of surfaced car parking/yard.	Site is entirely surrounded by agricultural land on the south side of Yoxall village.	Access is direct onto the A515.	There is a lack of industrial/storage properties in this location and we can see there being some demand for this property in some form.	Good	A road access, suggestions of reasonable market demand	N/A	N/A	Good onto the A515.	Site is in a brownfield site in a rural location.	N/A		Site is built out	We recommend this site should be retained for employment uses to ensure employment in a rural location.	
Industrial unit in unsurfaced farm yard which appears to be still active as a farm. Units are being used for car servicing/vehicle servicing. There are vacant units.	Site is surrounded on three sides by open agricultural land with small garden centre and residential across the Bramshall Road.	Site is a good distance from Uttoxeter and has poor access to public transport. It is also not ideally located for the strategic road network with no immediate direct access to the A50.	Site does appear to have a vacancy and this is possibly an unusual location for an industrial unit. Site is in competition with the Bramshall industrial estate which has greater critical mass.	Poor	Poor quality access and limited wider appeal	This is an agricultural area so there may be issues with further redevelopment or change of use.	N/A	Good onto the Bramshall Road.	Site is a brownfield location but is surrounded entirely by Greenfield and is outside the urban area.	N/A		Site is built out	We are unsure if this site should be retained for employment uses unless there is a specific rural employment policy. It currently seems to be under utilised and poorly located for public transport and may be better used as residential.	

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Properties are a mixture of ages and uses, all fairly well maintained.	There is agricultural land to three sides with a small amount of updated residential and open storage.	Access is excellent onto the A50. Site is rural and poorly served by public transport.	Quite an unusual location, we think it could be difficult to find another occupier for the units.	Average	Good access but potential limited wider appeal	N/A	N/A	Good.	Site is a brownfield site and is within a rural location, rather than urban.	N/A		Site is built out	We would agree the site be retained to secure the employment at K H Motors and Key Stone Computer Group and Paragon Travel plus others in this location particularly if that is a part of a rural employment policy, otherwise the site would make a good residential location.	
Open agricultural land between Uttoxeter and developed area (Hotel and sewage farm) alongside the A50.	Site is largely bounded by agricultural land with a small amount of retail and residential and a sewage farm.	Excellent via the A50. Public transport will be limited here but site is reasonably close to the train station and public transport routes.	Site is well located to take advantage of A50 corridor, however we are unaware of any large employment requirements in this area. We understand the site may have been identified for JCB who located to site 121 instead.	Good	Good A road access, near to station	N/A	Constraints would be only subject to usual environmental concerns and improved access.	Accessibility is subject to improvement which will come with development.	Site is not a brownfield location, it is a Greenfield site and is on the very edge of the urban area.	N/A	Poor	Potential environmental constraints, greenfield site	We would agree this site should be retained for employment uses. This could fulfil all of Uttoxeter's employment land needs for the plan period.	
Quality is fairly reasonable for a location such as this. Site appears to be fairly active. Council depot is well maintained and secure.	Site backs onto small amount of residential, surrounded on most sides by playing field and open agricultural land. A new residential development comprises approx 50 units has recently been completed on the east edge.	Site is not very close to the train station and vehicle access via Pennycroft Road is tight onto the main road network.	The site is used as a Council recycling centre, small industrial units appear to be well let and in demand. Hawksworth graphics, Dovebank motors current occupiers.	Average	Reasonable road access, good lettings noted within small units	Vehicle access is not good via Pennycroft Lane.	N/A	Not good via Pennycroft Lane and Park Lane beyond that.	Site is a brownfield location and is on the fringe of the urban area.	N/A		Site is built out	We would support the retention of this site as an employment use although we do not think that it is an important employment location and could be released if the demand for the industrial units falls or the re-cycling centre is re-located.	
Good quality industrial estate, buildings of recent or modern construction. Well maintained and secure.	Site is bordered on two sides by open agricultural land, industrial/retail estate to another side and a limited amount of new residential to the Derby Road side.	Good via Derby Road to the A50 and reasonably close to the railway station.	This is the largest and most important employment area in Uttoxeter. Estate appears to be well let with no obvious letting boards and is quite thriving.	Good	Good road and rail access, good lettings / occupancy, wider appeal noted	N/A	N/A	Accessibility is good.	Site is brownfield and forms the edge of the urban area.	N/A		Site is built out	We would agree this site should be retained for employment use.	
Warehouse/office building in construction with aggregates being stored on surrounding land.	Bordered by agricultural land and remaining sides by the Dovefields industrial estate.	Good via Dovefields estate to Derby Road and reasonable distance to railway station.	Assuming this is an extension of Dovefields estate which is very vibrant we believe there is demand for this site.	Good	Good road and rail access, good lettings / occupancy, wider appeal noted	N/A	Development would be subject to normal environmental issues such as flood risk and site conditions.	Site already has access road to front off the Dovefields industrial estate service road.	Site is not within the urban area and would form a new boundary to the urban area. It does not appear to be a brownfield site but is used for some form of open storage, possibly in association with the race track which is next door.	N/A		Site is built out	We would agree this site should be retained for employment uses as an extension to the Dovefields.	

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Site is an industrial property, with buildings of various ages, periods and levels of condition.	Site borders onto Tesco car park, with open land to rear and railway station to the other side.	Good access to the A50 via the Derby Road. Immediately adjacent to railway station.	Site appears to be active in part at least. Providing secondary industrial accommodation. Uttoxeter lacks this type of property.	Good	Good road and rail access, reasonable lettings / occupancy, wider appeal noted	No obvious restrictions.	N/A	Accessibility is good. Good access onto the roundabout.	Site is brownfield and is within the urban area.	N/A		Site is built out	This property is serving a function by providing secondary industrial premises in central Uttoxeter and so we see its worth, however it would make an excellent office/residential location being adjacent to the town centre and railway station. We note this site is identified in the SHLAA as site 102.	
The property is well maintained and consists of buildings of a mix of ages of various 20th century periods with some modern construction.	Surrounded entirely by residential.	Site is a reasonable distance from the train and is located in the centre of the urban area so access to anywhere in Uttoxeter is good. Strategic access out to the A38 is reasonable via Park Street.	This is a large factory to be in the centre and would be difficult to let as a whole or sell as a whole if Foxes are not in occupation. In terms of alternative uses this would be a prime residential redevelopment location.	Average	Central location, proximity to station and road access, appeal potentially limited to specific occupier	There may be issues with vehicle movements and access if the site had to go through the planning process.	N/A	Reasonable with direct access onto the New Road (A522).	Site is brownfield and is within the urban area.	N/A		Site is built out	Site is to be retained for employment use which we assume is to retain Foxes as a major employer locally. We support this but note that the site would be better used for alternative uses subject to Foxes relocating within Uttoxeter. Subject to relocation of occupiers, this site could become a residential site.	
Factory appears to currently be in single use although it is unclear how much of the building is in industrial use. Building appears to be secure and well maintained. Factory is entirely in a rural location and appears to have been located historically with associated workers houses. The factory is Mayfield Yarns limited.	Factory is entirely surrounded by agricultural land. It is bounded on two sides by the River Dove and has a number of residential units near by which were originally constructed for the factory workers.	Access is to the A52 via minor roads. There appears to be no frequent public transport.	We would not expect to find an occupier for a factory of this size in this location. We would expect there to be some demand for parts of the factory for industrial/storage purposes. We would expect there to be a high level of demand to convert this site into residential.	Poor	Appeal for specific user only, poor quality access	This would be subject to whether the property is listed or preserved in any way and also whether the site is on a flood plain.	N/A	Accessibility is not good due to narrow roads.	Site is brownfield and is within the urban area.	N/A		Site is built out	We would recommend the site be preserved for employment use if that helps to secure the current occupier. However due to the location, access and adjacent residential properties, etc we would foresee this site being in great demand for residential uses.	
Agricultural field in rural area.	Agricultural area with small village adjacent and Waterfront shopping centre and canal basin also adjacent.	Access is good onto the A38. No evidence of extensive public transport.	This is a good employment site and would have good demand.	Good	Good access, wider appeal	N/A	Rural land restrictions?	Access would need to be created and is dependent on use.	Site is outside of the urban area and is a greenfield location.	N/A	Poor	Potential environmental constraints, greenfield site	Site is currently undeveloped and in agricultural use we would only recommend this site to come forward for industrial uses if need can be shown.	
				Good	Excellent access to A50, good distribution location							Site is built out	Cross reference with site 121 for location. Site forms an extension of the JCB factory and is included in allocation 121. The site borders the balancing pond of the JCB plant and our concern would be if there was any flood risk on this site otherwise all comments as per site 121.	



East Staffordshire Employment Land Review Update

Employment Projections and Floorspace Requirements

09 October 2012

A report submitted by [GHK](#)

Date: 09 October 2012

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1 LEFM Baseline Scenario

Applies growth rates from the LEFM projections to ABI data (2010 base).

1.1 Employment Projections

Employment Projections - East Staffordshire
Baseline Scenario

	2010 Actual	2011	2016	2021	2026	2031
01 : Agriculture/hunting, etc.	41	31	30	29	28	27
02 : Forestry	2	2	1	1	1	1
08 : Mining & quarrying	59	55	52	49	48	46
10 : Manf. - food products	2,002	2,303	2,553	2,711	2,896	3,076
11 : Manf. - beverages	1,579	1,817	2,014	2,138	2,284	2,426
13 : Manf. - textiles	99	106	97	93	91	86
14 : Manf. - wearing apparel	41	44	40	39	37	36
15 : Manf. - leather & related products	13	14	13	12	12	11
16 : Manf. - wood & wood products	217	182	150	164	173	161
17 : Manf. - paper & paper products	47	39	33	36	37	35
18 : Printing & reproduction of recorded media	148	304	242	251	268	271
20 : Manf. - chemicals & chemical products	51	100	86	74	60	47
22 : Manf. - rubber & plastic products	180	213	192	172	162	151
23 : Manf. - other non-metallic mineral products	556	578	568	545	502	459
24 : Manf. - basic metals	53	38	30	26	22	18
25 : Manf. - fabricated metal products	750	750	815	814	796	772
26 : Manf. - computer, electronic & optical products	174	141	139	131	122	113
27 : Manf. - electrical equipment	28	22	21	18	16	14
28 : Manf. - other machinery & equipment	2,238	2,267	2,059	2,124	2,089	2,005
29 : Manf. - motor vehicles, trailers	420	415	415	402	383	369
30 : Manf. - other transport equipment	129	137	131	129	129	126
31 : Manf. - furniture	56	64	61	63	67	69
32 : Manf. - other manufacturing	25	28	27	28	30	31
33 : Repair & installation of machinery & equipment	428	434	394	406	399	383
35 : Electricity, gas, steam & air conditioning supply	57	57	57	57	57	57
36 : Water collection, treatment & supply	22	19	18	18	18	17
37 : Sewerage	58	60	62	65	68	70
38 : Waste collection, treatment & disposal	178	185	190	199	209	216
39 : Other waste management services	73	76	78	82	86	89
41 : Construction of buildings	417	362	385	406	415	424
42 : Civil engineering	225	195	208	219	224	229
43 : Specialised construction activities	1,965	1,706	1,813	1,912	1,956	1,998
45 : Wholesale, retail & repair of motor vehicles	1,553	1,720	1,766	1,818	1,861	1,895
46 : Wholesale trade	2,373	2,629	2,698	2,778	2,843	2,896
47 : Retail trade	5,388	5,606	5,319	5,369	5,382	5,476
49 : Land transport	1,128	1,362	1,523	1,664	1,840	2,009
52 : Warehousing & transportation support activities	1,413	1,706	1,908	2,084	2,304	2,517
53 : Postal & courier activities	874	928	881	822	778	730
55 : Accommodation	351	309	331	337	343	343
56 : Food & beverage services	2,884	2,537	2,716	2,768	2,820	2,820
58 : Publishing	65	134	106	110	118	119
59 : Film, video and TV production & music publishing	73	76	78	82	86	89
61 : Telecommunications	1,131	1,200	1,140	1,064	1,007	944
62 : Computer & related activities	1,022	515	573	663	763	883
63 : Information service activities	57	29	32	37	43	49
64 : Financial services	575	584	575	605	636	668
65 : Insurance & pension funding	9	8	8	9	10	12
66 : Auxiliary financial services	228	231	228	240	252	265
68 : Real estate activities	472	434	492	541	621	724
69 : Legal & accounting activities	477	439	497	547	628	732
70 : Head office & management consultancy activities	2,425	2,231	2,529	2,778	3,191	3,722
71 : Architecture & engineering	706	649	736	809	929	1,083
72 : Scientific research & development	64	59	67	73	84	96
73 : Advertising & market research	45	41	47	52	59	69
74 : Other professional, scientific & technical activities	85	78	89	97	112	130
75 : Veterinary activities	87	82	78	85	91	98
77 : Rental & leasing activities	349	422	462	519	606	655
78 : Employment activities	2,535	3,069	3,358	3,767	4,401	4,759
79 : Travel agencies & tour operators	97	117	129	144	168	182
80 : Security & investigation activities	224	271	297	333	389	420
81 : Building & landscape services	688	833	911	1,022	1,194	1,292
82 : Office administrative & other business support	495	599	656	736	859	929
84 : Public administration & defence	1,581	1,637	1,536	1,645	1,750	1,845
85 : Education	4,579	4,332	4,344	4,566	4,775	4,983
86 : Human health activities	5,876	5,531	5,301	5,715	6,157	6,639
87 : Residential care activities	1,191	1,121	1,074	1,158	1,248	1,346
88 : Social work activities without accommodation	950	894	857	924	995	1,073
90 : Creative, arts & entertainment activities	35	36	37	39	41	43
91 : Libraries, archives, museums & other cultural activities	66	69	71	74	77	80
92 : Gambling & betting activities	145	151	155	162	170	176
93 : Sports activities & amusement & recreation activities	952	990	1,018	1,066	1,117	1,156
94 : Activities of membership organisations	189	196	202	212	222	230
95 : Repair of computers & personal/household goods	7	7	7	8	8	9
96 : Other personal service activities	925	961	989	1,035	1,085	1,123
Total	56,700	57,568	58,797	61,967	65,748	69,148

Projected Growth Rates (% pa)

	2010- 2011	2011- 2016	2016- 2021	2021- 2026	2026- 2031
01 : Agriculture/hunting, etc.	-23.6%	-0.6%	-0.8%	-0.5%	-0.9%
02 : Forestry	-23.6%	-0.6%	-0.8%	-0.5%	-0.9%
08 : Mining & quarrying	-6.1%	-1.3%	-0.9%	-0.5%	-1.0%
10 : Manf. - food products	15.1%	2.1%	1.2%	1.3%	1.2%
11 : Manf. - beverages	15.1%	2.1%	1.2%	1.3%	1.2%
13 : Manf. - textiles	7.2%	-1.8%	-0.8%	-0.6%	-1.0%
14 : Manf. - wearing apparel	7.2%	-1.8%	-0.8%	-0.6%	-1.0%
15 : Manf. - leather & related products	7.2%	-1.8%	-0.8%	-0.6%	-1.0%
16 : Manf. - wood & wood products	-16.0%	-3.8%	1.8%	1.0%	-1.4%
17 : Manf. - paper & paper products	-16.0%	-3.8%	1.8%	1.0%	-1.4%
18 : Printing & reproduction of recorded media	105.6%	-4.5%	0.8%	1.3%	0.3%
20 : Manf. - chemicals & chemical products	95.2%	-2.8%	-3.0%	-4.3%	-4.5%
22 : Manf. - rubber & plastic products	18.1%	-2.0%	-2.1%	-1.2%	-1.4%
23 : Manf. - other non-metallic mineral products	4.0%	-0.3%	-0.8%	-1.6%	-1.8%
24 : Manf. - basic metals	-28.6%	-4.4%	-3.0%	-3.6%	-3.2%
25 : Manf. - fabricated metal products	0.0%	1.7%	0.0%	-0.5%	-0.6%
26 : Manf. - computer, electronic & optical products	-19.2%	-0.3%	-1.2%	-1.3%	-1.5%
27 : Manf. - electrical equipment	-20.4%	-1.6%	-2.9%	-2.0%	-3.0%
28 : Manf. - other machinery & equipment	1.3%	-1.9%	0.6%	-0.3%	-0.8%
29 : Manf. - motor vehicles, trailers	-1.1%	0.0%	-0.6%	-1.0%	-0.8%
30 : Manf. - other transport equipment	6.5%	-1.0%	-0.3%	0.0%	-0.4%
31 : Manf. - furniture	13.8%	-1.0%	0.7%	1.4%	0.6%
32 : Manf. - other manufacturing	13.8%	-1.0%	0.7%	1.4%	0.6%
33 : Repair & installation of machinery & equipment	1.3%	-1.9%	0.6%	-0.3%	-0.8%
35 : Electricity, gas, steam & air conditioning supply	0.0%	0.0%	0.0%	0.0%	0.0%
36 : Water collection, treatment & supply	-11.5%	-1.8%	0.0%	0.0%	-1.0%
37 : Sewerage	3.9%	0.6%	0.9%	0.9%	0.7%
38 : Waste collection, treatment & disposal	3.9%	0.6%	0.9%	0.9%	0.7%
39 : Other waste management services	3.9%	0.6%	0.9%	0.9%	0.7%
41 : Construction of buildings	-13.2%	1.2%	1.1%	0.5%	0.4%
42 : Civil engineering	-13.2%	1.2%	1.1%	0.5%	0.4%
43 : Specialised construction activities	-13.2%	1.2%	1.1%	0.5%	0.4%
45 : Wholesale, retail & repair of motor vehicles	-10.8%	0.5%	0.6%	0.5%	0.4%
46 : Wholesale trade	-10.8%	0.5%	0.6%	0.5%	0.4%
47 : Retail trade	4.0%	-1.0%	0.2%	0.0%	0.3%
49 : Land transport	20.7%	2.3%	1.8%	2.0%	1.8%
52 : Warehousing & transportation support activities	20.7%	2.3%	1.8%	2.0%	1.8%
53 : Postal & courier activities	6.1%	-1.0%	-1.4%	-1.1%	-1.3%
55 : Accommodation	-12.0%	1.4%	0.4%	0.4%	0.0%
56 : Food & beverage services	-12.0%	1.4%	0.4%	0.4%	0.0%
58 : Publishing	105.6%	-4.5%	0.8%	1.3%	0.3%
59 : Film, video and TV production & music publishing	3.9%	0.6%	0.9%	0.9%	0.7%
61 : Telecommunications	6.1%	-1.0%	-1.4%	-1.1%	-1.3%
62 : Computer & related activities	-49.6%	2.2%	2.9%	2.9%	3.0%
63 : Information service activities	-49.6%	2.2%	2.9%	2.9%	3.0%
64 : Financial services	1.5%	-0.3%	1.0%	1.0%	1.0%
65 : Insurance & pension funding	-12.5%	0.0%	2.7%	2.4%	4.1%
66 : Auxiliary financial services	1.5%	-0.3%	1.0%	1.0%	1.0%
68 : Real estate activities	-8.0%	2.5%	1.9%	2.8%	3.1%
69 : Legal & accounting activities	-8.0%	2.5%	1.9%	2.8%	3.1%
70 : Head office & management consultancy activities	-8.0%	2.5%	1.9%	2.8%	3.1%
71 : Architecture & engineering	-8.0%	2.5%	1.9%	2.8%	3.1%
72 : Scientific research & development	-8.0%	2.5%	1.9%	2.8%	3.1%
73 : Advertising & market research	-8.0%	2.5%	1.9%	2.8%	3.1%
74 : Other professional, scientific & technical activities	-8.0%	2.5%	1.9%	2.8%	3.1%
75 : Veterinary activities	-5.9%	-0.8%	1.5%	1.5%	1.5%
77 : Rental & leasing activities	21.0%	1.8%	2.3%	3.2%	1.6%
78 : Employment activities	21.0%	1.8%	2.3%	3.2%	1.6%
79 : Travel agencies & tour operators	21.0%	1.8%	2.3%	3.2%	1.6%
80 : Security & investigation activities	21.0%	1.8%	2.3%	3.2%	1.6%
81 : Building & landscape services	21.0%	1.8%	2.3%	3.2%	1.6%
82 : Office administrative & other business support	21.0%	1.8%	2.3%	3.2%	1.6%
84 : Public administration & defence	3.6%	-1.3%	1.4%	1.3%	1.1%
85 : Education	-5.4%	0.1%	1.0%	0.9%	0.9%
86 : Human health activities	-5.9%	-0.8%	1.5%	1.5%	1.5%
87 : Residential care activities	-5.9%	-0.8%	1.5%	1.5%	1.5%
88 : Social work activities without accommodation	-5.9%	-0.8%	1.5%	1.5%	1.5%
90 : Creative, arts & entertainment activities	3.9%	0.6%	0.9%	0.9%	0.7%
91 : Libraries, archives, museums & other cultural activities	3.9%	0.6%	0.9%	0.9%	0.7%
92 : Gambling & betting activities	3.9%	0.6%	0.9%	0.9%	0.7%
93 : Sports activities & amusement & recreation activities	3.9%	0.6%	0.9%	0.9%	0.7%
94 : Activities of membership organisations	3.9%	0.6%	0.9%	0.9%	0.7%
95 : Repair of computers & personal/household goods	3.9%	0.6%	0.9%	0.9%	0.7%
96 : Other personal service activities	3.9%	0.6%	0.9%	0.9%	0.7%
Total	1.5%	0.4%	1.1%	1.2%	1.0%

1.2 Floorspace Requirements

BASELINE SCENARIO

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	50,234	47,900	48,574	48,966	50,117
A2	143,050	138,842	142,796	150,490	160,460	172,246
A3	72,060	63,391	67,869	69,170	70,449	70,472
B1a	215,404	220,611	229,192	248,929	276,358	299,612
B1b	11,550	10,624	12,046	13,234	15,198	17,726
B1c	10,918	8,805	8,603	8,011	7,481	6,865
B2	396,875	433,516	438,300	451,822	461,393	466,351
B8	495,765	561,493	585,928	605,686	632,708	657,065
C1	8,007	7,043	7,541	7,686	7,828	7,830
Total	1,403,363	1,494,561	1,540,175	1,603,601	1,680,842	1,748,284

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		101%	96%	98%	98%	101%
A2		97%	100%	105%	112%	120%
A3		88%	94%	96%	98%	98%
B1a		102%	106%	116%	128%	139%
B1b		92%	104%	115%	132%	153%
B1c		81%	79%	73%	69%	63%
B2		109%	110%	114%	116%	118%
B8		113%	118%	122%	128%	133%
C1		88%	94%	96%	98%	98%
Total		106%	110%	114%	120%	125%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		500	-1,835	-1,161	-769	382
A2		-4,208	-254	7,440	17,410	29,196
A3		-8,668	-4,191	-2,889	-1,610	-1,588
B1a		5,206	13,787	33,525	60,954	84,208
B1b		-926	496	1,683	3,648	6,176
B1c		-2,113	-2,315	-2,907	-3,437	-4,053
B2		36,642	41,425	54,947	64,518	69,476
B8		65,729	90,163	109,921	136,944	161,300
C1		-963	-466	-321	-179	-176
Total		91,198	136,812	200,238	277,479	344,921

2 Experian Baseline Scenario

Applies growth rates from the Experian projections to ABI data (2010 base).

2.1 Employment Projections

Employment Projections - East Staffordshire
Experian Baseline Scenario

	2010 Actual	2011	2016	2021	2026	2031
01 : Agriculture/hunting, etc.	41	28	35	29	23	19
02 : Forestry	2	1	2	1	1	1
08 : Mining & quarrying	59	47	35	24	12	12
10 : Manf. - food products	2,002	1,946	1,852	1,787	1,698	1,618
11 : Manf. - beverages	1,579	1,535	1,461	1,409	1,339	1,276
13 : Manf. - textiles	99	107	50	25	17	8
14 : Manf. - wearing apparel	41	44	21	10	7	3
15 : Manf. - leather & related products	13	14	7	3	2	1
16 : Manf. - wood & wood products	217	217	142	92	58	33
17 : Manf. - paper & paper products	47	47	31	20	13	7
18 : Printing & reproduction of recorded media	148	148	148	135	135	121
20 : Manf. - chemicals & chemical products	51	40	28	23	17	11
22 : Manf. - rubber & plastic products	180	167	160	151	141	132
23 : Manf. - other non-metallic mineral products	556	516	494	465	437	408
24 : Manf. - basic metals	53	52	46	37	29	23
25 : Manf. - fabricated metal products	750	734	653	524	411	323
26 : Manf. - computer, electronic & optical products	174	200	191	148	122	96
27 : Manf. - electrical equipment	28	32	31	24	20	15
28 : Manf. - other machinery & equipment	2,238	2,500	2,332	1,901	1,573	1,283
29 : Manf. - motor vehicles, trailers	420	433	459	446	420	394
30 : Manf. - other transport equipment	129	133	141	137	129	121
31 : Manf. - furniture	56	53	51	49	44	39
32 : Manf. - other manufacturing	25	23	23	22	20	18
33 : Repair & installation of machinery & equipment	428	402	393	375	335	300
35 : Electricity, gas, steam & air conditioning supply	57	59	69	74	81	86
36 : Water collection, treatment & supply	22	23	27	28	31	33
37 : Sewerage	58	60	70	75	82	87
38 : Waste collection, treatment & disposal	178	185	215	230	252	267
39 : Other waste management services	73	76	88	94	103	110
41 : Construction of buildings	417	392	366	379	379	379
42 : Civil engineering	225	236	236	259	259	270
43 : Specialised construction activities	1,965	2,028	2,060	2,217	2,322	2,417
45 : Wholesale, retail & repair of motor vehicles	1,553	1,577	1,705	1,777	1,813	1,863
46 : Wholesale trade	2,373	2,410	2,605	2,715	2,771	2,832
47 : Retail trade	5,388	5,362	5,414	5,388	5,309	5,270
49 : Land transport	1,128	1,110	1,273	1,431	1,567	1,710
52 : Warehousing & transportation support activities	1,413	1,391	1,595	1,792	1,963	2,142
53 : Postal & courier activities	974	860	987	1,109	1,214	1,325
55 : Accommodation	351	320	337	338	332	324
56 : Food & beverage services	2,884	2,627	2,768	2,781	2,730	2,665
58 : Publishing	65	57	57	59	57	57
59 : Film, video and TV production & music publishing	73	63	63	67	63	63
61 : Telecommunications	1,131	1,098	1,297	1,231	1,164	1,081
62 : Computer & related activities	1,022	934	1,139	1,197	1,212	1,241
63 : Information service activities	57	52	64	67	68	69
64 : Financial services	575	544	598	622	629	637
65 : Insurance & pension funding	9	9	9	9	9	9
66 : Auxiliary financial services	228	216	237	246	250	253
68 : Real estate activities	472	549	606	606	592	571
69 : Legal & accounting activities	477	540	582	602	615	625
70 : Head office & management consultancy activities	2,425	2,747	2,959	3,061	3,129	3,180
71 : Architecture & engineering	706	800	852	891	911	926
72 : Scientific research & development	64	73	78	81	83	84
73 : Advertising & market research	45	51	55	57	58	59
74 : Other professional, scientific & technical activities	85	96	104	107	110	111
75 : Veterinary activities	87	86	90	97	103	109
77 : Rental & leasing activities	349	352	382	394	396	396
78 : Employment activities	2,535	2,557	2,773	2,859	2,873	2,873
79 : Travel agencies & tour operators	97	98	106	109	110	110
80 : Security & investigation activities	224	226	245	253	254	254
81 : Building & landscape services	688	694	753	776	780	780
82 : Office administrative & other business support	495	499	541	558	561	561
84 : Public administration & defence	1,581	1,472	1,004	1,014	1,014	1,024
85 : Education	4,579	4,508	4,551	4,734	5,031	5,328
86 : Human health activities	5,876	5,802	6,073	6,552	6,945	7,363
87 : Residential care activities	1,191	1,185	1,214	1,301	1,363	1,470
88 : Social work activities without accommodation	950	945	969	1,038	1,103	1,172
90 : Creative, arts & entertainment activities	35	34	37	36	36	35
91 : Libraries, archives, museums & other cultural activities	66	64	69	69	68	66
92 : Gambling & betting activities	145	141	153	151	149	145
93 : Sports activities & amusement & recreation activities	952	927	1,001	989	977	952
94 : Activities of membership organisations	189	243	254	254	249	243
95 : Repair of computers & personal/household goods	7	9	9	9	9	9
96 : Other personal service activities	925	1,191	1,242	1,242	1,216	1,191
Total	56,700	57,000	58,775	59,863	60,417	61,081

Projected Growth Rates (% pa)

	2010- 2011	2011- 2016	2016- 2021	2021- 2026	2026- 2031
01 : Agriculture/hunting, etc.	-31.5%	4.2%	-3.4%	-4.5%	-3.9%
02 : Forestry	-31.5%	4.2%	-3.4%	-4.5%	-3.9%
08 : Mining & quarrying	-20.0%	-5.6%	-7.8%	-12.9%	0.0%
10 : Manf. - food products	-2.8%	-1.0%	-0.7%	-1.0%	-1.0%
11 : Manf. - beverages	-2.8%	-1.0%	-0.7%	-1.0%	-1.0%
13 : Manf. - textiles	8.3%	-14.3%	-12.9%	-7.8%	-12.9%
14 : Manf. - wearing apparel	8.3%	-14.3%	-12.9%	-7.8%	-12.9%
15 : Manf. - leather & related products	8.3%	-14.3%	-12.9%	-7.8%	-12.9%
16 : Manf. - wood & wood products	0.0%	-8.1%	-8.3%	-8.6%	-10.6%
17 : Manf. - paper & paper products	0.0%	-8.1%	-8.3%	-8.6%	-10.6%
18 : Printing & reproduction of recorded media	0.0%	0.0%	-1.9%	0.0%	-2.1%
20 : Manf. - chemicals & chemical products	-22.2%	-6.5%	-4.4%	-5.6%	-7.8%
22 : Manf. - rubber & plastic products	-7.1%	-0.9%	-1.2%	-1.3%	-1.3%
23 : Manf. - other non-metallic mineral products	-7.1%	-0.9%	-1.2%	-1.3%	-1.3%
24 : Manf. - basic metals	-2.2%	-2.3%	-4.3%	-4.7%	-4.7%
25 : Manf. - fabricated metal products	-2.2%	-2.3%	-4.3%	-4.7%	-4.7%
26 : Manf. - computer, electronic & optical products	15.0%	-0.9%	-5.0%	-3.8%	-4.7%
27 : Manf. - electrical equipment	15.0%	-0.9%	-5.0%	-3.8%	-4.7%
28 : Manf. - other machinery & equipment	11.7%	-1.4%	-4.0%	-3.7%	-4.0%
29 : Manf. - motor vehicles, trailers	3.1%	1.2%	-0.6%	-1.2%	-1.3%
30 : Manf. - other transport equipment	3.1%	1.2%	-0.6%	-1.2%	-1.3%
31 : Manf. - furniture	-6.2%	-0.4%	-0.9%	-2.2%	-2.2%
32 : Manf. - other manufacturing	-6.2%	-0.4%	-0.9%	-2.2%	-2.2%
33 : Repair & installation of machinery & equipment	-6.2%	-0.4%	-0.9%	-2.2%	-2.2%
35 : Electricity, gas, steam & air conditioning supply	4.2%	3.0%	1.3%	1.9%	1.1%
36 : Water collection, treatment & supply	4.2%	3.0%	1.3%	1.9%	1.1%
37 : Sewerage	4.2%	3.0%	1.3%	1.9%	1.1%
38 : Waste collection, treatment & disposal	4.2%	3.0%	1.3%	1.9%	1.1%
39 : Other waste management services	4.2%	3.0%	1.3%	1.9%	1.1%
41 : Construction of buildings	-6.1%	-1.3%	0.7%	0.0%	0.0%
42 : Civil engineering	5.0%	0.0%	1.8%	0.0%	0.9%
43 : Specialised construction activities	3.2%	0.3%	1.5%	0.9%	0.8%
45 : Wholesale, retail & repair of motor vehicles	1.5%	1.6%	0.8%	0.4%	0.4%
46 : Wholesale trade	1.5%	1.6%	0.8%	0.4%	0.4%
47 : Retail trade	-0.5%	0.2%	-0.1%	-0.3%	-0.1%
49 : Land transport	-1.6%	2.8%	2.4%	1.8%	1.8%
52 : Warehousing & transportation support activities	-1.6%	2.8%	2.4%	1.8%	1.8%
53 : Postal & courier activities	-1.6%	2.8%	2.4%	1.8%	1.8%
55 : Accommodation	-8.9%	1.1%	0.1%	-0.4%	-0.5%
56 : Food & beverage services	-8.9%	1.1%	0.1%	-0.4%	-0.5%
58 : Publishing	-13.0%	0.0%	1.0%	-1.0%	0.0%
59 : Film, video and TV production & music publishing	-13.0%	0.0%	1.0%	-1.0%	0.0%
61 : Telecommunications	-2.9%	3.4%	-1.0%	-1.1%	-1.5%
62 : Computer & related activities	-8.6%	4.0%	1.0%	0.2%	0.5%
63 : Information service activities	-8.6%	4.0%	1.0%	0.2%	0.5%
64 : Financial services	-5.4%	1.9%	0.8%	0.2%	0.2%
65 : Insurance & pension funding	0.0%	0.6%	0.0%	0.0%	-0.2%
66 : Auxiliary financial services	-5.4%	1.9%	0.8%	0.2%	0.2%
68 : Real estate activities	16.4%	2.0%	0.0%	-0.5%	-0.7%
69 : Legal & accounting activities	13.3%	1.5%	0.7%	0.4%	0.3%
70 : Head office & management consultancy activities	13.3%	1.5%	0.7%	0.4%	0.3%
71 : Architecture & engineering	13.3%	1.5%	0.7%	0.4%	0.3%
72 : Scientific research & development	13.3%	1.5%	0.7%	0.4%	0.3%
73 : Advertising & market research	13.3%	1.5%	0.7%	0.4%	0.3%
74 : Other professional, scientific & technical activities	13.3%	1.5%	0.7%	0.4%	0.3%
75 : Veterinary activities	-1.3%	0.9%	1.5%	1.2%	1.2%
77 : Rental & leasing activities	0.9%	1.6%	0.6%	0.1%	0.0%
78 : Employment activities	0.9%	1.6%	0.6%	0.1%	0.0%
79 : Travel agencies & tour operators	0.9%	1.6%	0.6%	0.1%	0.0%
80 : Security & investigation activities	0.9%	1.6%	0.6%	0.1%	0.0%
81 : Building & landscape services	0.9%	1.6%	0.6%	0.1%	0.0%
82 : Office administrative & other business support	0.9%	1.6%	0.6%	0.1%	0.0%
84 : Public administration & defence	-6.9%	-7.4%	0.2%	0.0%	0.2%
85 : Education	-1.5%	0.2%	0.8%	1.2%	1.2%
86 : Human health activities	-1.3%	0.9%	1.5%	1.2%	1.2%
87 : Residential care activities	-0.5%	0.5%	1.4%	1.2%	1.2%
88 : Social work activities without accommodation	-0.5%	0.5%	1.4%	1.2%	1.2%
90 : Creative, arts & entertainment activities	-2.6%	1.6%	-0.2%	-0.3%	-0.5%
91 : Libraries, archives, museums & other cultural activities	-2.6%	1.6%	-0.2%	-0.3%	-0.5%
92 : Gambling & betting activities	-2.6%	1.6%	-0.2%	-0.3%	-0.5%
93 : Sports activities & amusement & recreation activities	-2.6%	1.6%	-0.2%	-0.3%	-0.5%
94 : Activities of membership organisations	28.8%	0.8%	0.0%	-0.4%	-0.4%
95 : Repair of computers & personal/household goods	28.8%	0.8%	0.0%	-0.4%	-0.4%
96 : Other personal service activities	28.8%	0.8%	0.0%	-0.4%	-0.4%
Total	0.5%	0.6%	0.4%	0.2%	0.2%

2.2 Floorspace Requirements

EXPERIAN BASELINE SCENARIO

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	49,265	50,285	50,218	49,573	49,311
A2	143,050	152,361	162,119	163,781	163,169	162,395
A3	72,060	65,626	69,164	69,486	68,199	66,591
B1a	215,404	218,417	223,735	231,392	235,282	238,988
B1b	11,550	13,125	14,176	14,607	14,856	15,014
B1c	10,918	12,556	12,010	9,280	7,643	6,005
B2	396,875	400,212	381,867	352,055	323,954	299,351
B8	495,765	492,050	555,975	593,960	623,478	653,578
C1	8,007	7,292	7,685	7,721	7,578	7,399
Total	1,403,363	1,410,902	1,477,016	1,492,500	1,493,731	1,498,632

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		99%	101%	101%	100%	99%
A2		107%	113%	114%	114%	114%
A3		91%	96%	96%	95%	92%
B1a		101%	104%	107%	109%	111%
B1b		114%	123%	126%	129%	130%
B1c		115%	110%	85%	70%	55%
B2		101%	96%	89%	82%	75%
B8		99%	112%	120%	126%	132%
C1		91%	96%	96%	95%	92%
Total		101%	105%	106%	106%	107%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		-470	550	483	-161	-423
A2		9,311	19,069	20,731	20,119	19,345
A3		-6,434	-2,895	-2,574	-3,860	-5,469
B1a		3,012	8,331	15,988	19,877	23,583
B1b		1,575	2,625	3,056	3,306	3,464
B1c		1,638	1,092	-1,638	-3,275	-4,913
B2		3,337	-15,008	-44,820	-72,921	-97,523
B8		-3,715	60,210	98,196	127,713	157,813
C1		-715	-322	-286	-429	-608
Total		7,539	73,652	89,136	90,367	95,269

3 Past Trend Scenario (15 Year Trend)

Calculates a 15 year trend from historic LEFM data (1995 to 2010) and applies this to ABI data (2010 base).

This is done for each sector and is then adjusted to take account of unrealistic growth rates and to ensure that the total of the sectors matches the projected growth in total employment (when the 15 year trend is applied).

3.1 Employment Projections

Employment Projections - East Staffordshire
Past Trends Scenario (15 Year Trend)

	2010 Actual	2011	2016	2021	2026	2031
01 - Agriculture/hunting, etc.	41	41	43	44	45	47
02 - Forestry	2	2	2	2	2	2
08 - Mining & quarrying	59	58	54	49	45	42
10 - Manf. - food products	2,002	1,966	1,796	1,641	1,499	1,370
11 - Manf. - beverages	1,579	1,551	1,417	1,294	1,183	1,080
13 - Manf. - textiles	99	97	89	82	75	69
14 - Manf. - wearing apparel	41	40	37	34	31	28
15 - Manf. - leather & related products	13	13	12	11	10	9
16 - Manf. - wood & wood products	217	213	195	179	164	150
17 - Manf. - paper & paper products	47	46	42	39	36	33
18 - Printing & reproduction of recorded media	148	145	129	115	102	91
20 - Manf. - chemicals & chemical products	51	49	40	33	27	22
22 - Manf. - rubber & plastic products	180	171	134	105	82	65
23 - Manf. - other non-metallic mineral products	556	567	629	696	771	854
24 - Manf. - basic metals	53	51	45	38	33	29
25 - Manf. - fabricated metal products	750	737	674	617	565	517
26 - Manf. - computer, electronic & optical products	174	172	165	157	150	143
27 - Manf. - electrical equipment	28	27	24	22	19	17
28 - Manf. - other machinery & equipment	2,238	2,208	2,065	1,931	1,806	1,688
29 - Manf. - motor vehicles, trailers	420	434	509	597	701	823
30 - Manf. - other transport equipment	129	136	178	232	304	397
31 - Manf. - furniture	56	56	55	54	53	52
32 - Manf. - other manufacturing	25	25	25	24	24	23
33 - Repair & installation of machinery & equipment	428	422	395	369	345	323
35 - Electricity, gas, steam & air conditioning supply	57	43	10	2	1	0
36 - Water collection, treatment & supply	22	21	17	14	11	9
37 - Sewerage	58	58	60	61	63	64
38 - Waste collection, treatment & disposal	178	179	183	188	192	197
39 - Other waste management services	73	73	75	77	79	81
41 - Construction of buildings	417	420	432	446	459	474
42 - Civil engineering	225	226	233	241	248	256
43 - Specialised construction activities	1,965	1,977	2,038	2,100	2,165	2,232
45 - Wholesale, retail & repair of motor vehicles	1,553	1,531	1,428	1,332	1,242	1,158
46 - Wholesale trade	2,373	2,340	2,192	2,035	1,917	1,769
47 - Retail trade	5,388	5,401	5,467	5,533	5,600	5,668
49 - Land transport	1,128	1,145	1,234	1,331	1,434	1,546
52 - Warehousing & transportation support activities	1,413	1,434	1,546	1,667	1,797	1,937
53 - Postal & courier activities	874	900	1,041	1,205	1,394	1,613
55 - Accommodation	351	355	375	395	417	441
56 - Food & beverage services	2,884	2,915	3,077	3,248	3,429	3,619
58 - Publishing	65	64	57	50	45	40
59 - Film, video and TV production & music publishing	73	73	75	77	79	81
61 - Telecommunications	1,131	1,164	1,347	1,559	1,804	2,087
62 - Computer & related activities	1,022	1,068	1,328	1,653	2,056	2,558
63 - Information service activities	57	60	74	92	115	143
64 - Financial services	575	576	582	588	594	601
65 - Insurance & pension funding	9	9	7	6	5	4
66 - Auxiliary financial services	228	228	231	233	236	238
68 - Real estate activities	472	486	565	655	761	884
69 - Legal & accounting activities	477	491	571	662	769	893
70 - Head office & management consultancy activities	2,425	2,498	2,901	3,368	3,910	4,539
71 - Architecture & engineering	706	727	845	980	1,138	1,322
72 - Scientific research & development	64	66	77	89	103	120
73 - Advertising & market research	45	46	54	62	73	84
74 - Other professional, scientific & technical activities	85	88	102	118	137	159
75 - Veterinary activities	87	88	95	103	111	120
77 - Rental & leasing activities	349	359	415	480	554	640
78 - Employment activities	2,535	2,609	3,015	3,463	4,024	4,649
79 - Travel agencies & tour operators	97	100	115	133	154	178
80 - Security & investigation activities	224	231	256	308	356	411
81 - Building & landscape services	688	708	818	945	1,092	1,262
82 - Office administrative & other business support	495	510	589	680	786	908
84 - Public administration & defence	1,581	1,602	1,709	1,823	1,945	2,075
85 - Education	4,579	4,642	4,970	5,321	5,697	6,099
86 - Human health activities	5,876	5,966	6,436	6,944	7,491	8,082
87 - Residential care activities	1,191	1,209	1,305	1,407	1,518	1,638
88 - Social work activities without accommodation	950	965	1,041	1,123	1,211	1,307
90 - Creative, arts & entertainment activities	35	35	36	37	38	39
91 - Libraries, archives, museums & other cultural activities	66	66	68	70	71	73
92 - Gambling & betting activities	145	146	149	153	156	160
93 - Sports activities & amusement & recreation activities	952	957	979	1,003	1,027	1,052
94 - Activities of membership organisations	189	190	194	199	204	209
95 - Repair of computers & personal/household goods	7	7	7	7	8	8
96 - Other personal service activities	925	929	952	975	998	1,022
Total	56,700	57,212	60,125	63,627	67,766	72,618

Projected Growth Rates (% pa)

	2010- 2011	2011- 2016	2016- 2021	2021- 2026	2026- 2031
01 - Agriculture/hunting, etc.	0.6%	0.6%	0.6%	0.6%	0.6%
02 - Forestry	0.6%	0.6%	0.6%	0.6%	0.6%
08 - Mining & quarrying	-1.6%	-1.6%	-1.6%	-1.6%	-1.6%
10 - Manf. - food products	-1.8%	-1.8%	-1.8%	-1.8%	-1.8%
11 - Manf. - beverages	-1.8%	-1.8%	-1.8%	-1.8%	-1.8%
13 - Manf. - textiles	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
14 - Manf. - wearing apparel	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
15 - Manf. - leather & related products	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
16 - Manf. - wood & wood products	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
17 - Manf. - paper & paper products	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
18 - Printing & reproduction of recorded media	-2.3%	-2.3%	-2.3%	-2.3%	-2.3%
20 - Manf. - chemicals & chemical products	-3.8%	-3.8%	-3.8%	-3.8%	-3.8%
22 - Manf. - rubber & plastic products	-4.8%	-4.8%	-4.8%	-4.8%	-4.8%
23 - Manf. - other non-metallic mineral products	2.1%	2.1%	2.1%	2.1%	2.1%
24 - Manf. - basic metals	-2.9%	-2.9%	-2.9%	-2.9%	-2.9%
25 - Manf. - fabricated metal products	-1.8%	-1.8%	-1.8%	-1.8%	-1.8%
26 - Manf. - computer, electronic & optical products	-0.9%	-0.9%	-0.9%	-0.9%	-0.9%
27 - Manf. - electrical equipment	-2.2%	-2.2%	-2.2%	-2.2%	-2.2%
28 - Manf. - other machinery & equipment	-1.3%	-1.3%	-1.3%	-1.3%	-1.3%
29 - Manf. - motor vehicles, trailers	3.3%	3.3%	3.3%	3.3%	3.3%
30 - Manf. - other transport equipment	5.5%	5.5%	5.5%	5.5%	5.5%
31 - Manf. - furniture	-0.3%	-0.3%	-0.3%	-0.3%	-0.3%
32 - Manf. - other manufacturing	-0.3%	-0.3%	-0.3%	-0.3%	-0.3%
33 - Repair & installation of machinery & equipment	-1.3%	-1.3%	-1.3%	-1.3%	-1.3%
35 - Electricity, gas, steam & air conditioning supply	-25.0%	-25.0%	-25.0%	-25.0%	-25.0%
36 - Water collection, treatment & supply	-4.3%	-4.3%	-4.3%	-4.3%	-4.3%
37 - Sewerage	0.5%	0.5%	0.5%	0.5%	0.5%
38 - Waste collection, treatment & disposal	0.5%	0.5%	0.5%	0.5%	0.5%
39 - Other waste management services	0.5%	0.5%	0.5%	0.5%	0.5%
41 - Construction of buildings	0.6%	0.6%	0.6%	0.6%	0.6%
42 - Civil engineering	0.6%	0.6%	0.6%	0.6%	0.6%
43 - Specialised construction activities	0.6%	0.6%	0.6%	0.6%	0.6%
45 - Wholesale, retail & repair of motor vehicles	-1.4%	-1.4%	-1.4%	-1.4%	-1.4%
46 - Wholesale trade	-1.4%	-1.4%	-1.4%	-1.4%	-1.4%
47 - Retail trade	0.2%	0.2%	0.2%	0.2%	0.2%
49 - Land transport	1.5%	1.5%	1.5%	1.5%	1.5%
52 - Warehousing & transportation support activities	1.5%	1.5%	1.5%	1.5%	1.5%
53 - Postal & courier activities	3.0%	3.0%	3.0%	3.0%	3.0%
55 - Accommodation	1.1%	1.1%	1.1%	1.1%	1.1%
56 - Food & beverage services	1.1%	1.1%	1.1%	1.1%	1.1%
58 - Publishing	-2.3%	-2.3%	-2.3%	-2.3%	-2.3%
59 - Film, video and TV production & music publishing	0.5%	0.5%	0.5%	0.5%	0.5%
61 - Telecommunications	3.0%	3.0%	3.0%	3.0%	3.0%
62 - Computer & related activities	4.5%	4.5%	4.5%	4.5%	4.5%
63 - Information service activities	4.5%	4.5%	4.5%	4.5%	4.5%
64 - Financial services	0.2%	0.2%	0.2%	0.2%	0.2%
65 - Insurance & pension funding	-4.0%	-4.0%	-4.0%	-4.0%	-4.0%
66 - Auxiliary financial services	0.2%	0.2%	0.2%	0.2%	0.2%
68 - Real estate activities	3.0%	3.0%	3.0%	3.0%	3.0%
69 - Legal & accounting activities	3.0%	3.0%	3.0%	3.0%	3.0%
70 - Head office & management consultancy activities	3.0%	3.0%	3.0%	3.0%	3.0%
71 - Architecture & engineering	3.0%	3.0%	3.0%	3.0%	3.0%
72 - Scientific research & development	3.0%	3.0%	3.0%	3.0%	3.0%
73 - Advertising & market research	3.0%	3.0%	3.0%	3.0%	3.0%
74 - Other professional, scientific & technical activities	3.0%	3.0%	3.0%	3.0%	3.0%
75 - Veterinary activities	1.5%	1.5%	1.5%	1.5%	1.5%
77 - Rental & leasing activities	2.9%	2.9%	2.9%	2.9%	2.9%
78 - Employment activities	2.9%	2.9%	2.9%	2.9%	2.9%
79 - Travel agencies & tour operators	2.9%	2.9%	2.9%	2.9%	2.9%
80 - Security & investigation activities	2.9%	2.9%	2.9%	2.9%	2.9%
81 - Building & landscape services	2.9%	2.9%	2.9%	2.9%	2.9%
82 - Office administrative & other business support	2.9%	2.9%	2.9%	2.9%	2.9%
84 - Public administration & defence	1.3%	1.3%	1.3%	1.3%	1.3%
85 - Education	1.4%	1.4%	1.4%	1.4%	1.4%
86 - Human health activities	1.5%	1.5%	1.5%	1.5%	1.5%
87 - Residential care activities	1.5%	1.5%	1.5%	1.5%	1.5%
88 - Social work activities without accommodation	1.5%	1.5%	1.5%	1.5%	1.5%
90 - Creative, arts & entertainment activities	0.5%	0.5%	0.5%	0.5%	0.5%
91 - Libraries, archives, museums & other cultural activities	0.5%	0.5%	0.5%	0.5%	0.5%
92 - Gambling & betting activities	0.5%	0.5%	0.5%	0.5%	0.5%
93 - Sports activities & amusement & recreation activities	0.5%	0.5%	0.5%	0.5%	0.5%
94 - Activities of membership organisations	0.5%	0.5%	0.5%	0.5%	0.5%
95 - Repair of computers & personal/household goods	0.5%	0.5%	0.5%	0.5%	0.5%
96 - Other personal service activities	0.5%	0.5%	0.5%	0.5%	0.5%
Total	0.9%	1.0%	1.1%	1.3%	1.4%

3.2 Floorspace Requirements

PAST TRENDS SCENARIO (15 YEAR TREND)

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	49,974	51,264	52,737	54,435	56,411
A2	143,050	144,877	154,846	166,398	179,838	195,532
A3	72,060	72,843	76,891	81,164	85,674	90,435
B1a	215,404	219,605	242,605	269,100	299,543	334,545
B1b	11,550	11,901	13,816	16,041	18,623	21,622
B1c	10,918	10,797	10,217	9,673	9,162	8,682
B2	396,875	392,215	371,118	353,649	339,824	329,750
B8	495,765	500,475	527,081	559,167	597,331	642,272
C1	8,007	8,094	8,543	9,018	9,519	10,048
Total	1,403,363	1,410,781	1,456,383	1,516,947	1,593,948	1,689,297

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		100%	103%	106%	109%	113%
A2		101%	108%	116%	126%	137%
A3		101%	107%	113%	119%	126%
B1a		102%	113%	125%	139%	155%
B1b		103%	120%	139%	161%	187%
B1c		99%	94%	89%	84%	80%
B2		99%	94%	89%	86%	83%
B8		101%	106%	113%	120%	130%
C1		101%	107%	113%	119%	126%
Total		101%	104%	108%	114%	120%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		239	1,529	3,002	4,700	6,676
A2		1,827	11,796	23,348	36,788	52,482
A3		784	4,832	9,104	13,615	18,376
B1a		4,201	27,201	53,696	84,138	119,140
B1b		350	2,266	4,490	7,073	10,071
B1c		-121	-701	-1,245	-1,756	-2,236
B2		-4,659	-25,756	-43,225	-57,051	-67,125
B8		4,710	31,317	63,402	101,566	146,507
C1		87	537	1,012	1,513	2,042
Total		7,418	53,020	113,584	190,585	285,934

4 Past Trend Scenario (25 Year Trend)

Calculates a 25 year trend from historic LFM data (1985 to 2010) and applies this to ABI data (2010 base).

This is done for each sector and is then adjusted to take account of unrealistic growth rates and to ensure that the total of the sectors matches the projected growth in total employment (when the 25 year trend is applied).

4.1 Employment Projections

Employment Projections - East Staffordshire
Past Trends Scenario (25 Year Trend)

	2010 Actual	2011	2016	2021	2026	2031
01 : Agriculture/hunting, etc.	41	40	35	31	28	25
02 : Forestry	2	2	2	2	1	1
08 : Mining & quarrying	59	58	54	50	46	43
10 : Manf. - food products	2,002	1,970	1,817	1,675	1,545	1,425
11 : Manf. - beverages	1,579	1,554	1,433	1,321	1,219	1,124
13 : Manf. - textiles	99	97	88	80	72	66
14 : Manf. - wearing apparel	41	40	36	33	30	27
15 : Manf. - leather & related products	13	13	12	10	10	9
16 : Manf. - wood & wood products	217	217	219	221	222	224
17 : Manf. - paper & paper products	47	47	47	48	48	49
18 : Printing & reproduction of recorded media	148	144	127	112	98	86
20 : Manf. - chemicals & chemical products	51	51	49	47	45	43
22 : Manf. - rubber & plastic products	180	175	154	135	118	104
23 : Manf. - other non-metallic mineral products	556	542	479	423	374	330
24 : Manf. - basic metals	53	52	46	40	36	31
25 : Manf. - fabricated metal products	750	737	677	622	571	524
26 : Manf. - computer, electronic & optical products	174	176	188	201	215	229
27 : Manf. - electrical equipment	28	28	30	31	32	34
28 : Manf. - other machinery & equipment	2,238	2,254	2,333	2,415	2,500	2,588
29 : Manf. - motor vehicles, trailers	420	437	535	653	799	977
30 : Manf. - other transport equipment	129	129	128	128	127	126
31 : Manf. - furniture	56	57	65	73	82	92
32 : Manf. - other manufacturing	25	26	29	32	36	41
33 : Repair & installation of machinery & equipment	428	431	446	462	478	495
35 : Electricity, gas, steam & air conditioning supply	57	43	10	2	1	0
36 : Water collection, treatment & supply	22	21	19	17	15	13
37 : Sewerage	58	59	64	69	74	80
38 : Waste collection, treatment & disposal	178	181	195	210	227	245
39 : Other waste management services	73	74	80	86	93	100
41 : Construction of buildings	417	418	421	425	429	433
42 : Civil engineering	225	225	227	229	231	233
43 : Specialised construction activities	1,965	1,968	1,986	2,003	2,021	2,039
45 : Wholesale, retail & repair of motor vehicles	1,553	1,550	1,534	1,519	1,504	1,489
46 : Wholesale trade	2,373	2,368	2,345	2,321	2,298	2,275
47 : Retail trade	5,388	5,401	5,464	5,528	5,592	5,658
49 : Land transport	1,128	1,143	1,223	1,309	1,400	1,498
52 : Warehousing & transportation support activities	1,413	1,432	1,532	1,640	1,754	1,877
53 : Postal & courier activities	874	887	956	1,031	1,111	1,198
55 : Accommodation	351	344	309	277	249	224
56 : Food & beverage services	2,884	2,823	2,536	2,279	2,048	1,840
58 : Publishing	65	63	56	49	43	38
59 : Film, video and TV production & music publishing	73	74	80	86	93	100
61 : Telecommunications	1,131	1,148	1,237	1,334	1,438	1,550
62 : Computer & related activities	1,022	1,045	1,167	1,303	1,455	1,625
63 : Information service activities	57	58	65	73	81	91
64 : Financial services	575	572	557	542	527	513
65 : Insurance & pension funding	9	9	7	6	5	4
66 : Auxiliary financial services	228	227	221	215	209	203
68 : Real estate activities	472	479	514	552	593	637
69 : Legal & accounting activities	477	484	520	558	600	644
70 : Head office & management consultancy activities	2,425	2,460	2,642	2,838	3,048	3,274
71 : Architecture & engineering	706	716	769	826	887	953
72 : Scientific research & development	64	65	70	75	80	86
73 : Advertising & market research	45	46	49	53	57	61
74 : Other professional, scientific & technical activities	85	86	93	99	107	115
75 : Veterinary activities	87	88	93	99	105	111
77 : Rental & leasing activities	349	353	377	402	428	457
78 : Employment activities	2,535	2,568	2,737	2,910	3,111	3,316
79 : Travel agencies & tour operators	97	98	105	112	119	127
80 : Security & investigation activities	224	227	242	258	275	293
81 : Building & landscape services	688	697	743	792	844	900
82 : Office administrative & other business support	495	501	534	570	607	648
84 : Public administration & defence	1,581	1,581	1,583	1,585	1,587	1,589
85 : Education	4,579	4,668	5,142	5,664	6,239	6,872
86 : Human health activities	5,876	5,945	6,300	6,676	7,075	7,498
87 : Residential care activities	1,191	1,205	1,277	1,363	1,434	1,520
88 : Social work activities without accommodation	950	961	1,019	1,079	1,144	1,212
90 : Creative, arts & entertainment activities	35	36	38	41	45	48
91 : Libraries, archives, museums & other cultural activities	66	67	72	78	84	91
92 : Gambling & betting activities	145	147	159	171	185	200
93 : Sports activities & amusement & recreation activities	952	967	1,043	1,125	1,214	1,310
94 : Activities of membership organisations	189	192	207	223	241	260
95 : Repair of computers & personal/household goods	7	7	8	8	9	10
96 : Other personal service activities	925	939	1,013	1,093	1,180	1,273
Total	56,700	56,994	58,668	60,648	62,929	65,521

Projected Growth Rates (% pa)

	2010- 2011	2011- 2016	2016- 2021	2021- 2026	2026- 2031
01 : Agriculture/hunting, etc.	-2.4%	-2.4%	-2.4%	-2.4%	-2.4%
02 : Forestry	-2.4%	-2.4%	-2.4%	-2.4%	-2.4%
08 : Mining & quarrying	-1.5%	-1.5%	-1.5%	-1.5%	-1.5%
10 : Manf. - food products	-1.6%	-1.6%	-1.6%	-1.6%	-1.6%
11 : Manf. - beverages	-1.6%	-1.6%	-1.6%	-1.6%	-1.6%
13 : Manf. - textiles	-1.9%	-1.9%	-1.9%	-1.9%	-1.9%
14 : Manf. - wearing apparel	-1.9%	-1.9%	-1.9%	-1.9%	-1.9%
15 : Manf. - leather & related products	-1.9%	-1.9%	-1.9%	-1.9%	-1.9%
16 : Manf. - wood & wood products	0.2%	0.2%	0.2%	0.2%	0.2%
17 : Manf. - paper & paper products	0.2%	0.2%	0.2%	0.2%	0.2%
18 : Printing & reproduction of recorded media	-2.5%	-2.5%	-2.5%	-2.5%	-2.5%
20 : Manf. - chemicals & chemical products	-0.8%	-0.8%	-0.8%	-0.8%	-0.8%
22 : Manf. - rubber & plastic products	-2.6%	-2.6%	-2.6%	-2.6%	-2.6%
23 : Manf. - other non-metallic mineral products	-2.5%	-2.5%	-2.5%	-2.5%	-2.5%
24 : Manf. - basic metals	-2.4%	-2.4%	-2.4%	-2.4%	-2.4%
25 : Manf. - fabricated metal products	-1.7%	-1.7%	-1.7%	-1.7%	-1.7%
26 : Manf. - computer, electronic & optical products	1.3%	1.3%	1.3%	1.3%	1.3%
27 : Manf. - electrical equipment	0.9%	0.9%	0.9%	0.9%	0.9%
28 : Manf. - other machinery & equipment	0.7%	0.7%	0.7%	0.7%	0.7%
29 : Manf. - motor vehicles, trailers	4.1%	4.1%	4.1%	4.1%	4.1%
30 : Manf. - other transport equipment	-0.1%	-0.1%	-0.1%	-0.1%	-0.1%
31 : Manf. - furniture	2.4%	2.4%	2.4%	2.4%	2.4%
32 : Manf. - other manufacturing	2.4%	2.4%	2.4%	2.4%	2.4%
33 : Repair & installation of machinery & equipment	0.7%	0.7%	0.7%	0.7%	0.7%
35 : Electricity, gas, steam & air conditioning supply	-25.1%	-25.1%	-25.1%	-25.1%	-25.1%
36 : Water collection, treatment & supply	-2.6%	-2.6%	-2.6%	-2.6%	-2.6%
37 : Sewerage	1.5%	1.5%	1.5%	1.5%	1.5%
38 : Waste collection, treatment & disposal	1.5%	1.5%	1.5%	1.5%	1.5%
39 : Other waste management services	1.5%	1.5%	1.5%	1.5%	1.5%
41 : Construction of buildings	0.2%	0.2%	0.2%	0.2%	0.2%
42 : Civil engineering	0.2%	0.2%	0.2%	0.2%	0.2%
43 : Specialised construction activities	0.2%	0.2%	0.2%	0.2%	0.2%
45 : Wholesale, retail & repair of motor vehicles	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%
46 : Wholesale trade	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%
47 : Retail trade	0.2%	0.2%	0.2%	0.2%	0.2%
49 : Land transport	1.4%	1.4%	1.4%	1.4%	1.4%
52 : Warehousing & transportation support activities	1.4%	1.4%	1.4%	1.4%	1.4%
53 : Postal & courier activities	1.5%	1.5%	1.5%	1.5%	1.5%
55 : Accommodation	-2.1%	-2.1%	-2.1%	-2.1%	-2.1%
56 : Food & beverage services	-2.1%	-2.1%	-2.1%	-2.1%	-2.1%
58 : Publishing	-2.5%	-2.5%	-2.5%	-2.5%	-2.5%
59 : Film, video and TV production & music publishing	1.5%	1.5%	1.5%	1.5%	1.5%
61 : Telecommunications	1.5%	1.5%	1.5%	1.5%	1.5%
62 : Computer & related activities	2.2%	2.2%	2.2%	2.2%	2.2%
63 : Information service activities	2.2%	2.2%	2.2%	2.2%	2.2%
64 : Financial services	-0.5%	-0.5%	-0.5%	-0.5%	-0.5%
65 : Insurance & pension funding	-3.5%	-3.5%	-3.5%	-3.5%	-3.5%
66 : Auxiliary financial services	-0.5%	-0.5%	-0.5%	-0.5%	-0.5%
68 : Real estate activities	1.4%	1.4%	1.4%	1.4%	1.4%
69 : Legal & accounting activities	1.4%	1.4%	1.4%	1.4%	1.4%
70 : Head office & management consultancy activities	1.4%	1.4%	1.4%	1.4%	1.4%
71 : Architecture & engineering	1.4%	1.4%	1.4%	1.4%	1.4%
72 : Scientific research & development	1.4%	1.4%	1.4%	1.4%	1.4%
73 : Advertising & market research	1.4%	1.4%	1.4%	1.4%	1.4%
74 : Other professional, scientific & technical activities	1.4%	1.4%	1.4%	1.4%	1.4%
75 : Veterinary activities	1.2%	1.2%	1.2%	1.2%	1.2%
77 : Rental & leasing activities	1.3%	1.3%	1.3%	1.3%	1.3%
78 : Employment activities	1.3%	1.3%	1.3%	1.3%	1.3%
79 : Travel agencies & tour operators	1.3%	1.3%	1.3%	1.3%	1.3%
80 : Security & investigation activities	1.3%	1.3%	1.3%	1.3%	1.3%
81 : Building & landscape services	1.3%	1.3%	1.3%	1.3%	1.3%
82 : Office administrative & other business support	1.3%	1.3%	1.3%	1.3%	1.3%
84 : Public administration & defence	0.0%	0.0%	0.0%	0.0%	0.0%
85 : Education	2.0%	2.0%	2.0%	2.0%	2.0%
86 : Human health activities	1.2%	1.2%	1.2%	1.2%	1.2%
87 : Residential care activities	1.2%	1.2%	1.2%	1.2%	1.2%
88 : Social work activities without accommodation	1.2%	1.2%	1.2%	1.2%	1.2%
90 : Creative, arts & entertainment activities	1.5%	1.5%	1.5%	1.5%	1.5%
91 : Libraries, archives, museums & other cultural activities	1.5%	1.5%	1.5%	1.5%	1.5%
92 : Gambling & betting activities	1.5%	1.5%	1.5%	1.5%	1.5%
93 : Sports activities & amusement & recreation activities	1.5%	1.5%	1.5%	1.5%	1.5%
94 : Activities of membership organisations	1.5%	1.5%	1.5%	1.5%	1.5%
95 : Repair of computers & personal/household goods	1.5%	1.5%	1.5%	1.5%	1.5%
96 : Other personal service activities	1.5%	1.5%	1.5%	1.5%	1.5%
Total	0.5%	0.6%	0.7%	0.7%	0.8%

4.2 Floorspace Requirements

PAST TRENDS SCENARIO (25 YEAR TREND)

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	49,907	50,794	51,726	52,709	53,747
A2	143,050	144,584	152,634	161,352	170,796	181,025
A3	72,060	70,534	63,377	56,946	51,168	45,976
B1a	215,404	217,353	227,732	239,023	251,194	264,288
B1b	11,550	11,717	12,585	13,517	14,518	15,594
B1c	10,918	11,057	11,778	12,547	13,366	14,240
B2	396,875	394,582	384,620	377,169	372,282	370,066
B8	495,765	500,129	522,989	547,667	574,297	603,020
C1	8,007	7,837	7,042	6,327	5,685	5,108
Total	1,403,363	1,407,701	1,433,550	1,466,275	1,506,015	1,553,065

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		100%	102%	104%	106%	108%
A2		101%	107%	113%	119%	127%
A3		98%	88%	79%	71%	64%
B1a		101%	106%	111%	117%	123%
B1b		101%	109%	117%	126%	135%
B1c		101%	108%	115%	122%	130%
B2		99%	97%	95%	94%	93%
B8		101%	105%	110%	116%	122%
C1		98%	88%	79%	71%	64%
Total		100%	102%	104%	107%	111%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		172	1,059	1,991	2,974	4,013
A2		1,534	9,584	18,302	27,746	37,975
A3		-1,526	-8,683	-15,113	-20,892	-26,084
B1a		1,949	12,328	23,618	35,789	48,884
B1b		166	1,034	1,967	2,968	4,044
B1c		139	860	1,628	2,448	3,322
B2		-2,293	-12,255	-19,706	-24,592	-26,809
B8		4,365	27,224	51,902	78,532	107,256
C1		-170	-965	-1,679	-2,321	-2,898
Total		4,337	30,187	62,911	102,652	149,701

5 Labour Supply Scenario

Converts 'labour force' projections in the revised SNPP Scenario into employment projections by applying the commuting ratio (job balance ratio). The projected growth rates have been applied to ABI data (2010 base).

This provides total employment projections, which are then disaggregated between sectors using the same 'sector shares' as the Baseline Scenario.

5.1 Employment Projections

Employment Projections - East Staffordshire
Labour Supply Scenario

	2010 Actual	2011	2016	2021	2026	2031
01 - Agriculture/hunting, etc.	41	31	30	28	26	24
02 - Forestry	2	2	1	1	1	1
08 - Mining & quarrying	59	55	51	47	44	40
10 - Manf. - food products	2,002	2,283	2,516	2,675	2,631	2,683
11 - Manf. - beverages	1,579	1,801	1,984	2,031	2,075	2,116
13 - Manf. - textiles	99	105	96	88	82	75
14 - Manf. - wearing apparel	41	44	40	37	34	31
15 - Manf. - leather & related products	13	14	13	12	11	10
16 - Manf. - wood & wood products	217	181	148	156	157	140
17 - Manf. - paper & paper products	47	39	32	34	34	30
18 - Printing & reproduction of recorded media	148	302	238	239	243	237
20 - Manf. - chemicals & chemical products	51	99	85	70	64	41
22 - Manf. - rubber & plastic products	180	211	189	164	147	132
23 - Manf. - other non-metallic mineral products	556	573	560	518	456	401
24 - Manf. - basic metals	53	38	30	25	20	16
25 - Manf. - fabricated metal products	750	743	803	773	723	673
26 - Manf. - computer, electronic & optical products	174	139	137	124	111	99
27 - Manf. - electrical equipment	28	22	20	17	15	12
28 - Manf. - other machinery & equipment	2,238	2,247	2,028	2,017	1,897	1,748
29 - Manf. - motor vehicles, trailers	420	412	409	362	346	322
30 - Manf. - other transport equipment	129	136	129	123	117	110
31 - Manf. - furniture	56	63	60	60	61	60
32 - Manf. - other manufacturing	25	28	27	27	27	27
33 - Repair & installation of machinery & equipment	428	430	388	386	363	334
35 - Electricity, gas, steam & air conditioning supply	57	56	56	54	52	50
36 - Water collection, treatment & supply	22	19	18	17	16	15
37 - Sewerage	58	60	61	62	62	61
38 - Waste collection, treatment & disposal	178	183	188	189	190	189
39 - Other waste management services	73	75	77	78	78	77
41 - Construction of buildings	417	359	379	386	377	370
42 - Civil engineering	225	194	204	208	203	200
43 - Specialised construction activities	1,965	1,690	1,786	1,817	1,777	1,743
45 - Wholesale, retail & repair of motor vehicles	1,553	1,705	1,740	1,727	1,690	1,653
46 - Wholesale trade	2,373	2,605	2,659	2,639	2,593	2,536
47 - Retail trade	5,388	5,556	5,241	5,100	4,889	4,776
49 - Land transport	1,128	1,350	1,500	1,580	1,671	1,752
52 - Warehousing & transportation support activities	1,413	1,691	1,880	1,980	2,093	2,195
53 - Postal & courier activities	874	919	868	781	707	636
55 - Accommodation	351	306	326	320	312	299
56 - Food & beverage services	2,884	2,515	2,676	2,630	2,561	2,460
58 - Publishing	65	132	105	105	107	104
59 - Film, video and TV production & music publishing	73	75	77	78	78	77
61 - Telecommunications	1,131	1,190	1,123	1,010	915	824
62 - Computer & related activities	1,022	510	565	629	693	770
63 - Information service activities	57	28	32	35	39	43
64 - Financial services	575	578	566	574	577	583
65 - Insurance & pension funding	9	8	8	9	9	11
66 - Auxiliary financial services	228	229	225	228	229	231
68 - Real estate activities	472	430	485	514	564	632
69 - Legal & accounting activities	477	435	490	519	570	638
70 - Head office & management consultancy activities	2,425	2,211	2,492	2,639	2,899	3,246
71 - Architecture & engineering	706	644	725	768	844	945
72 - Scientific research & development	64	58	66	70	77	86
73 - Advertising & market research	45	41	46	49	54	60
74 - Other professional, scientific & technical activities	85	77	87	93	102	114
75 - Veterinary activities	87	81	77	80	83	86
77 - Rental & leasing activities	349	419	455	493	550	571
78 - Employment activities	2,535	3,041	3,309	3,578	3,998	4,151
79 - Travel agencies & tour operators	97	116	127	137	153	159
80 - Security & investigation activities	224	269	292	316	353	387
81 - Building & landscape services	688	825	898	971	1,085	1,126
82 - Office administrative & other business support	495	584	646	699	781	810
84 - Public administration & defence	1,581	1,623	1,513	1,562	1,590	1,609
85 - Education	4,579	4,293	4,280	4,337	4,338	4,346
86 - Human health activities	5,876	5,482	5,222	5,428	5,593	5,791
87 - Residential care activities	1,191	1,111	1,058	1,100	1,134	1,174
88 - Social work activities without accommodation	950	886	844	878	904	936
90 - Creative, arts & entertainment activities	35	36	37	37	37	37
91 - Libraries, archives, museums & other cultural activities	66	68	70	70	70	70
92 - Gambling & betting activities	145	149	153	154	155	154
93 - Sports activities & amusement & recreation activities	952	961	1,003	1,012	1,015	1,008
94 - Activities of membership organisations	189	195	199	201	201	200
95 - Repair of computers & personal/household goods	7	7	7	7	7	7
96 - Other personal service activities	925	953	974	984	986	980
Total	56,700	57,057	57,925	58,862	59,728	60,310

Projected Growth Rates (% pa)

	2010- 2011	2011- 2016	2016- 2021	2021- 2026	2026- 2031
01 - Agriculture/hunting, etc.	-24.3%	-0.7%	-1.6%	-1.4%	-1.7%
02 - Forestry	-24.3%	-0.7%	-1.6%	-1.4%	-1.7%
08 - Mining & quarrying	-7.0%	-1.5%	-1.7%	-1.4%	-1.8%
10 - Manf. - food products	14.0%	2.0%	0.5%	0.4%	0.4%
11 - Manf. - beverages	14.0%	2.0%	0.5%	0.4%	0.4%
13 - Manf. - textiles	6.3%	-1.9%	-1.5%	-1.4%	-1.8%
14 - Manf. - wearing apparel	6.3%	-1.9%	-1.5%	-1.4%	-1.8%
15 - Manf. - leather & related products	6.3%	-1.9%	-1.5%	-1.4%	-1.8%
16 - Manf. - wood & wood products	-16.9%	-3.9%	1.1%	0.1%	-2.2%
17 - Manf. - paper & paper products	-16.9%	-3.9%	1.1%	0.1%	-2.2%
18 - Printing & reproduction of recorded media	103.8%	-4.6%	0.1%	0.4%	-0.6%
20 - Manf. - chemicals & chemical products	93.5%	-3.0%	-3.7%	-5.1%	-5.2%
22 - Manf. - rubber & plastic products	17.0%	-2.1%	-2.9%	-2.1%	-2.2%
23 - Manf. - other non-metallic mineral products	3.0%	-0.5%	-1.5%	-2.5%	-2.6%
24 - Manf. - basic metals	-29.2%	-4.5%	-3.7%	-4.4%	-4.0%
25 - Manf. - fabricated metal products	-0.9%	1.6%	-0.8%	-1.3%	-1.4%
26 - Manf. - computer, electronic & optical products	-19.9%	-0.4%	-1.9%	-2.1%	-2.3%
27 - Manf. - electrical equipment	-21.1%	-1.7%	-3.7%	-2.9%	-3.8%
28 - Manf. - other machinery & equipment	0.4%	-2.0%	-0.1%	-1.2%	-1.6%
29 - Manf. - motor vehicles, trailers	-2.0%	-0.1%	-1.4%	-1.8%	-1.6%
30 - Manf. - other transport equipment	5.5%	-1.1%	-1.0%	-0.9%	-1.2%
31 - Manf. - furniture	12.8%	-1.1%	-0.1%	0.5%	-0.2%
32 - Manf. - other manufacturing	12.8%	-1.1%	-0.1%	0.5%	-0.2%
33 - Repair & installation of machinery & equipment	0.4%	-2.0%	-0.1%	-1.2%	-1.6%
35 - Electricity, gas, steam & air conditioning supply	-0.9%	-0.1%	-0.7%	-0.9%	-0.8%
36 - Water collection, treatment & supply	-12.3%	-1.9%	-0.7%	-0.9%	-1.8%
37 - Sewerage	3.0%	0.4%	0.2%	0.0%	-0.1%
38 - Waste collection, treatment & disposal	3.0%	0.4%	0.2%	0.0%	-0.1%
39 - Other waste management services	3.0%	0.4%	0.2%	0.0%	-0.1%
41 - Construction of buildings	-14.0%	1.1%	0.3%	-0.4%	-0.4%
42 - Civil engineering	-14.0%	1.1%	0.3%	-0.4%	-0.4%
43 - Specialised construction activities	-14.0%	1.1%	0.3%	-0.4%	-0.4%
45 - Wholesale, retail & repair of motor vehicles	9.8%	0.4%	-0.1%	-0.4%	-0.4%
46 - Wholesale trade	9.8%	0.4%	-0.1%	-0.4%	-0.4%
47 - Retail trade	3.1%	-1.2%	-0.5%	-0.8%	-0.5%
49 - Land transport	19.7%	2.1%	1.0%	1.1%	1.0%
52 - Warehousing & transportation support activities	19.7%	2.1%	1.0%	1.1%	1.0%
53 - Postal & courier activities	5.2%	-1.2%	-2.1%	-2.0%	-2.1%
55 - Accommodation	-12.8%	1.3%	-0.3%	-0.5%	-0.8%
56 - Food & beverage services	-12.8%	1.3%	-0.3%	-0.5%	-0.8%
58 - Publishing	103.8%	-4.6%	0.1%	0.4%	-0.6%
59 - Film, video and TV production & music publishing	3.0%	0.4%	0.2%	0.0%	-0.1%
61 - Telecommunications	5.2%	-1.2%	-2.1%	-2.0%	-2.1%
62 - Computer & related activities	-50.1%	2.1%	2.2%	1.9%	2.1%
63 - Information service activities	-50.1%	2.1%	2.2%	1.9%	2.1%
64 - Financial services	0.6%	-0.4%	0.3%	0.1%	0.2%
65 - Insurance & pension funding	-13.3%	-0.1%	2.0%	1.5%	3.3%
66 - Auxiliary financial services	0.6%	-0.4%	0.3%	0.1%	0.2%
68 - Real estate activities	-8.8%	2.4%	1.2%	1.9%	2.3%
69 - Legal & accounting activities	-8.8%	2.4%	1.2%	1.9%	2.3%
70 - Head office & management consultancy activities	-8.8%	2.4%	1.2%	1.9%	2.3%
71 - Architecture & engineering	-8.8%	2.4%	1.2%	1.9%	2.3%
72 - Scientific research & development	-8.8%	2.4%	1.2%	1.9%	2.3%
73 - Advertising & market research	-8.8%	2.4%	1.2%	1.9%	2.3%
74 - Other professional, scientific & technical activities	-8.8%	2.4%	1.2%	1.9%	2.3%
75 - Veterinary activities	-6.7%	-1.0%	0.8%	0.6%	0.7%
77 - Rental & leasing activities	20.0%	1.7%	1.6%	2.2%	0.8%
78 - Employment activities	20.0%	1.7%	1.6%	2.2%	0.8%
79 - Travel agencies & tour operators	20.0%	1.7%	1.6%	2.2%	0.8%
80 - Security & investigation activities	20.0%	1.7%	1.6%	2.2%	0.8%
81 - Building & landscape services	20.0%	1.7%	1.6%	2.2%	0.8%
82 - Office administrative & other business support	20.0%	1.7%	1.6%	2.2%	0.8%
84 - Public administration & defence	2.7%	-1.4%	0.6%	0.4%	0.2%
85 - Education	-6.2%	-0.1%	0.3%	0.0%	0.0%
86 - Human health activities	-6.7%	-1.0%	0.8%	0.6%	0.7%
87 - Residential care activities	-6.7%	-1.0%	0.8%	0.6%	0.7%
88 - Social work activities without accommodation	-6.7%	-1.0%	0.8%	0.6%	0.7%
90 - Creative, arts & entertainment activities	3.0%	0.4%	0.2%	0.0%	-0.1%
91 - Libraries, archives, museums & other cultural activities	3.0%	0.4%	0.2%	0.0%	-0.1%
92 - Gambling & betting activities	3.0%	0.4%	0.2%	0.0%	-0.1%
93 - Sports activities & amusement & recreation activities	3.0%	0.4%	0.2%	0.0%	-0.1%
94 - Activities of membership organisations	3.0%	0.4%	0.2%	0.0%	-0.1%
95 - Repair of computers & personal/household goods	3.0%	0.4%	0.2%	0.0%	-0.1%
96 - Other personal service activities	3.0%	0.4%	0.2%	0.0%	-0.1%
Total	0.6%	0.3%	0.3%	0.3%	0.2%

5.2 Floorspace Requirements

LABOUR SUPPLY SCENARIO

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	49,788	47,190	46,140	44,483	43,712
A2	143,050	137,610	140,679	142,948	145,768	150,232
A3	72,060	62,829	66,863	65,704	63,999	61,465
B1a	215,404	218,653	225,793	236,454	251,055	261,319
B1b	11,550	10,530	11,868	12,571	13,807	15,461
B1c	10,918	8,727	8,475	7,610	6,796	5,988
B2	396,875	429,670	431,802	429,180	419,147	406,747
B8	495,765	556,511	577,240	575,333	574,777	573,086
C1	8,007	6,981	7,429	7,300	7,111	6,829
Total	1,403,363	1,481,299	1,517,339	1,523,240	1,526,943	1,524,837

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		100%	95%	93%	89%	88%
A2		96%	98%	100%	102%	105%
A3		87%	93%	91%	89%	85%
B1a		102%	105%	110%	117%	121%
B1b		91%	103%	109%	120%	134%
B1c		80%	78%	70%	62%	55%
B2		108%	109%	108%	106%	102%
B8		112%	116%	116%	116%	116%
C1		87%	93%	91%	89%	85%
Total		106%	108%	109%	109%	109%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		54	-2,545	-3,595	-5,252	-6,023
A2		-5,440	-2,371	-102	2,718	7,182
A3		-9,231	-5,197	-6,356	-8,061	-10,595
B1a		3,249	10,389	21,050	35,650	45,915
B1b		-1,020	317	1,020	2,256	3,910
B1c		-2,191	-2,443	-3,309	-4,122	-4,930
B2		32,795	34,927	32,305	22,272	9,872
B8		60,747	81,476	79,568	79,013	77,321
C1		-1,026	-577	-706	-896	-1,177
Total		77,936	113,976	119,876	123,580	121,474

6 Policy-On Scenario

Based on housing growth of 470 houses per annum (2012 Housing Requirements and SHMA Update), which has been converted into the associated increase in population, working age population, economically active and jobs (using commuting/job balance ratios) before being applied to ABI data (2010 base).

This provides total employment projections, which are then disaggregated between sectors using the LEFM projections, tailored to reflect the following local priorities and aspirations:

- Growth in manufacture of motor vehicles and transport equipment, engineering and R&D is projected to grow by more than projected by the LEFM forecasts (by applying past trends) based on the optimistic view of these sectors locally;
- Projected growth in distribution and logistics sectors has been restricted to half the LEFM growth rate to reflect local resistance to further growth in these sectors; and
- Employment in office sectors (financial and business services) has been restricted to the respective Experian growth rates to reflect local views of limited opportunities for growth in these sectors.

Employment growth in 'non-basic' sectors such as education, health, retail, etc. is estimated by applying 'dwellings-to-job' ratios to the housing requirements – i.e. for sectors where the size of the sector is likely to be closely related to the number of dwellings. All other sectors are assumed to grow in line with the LEFM projections.

6.1 Employment Projections

Employment Projections - East Staffordshire Policy-On Scenario

	2010 Actual	2011	2016	2021	2026	2031
01 : Agriculture/hunting, etc.	41	40	36	33	30	27
02 : Forestry	2	2	2	2	1	1
08 : Mining & quarrying	59	58	55	52	49	46
10 : Manf - food products	2,002	2,043	2,262	2,503	2,771	3,068
11 : Manf - beverages	1,579	1,611	1,784	1,975	2,186	2,419
13 : Manf - textiles	99	98	95	92	89	86
14 : Manf - wearing apparel	41	41	39	38	37	36
15 : Manf - leather & related products	13	13	12	12	12	11
16 : Manf - wood & wood products	217	214	199	185	172	160
17 : Manf - paper & paper products	47	46	43	40	37	35
18 : Printing & reproduction of recorded media	148	152	176	203	234	270
20 : Manf - chemicals & chemical products	51	51	50	49	48	47
22 : Manf - rubber & plastic products	180	178	171	164	157	150
23 : Manf - other non-metallic mineral products	556	551	526	502	480	458
24 : Manf - basic metals	53	50	39	30	24	18
25 : Manf - fabricated metal products	750	751	756	760	765	770
26 : Manf - computer, electronic & optical products	174	170	154	139	125	113
27 : Manf - electrical equipment	29	27	23	19	16	14
28 : Manf - other machinery & equipment	2,238	2,226	2,167	2,109	2,053	1,999
29 : Manf - motor vehicles, trailers	420	437	534	652	797	974
30 : Manf - other transport equipment	129	129	128	127	127	126
31 : Manf - furniture	56	57	59	63	66	69
32 : Manf - other manufacturing	25	25	27	28	29	31
33 : Repair & installation of machinery & equipment	428	426	414	403	393	382
35 : Electricity, gas, steam & air conditioning supply	57	57	57	57	57	57
36 : Water collection, treatment & supply	22	22	20	19	18	17
37 : Sewerage	58	59	61	64	67	70
38 : Waste collection, treatment & disposal	178	180	188	197	206	216
39 : Other waste management services	73	74	77	81	84	88
41 : Construction of buildings	417	420	436	453	470	488
42 : Civil engineering	225	227	235	244	253	263
43 : Specialised construction activities	1,965	1,980	2,055	2,133	2,214	2,298
45 : Wholesale, retail & repair of motor vehicles	1,553	1,561	1,603	1,646	1,690	1,736
46 : Wholesale trade	2,373	2,384	2,440	2,497	2,555	2,615
47 : Retail trade	5,388	5,433	5,662	5,901	6,150	6,410
49 : Land transport	1,128	1,144	1,225	1,312	1,405	1,504
52 : Warehousing & transportation support activities	1,413	1,432	1,534	1,643	1,759	1,884
53 : Postal & courier activities	874	870	851	833	814	797
55 : Accommodation	351	353	366	379	393	407
56 : Food & beverage services	2,884	2,904	3,008	3,116	3,227	3,342
58 : Publishing	65	67	77	89	103	119
59 : Film, video and TV production & music publishing	73	74	77	81	84	88
61 : Telecommunications	1,131	1,121	1,073	1,028	984	942
62 : Computer & related activities	1,022	1,031	1,079	1,130	1,182	1,238
63 : Information service activities	57	58	60	63	66	69
64 : Financial services	575	578	592	606	620	635
65 : Insurance & pension funding	9	9	9	9	9	9
66 : Auxiliary financial services	228	229	235	240	246	252
68 : Real estate activities	472	478	508	540	574	611
69 : Legal & accounting activities	477	483	515	549	585	624
70 : Head office & management consultancy activities	2,425	2,456	2,618	2,791	2,975	3,171
71 : Architecture & engineering	706	727	844	979	1,136	1,318
72 : Scientific research & development	64	66	76	89	103	119
73 : Advertising & market research	45	46	49	52	55	59
74 : Other professional, scientific & technical activities	85	86	92	98	104	111
75 : Veterinary activities	87	88	90	93	96	99
77 : Rental & leasing activities	349	351	361	372	383	394
78 : Employment activities	2,535	2,550	2,625	2,703	2,783	2,865
79 : Travel agencies & tour operators	97	98	100	103	106	110
80 : Security & investigation activities	224	225	232	239	246	253
81 : Building & landscape services	688	692	713	734	755	776
82 : Office administrative & other business support	495	498	513	528	543	560
84 : Public administration & defence	1,581	1,604	1,725	1,856	1,996	2,147
85 : Education	4,579	4,621	4,835	5,059	5,293	5,538
86 : Human health activities	5,876	5,912	6,093	6,281	6,474	6,673
87 : Residential care activities	1,191	1,198	1,235	1,273	1,312	1,352
88 : Social work activities without accommodation	950	956	985	1,015	1,047	1,079
89 : Creative, arts & entertainment activities	35	35	37	39	41	43
91 : Libraries, archives, museums & other cultural activities	65	67	70	74	78	82
92 : Gambling & betting activities	145	146	154	162	171	180
93 : Sports activities & amusement & recreation activities	952	962	1,012	1,065	1,121	1,180
94 : Activities of membership organisations	189	193	216	241	269	301
95 : Repair of computers & personal/household goods	7	7	7	7	8	8
96 : Other personal service activities	925	930	955	980	1,007	1,034
Total	56,700	57,138	59,434	61,921	64,617	67,540

Projected Growth Rates (% pa)

	2010-2011	2011-2016	2016-2021	2021-2026	2026-2031
01 : Agriculture/hunting, etc.	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
02 : Forestry	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
08 : Mining & quarrying	-1.2%	-1.2%	-1.2%	-1.2%	-1.2%
10 : Manf - food products	2.1%	2.1%	2.1%	2.1%	2.1%
11 : Manf - beverages	2.1%	2.1%	2.1%	2.1%	2.1%
13 : Manf - textiles	-0.7%	-0.7%	-0.7%	-0.7%	-0.7%
14 : Manf - wearing apparel	-0.7%	-0.7%	-0.7%	-0.7%	-0.7%
15 : Manf - leather & related products	-0.7%	-0.7%	-0.7%	-0.7%	-0.7%
16 : Manf - wood & wood products	-1.4%	-1.4%	-1.4%	-1.4%	-1.4%
17 : Manf - paper & paper products	-1.4%	-1.4%	-1.4%	-1.4%	-1.4%
18 : Printing & reproduction of recorded media	2.9%	2.9%	2.9%	2.9%	2.9%
20 : Manf - chemicals & chemical products	-0.4%	-0.4%	-0.4%	-0.4%	-0.4%
22 : Manf - rubber & plastic products	-0.9%	-0.9%	-0.9%	-0.9%	-0.9%
23 : Manf - other non-metallic mineral products	-0.9%	-0.9%	-0.9%	-0.9%	-0.9%
24 : Manf - basic metals	-4.9%	-4.9%	-4.9%	-4.9%	-4.9%
25 : Manf - fabricated metal products	0.1%	0.1%	0.1%	0.1%	0.1%
26 : Manf - computer, electronic & optical products	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
27 : Manf - electrical equipment	-3.4%	-3.4%	-3.4%	-3.4%	-3.4%
28 : Manf - other machinery & equipment	-0.5%	-0.5%	-0.5%	-0.5%	-0.5%
29 : Manf - motor vehicles, trailers	4.1%	4.1%	4.1%	4.1%	4.1%
30 : Manf - other transport equipment	-0.1%	-0.1%	-0.1%	-0.1%	-0.1%
31 : Manf - furniture	1.0%	1.0%	1.0%	1.0%	1.0%
32 : Manf - other manufacturing	1.0%	1.0%	1.0%	1.0%	1.0%
33 : Repair & installation of machinery & equipment	-0.5%	-0.5%	-0.5%	-0.5%	-0.5%
35 : Electricity, gas, steam & air conditioning supply	0.0%	0.0%	0.0%	0.0%	0.0%
36 : Water collection, treatment & supply	-1.3%	-1.3%	-1.3%	-1.3%	-1.3%
37 : Sewerage	0.9%	0.9%	0.9%	0.9%	0.9%
38 : Waste collection, treatment & disposal	0.9%	0.9%	0.9%	0.9%	0.9%
39 : Other waste management services	0.9%	0.9%	0.9%	0.9%	0.9%
41 : Construction of buildings	0.7%	0.7%	0.7%	0.7%	0.7%
42 : Civil engineering	0.7%	0.7%	0.7%	0.7%	0.7%
43 : Specialised construction activities	0.7%	0.7%	0.7%	0.7%	0.7%
45 : Wholesale, retail & repair of motor vehicles	0.5%	0.5%	0.5%	0.5%	0.5%
46 : Wholesale trade	0.5%	0.5%	0.5%	0.5%	0.5%
47 : Retail trade	0.8%	0.8%	0.8%	0.8%	0.8%
49 : Land transport	1.4%	1.4%	1.4%	1.4%	1.4%
52 : Warehousing & transportation support activities	1.4%	1.4%	1.4%	1.4%	1.4%
53 : Postal & courier activities	-0.4%	-0.4%	-0.4%	-0.4%	-0.4%
55 : Accommodation	0.7%	0.7%	0.7%	0.7%	0.7%
56 : Food & beverage services	0.7%	0.7%	0.7%	0.7%	0.7%
58 : Publishing	2.9%	2.9%	2.9%	2.9%	2.9%
59 : Film, video and TV production & music publishing	0.9%	0.9%	0.9%	0.9%	0.9%
61 : Telecommunications	-0.9%	-0.9%	-0.9%	-0.9%	-0.9%
62 : Computer & related activities	0.9%	0.9%	0.9%	0.9%	0.9%
63 : Information service activities	0.9%	0.9%	0.9%	0.9%	0.9%
64 : Financial services	0.5%	0.5%	0.5%	0.5%	0.5%
65 : Insurance & pension funding	0.1%	0.1%	0.1%	0.1%	0.1%
66 : Auxiliary financial services	0.5%	0.5%	0.5%	0.5%	0.5%
68 : Real estate activities	1.2%	1.2%	1.2%	1.2%	1.2%
69 : Legal & accounting activities	1.3%	1.3%	1.3%	1.3%	1.3%
70 : Head office & management consultancy activities	1.3%	1.3%	1.3%	1.3%	1.3%
71 : Architecture & engineering	3.0%	3.0%	3.0%	3.0%	3.0%
72 : Scientific research & development	3.0%	3.0%	3.0%	3.0%	3.0%
73 : Advertising & market research	1.3%	1.3%	1.3%	1.3%	1.3%
74 : Other professional, scientific & technical activities	1.3%	1.3%	1.3%	1.3%	1.3%
75 : Veterinary activities	0.6%	0.6%	0.6%	0.6%	0.6%
77 : Rental & leasing activities	0.6%	0.6%	0.6%	0.6%	0.6%
78 : Employment activities	0.6%	0.6%	0.6%	0.6%	0.6%
79 : Travel agencies & tour operators	0.6%	0.6%	0.6%	0.6%	0.6%
80 : Security & investigation activities	0.6%	0.6%	0.6%	0.6%	0.6%
81 : Building & landscape services	0.6%	0.6%	0.6%	0.6%	0.6%
82 : Office administrative & other business support	0.6%	0.6%	0.6%	0.6%	0.6%
84 : Public administration & defence	1.5%	1.5%	1.5%	1.5%	1.5%
85 : Education	0.9%	0.9%	0.9%	0.9%	0.9%
86 : Human health activities	0.6%	0.6%	0.6%	0.6%	0.6%
87 : Residential care activities	0.6%	0.6%	0.6%	0.6%	0.6%
88 : Social work activities without accommodation	0.6%	0.6%	0.6%	0.6%	0.6%
89 : Creative, arts & entertainment activities	1.0%	1.0%	1.0%	1.0%	1.0%
91 : Libraries, archives, museums & other cultural activities	1.0%	1.0%	1.0%	1.0%	1.0%
92 : Gambling & betting activities	1.0%	1.0%	1.0%	1.0%	1.0%
93 : Sports activities & amusement & recreation activities	1.0%	1.0%	1.0%	1.0%	1.0%
94 : Activities of membership organisations	2.2%	2.2%	2.2%	2.2%	2.2%
95 : Repair of computers & personal/household goods	0.5%	0.5%	0.5%	0.5%	0.5%
96 : Other personal service activities	0.5%	0.5%	0.5%	0.5%	0.5%
Total	0.8%	0.8%	0.8%	0.9%	0.9%

6.2 Floorspace Requirements

POLICY-ON SCENARIO

Floorspace requirements by land use class and year

	2010	2011	2016	2021	2026	2031
A1	49,735	50,150	52,280	54,501	56,816	59,230
A2	143,050	144,514	152,126	160,258	168,958	178,279
A3	72,060	72,568	75,162	77,849	80,632	83,515
B1a	215,404	217,440	228,004	239,248	251,234	264,029
B1b	11,550	11,734	12,707	13,775	14,952	16,249
B1c	10,918	10,676	9,546	8,541	7,645	6,846
B2	396,875	399,748	415,681	434,444	456,378	481,886
B8	495,765	498,189	511,020	525,081	540,433	557,148
C1	8,007	8,063	8,351	8,650	8,959	9,279
Total	1,403,363	1,413,082	1,464,878	1,522,347	1,586,007	1,656,461

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		101%	105%	110%	114%	119%
A2		101%	106%	112%	118%	125%
A3		101%	104%	108%	112%	116%
B1a		101%	106%	111%	117%	123%
B1b		102%	110%	119%	129%	141%
B1c		98%	87%	78%	70%	63%
B2		101%	105%	109%	115%	121%
B8		100%	103%	106%	109%	112%
C1		101%	104%	108%	112%	116%
Total		101%	104%	108%	113%	118%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2011	2016	2021	2026	2031
A1		416	2,546	4,766	7,082	9,495
A2		1,464	9,076	17,208	25,908	35,229
A3		508	3,102	5,789	8,572	11,455
B1a		2,036	12,599	23,844	35,829	48,624
B1b		184	1,156	2,225	3,401	4,699
B1c		-242	-1,372	-2,377	-3,273	-4,072
B2		2,873	18,806	37,569	59,503	85,011
B8		2,424	15,256	29,316	44,669	61,383
C1		56	345	643	952	1,273
Total		9,718	61,515	118,984	182,644	253,098

7 Scenario Comparison

7.1 Employment Projections

Employment Projections - East Staffordshire Scenario Comparison

	2019 Actual	2021 LEFM Baseline Scenario	2021 Experian Baseline Scenario	2021 Past Trends Scenario (15 Year Trend)	2031 Past Trends Scenario (25 Year Trend)	2021 Labour Supply Scenario	2031 Policy-On Scenario
01 - Agriculture/hunting, etc.	41	27	19	47	25	24	27
02 - Forestry	2	1	1	2	1	1	1
08 - Mining & quarrying	59	46	12	42	43	40	40
10 - Manuf - food products	2,002	3,076	1,818	1,370	1,425	2,683	3,068
11 - Manuf - beverages	1,579	2,426	1,276	1,080	1,124	2,116	2,419
13 - Manuf - textiles	99	86	8	69	66	75	86
14 - Manuf - wearing apparel	41	36	3	28	27	31	36
15 - Manuf - leather & related products	13	11	1	9	9	10	11
16 - Manuf - wood & wood products	217	161	33	150	224	140	160
17 - Manuf - paper & paper products	47	35	7	33	45	30	35
18 - Printing & reproduction of recorded media	148	271	121	91	96	237	270
20 - Manuf - chemicals & chemical products	51	47	11	22	43	41	47
22 - Manuf - rubber & plastic products	180	151	132	65	104	132	150
23 - Manuf - other non-metallic mineral products	556	459	408	854	330	401	458
24 - Manuf - basic metals	53	18	23	29	31	16	18
25 - Manuf - fabricated metal products	750	772	323	517	524	673	770
26 - Manuf - computer, electronic & optical products	174	113	96	143	229	99	113
27 - Manuf - electrical equipment	29	14	15	17	34	12	14
28 - Manuf - other machinery & equipment	2,238	2,005	1,283	1,688	2,588	1,748	1,999
29 - Manuf - motor vehicles, trailers	420	369	394	823	977	322	974
30 - Manuf - other transport equipment	129	126	121	397	126	110	126
31 - Manuf - furniture	56	69	39	52	92	60	69
32 - Manuf - other manufacturing	25	31	18	23	41	27	31
33 - Repair & installation of machinery & equipment	428	383	300	323	495	334	382
35 - Electricity, gas, steam & air conditioning supply	57	57	86	0	0	50	57
36 - Water collection, treatment & supply	22	17	33	9	13	15	17
37 - Sewerage	58	70	87	64	80	61	70
38 - Waste collection, treatment & disposal	178	216	267	197	245	189	216
39 - Other waste management services	73	89	110	81	100	77	88
41 - Construction of buildings	417	424	379	474	433	370	488
42 - Civil engineering	225	229	270	256	233	200	263
43 - Specialized construction activities	1,965	1,998	2,417	2,232	2,039	1,743	2,298
45 - Wholesale, retail & repair of motor vehicles	1,553	1,895	1,853	1,158	1,489	1,653	1,736
46 - Wholesale trade	2,371	2,856	2,832	1,769	2,275	2,526	2,615
47 - Retail trade	5,388	5,476	5,270	5,668	5,658	4,776	6,410
49 - Land transport	1,128	2,009	1,710	1,546	1,498	1,172	1,504
52 - Warehousing & transportation support activities	1,413	2,517	2,142	1,937	1,877	2,196	1,884
53 - Postal & courier activities	874	730	1,325	1,613	1,198	636	797
55 - Accommodation	351	343	324	441	224	299	407
56 - Food & beverage services	2,884	2,820	2,655	3,619	1,840	2,640	3,342
58 - Publishing	65	119	57	40	38	104	119
59 - Film, video and TV production & music publishing	73	89	63	81	100	77	88
61 - Telecommunications	1,131	944	1,081	2,087	1,550	824	942
62 - Computer & related activities	1,022	883	1,241	2,558	1,625	770	1,238
63 - Information service activities	57	49	69	143	91	43	69
64 - Financial services	575	668	637	601	513	583	635
65 - Insurance & pension funding	9	12	9	4	4	11	9
66 - Auxiliary financial services	220	265	253	238	203	231	252
68 - Real estate activities	472	724	571	884	637	632	611
69 - Legal & accounting activities	477	732	625	803	644	638	624
70 - Head office & management consultancy activities	2,425	3,722	3,180	4,539	3,274	3,246	3,171
71 - Architecture & engineering	706	1,083	926	1,322	963	946	1,318
72 - Scientific research & development	64	96	84	120	86	86	119
73 - Advertising & market research	45	69	59	84	61	60	59
74 - Other professional, scientific & technical activities	85	130	111	159	115	114	111
75 - Veterinary activities	87	98	109	120	111	86	99
77 - Rental & leasing activities	349	655	396	640	457	571	394
78 - Employment activities	2,535	4,759	2,873	4,649	3,316	4,151	2,865
79 - Travel agencies & tour operators	97	182	110	178	127	159	110
80 - Security & investigation activities	224	420	254	411	293	367	253
81 - Building & landscape services	688	1,292	780	1,262	900	1,126	778
82 - Office administrative & other business support	495	929	561	809	649	810	560
84 - Public administration & defence	1,581	1,845	1,824	2,075	1,589	1,609	2,147
85 - Education	4,578	4,903	5,320	6,099	6,072	4,346	5,530
86 - Human health activities	5,876	6,639	7,363	8,082	7,458	5,791	6,673
87 - Residential care activities	1,191	1,346	1,470	1,638	1,520	1,174	1,352
88 - Social work activities without accommodation	958	1,073	1,172	1,307	1,212	936	1,079
90 - Creative, arts & entertainment activities	35	43	36	39	48	37	43
91 - Libraries, archives, museums & other cultural activities	66	80	66	73	91	70	82
92 - Gambling & betting activities	145	176	145	160	200	154	160
93 - Sports activities & amusement & recreation activities	952	1,156	952	1,052	1,310	1,008	1,100
94 - Activities of membership organisations	185	230	243	209	260	200	301
95 - Repair of computers & personal/household goods	7	9	9	8	10	7	8
96 - Other personal service activities	925	1,123	1,191	1,022	1,273	980	1,034
Total	56,700	69,148	61,081	72,618	65,521	60,330	67,540

Projected Growth Rates (2010-2031, average % pa)

	LEFM Baseline Scenario	Experian Baseline Scenario	Past Trends Scenario (15 Year Trend)	Past Trends Scenario (25 Year Trend)	Past Trends Scenario (25 Year Trend)	Labour Supply Scenario
01 - Agriculture/hunting, etc.	-1.9%	-3.6%	-2.4%	-2.6%	-2.6%	-2.0%
02 - Forestry	-1.5%	-3.6%	0.6%	-2.4%	-2.6%	-2.0%
08 - Mining & quarrying	-1.2%	-7.4%	-1.6%	-1.5%	-1.8%	-1.2%
10 - Manuf - food products	2.1%	-1.0%	-1.8%	-1.6%	1.4%	2.1%
11 - Manuf - beverages	2.1%	-1.0%	-1.8%	-1.6%	1.4%	2.1%
13 - Manuf - textiles	-0.7%	-11.2%	-1.7%	-1.9%	-1.3%	-0.7%
14 - Manuf - wearing apparel	-0.7%	-11.2%	-1.7%	-1.9%	-1.3%	-0.7%
15 - Manuf - leather & related products	-0.7%	-11.2%	-1.7%	-1.9%	-1.3%	-0.7%
16 - Manuf - wood & wood products	-1.4%	-8.5%	-1.7%	0.2%	-2.1%	-1.4%
17 - Manuf - paper & paper products	-1.4%	-8.5%	-1.7%	0.2%	-2.1%	-1.4%
18 - Printing & reproduction of recorded media	2.9%	-1.0%	-1.3%	-2.5%	2.3%	2.9%
20 - Manuf - chemicals & chemical products	-0.4%	-6.9%	-3.8%	-0.8%	-1.0%	-0.4%
22 - Manuf - rubber & plastic products	-0.8%	-1.5%	-4.8%	-2.6%	-1.3%	-0.9%
23 - Manuf - other non-metallic mineral products	-0.9%	-1.5%	2.1%	-2.5%	-1.5%	-0.9%
24 - Manuf - basic metals	-4.9%	-8.9%	-2.9%	-2.4%	-5.5%	-4.9%
25 - Manuf - fabricated metal products	0.1%	-3.9%	-1.8%	-1.7%	-0.5%	0.1%
26 - Manuf - computer, electronic & optical products	-2.0%	-2.8%	-0.9%	1.3%	-2.7%	-2.0%
27 - Manuf - electrical equipment	-3.3%	-2.8%	-2.2%	0.9%	-4.0%	-3.4%
28 - Manuf - other machinery & equipment	-0.5%	-2.6%	-1.3%	0.7%	-1.2%	-0.5%
29 - Manuf - motor vehicles, trailers	-0.6%	-0.3%	3.5%	4.1%	-1.3%	4.1%
30 - Manuf - other transport equipment	-0.1%	-0.3%	5.5%	-0.1%	-0.7%	-0.1%
31 - Manuf - furniture	1.0%	-1.7%	-0.3%	2.4%	0.4%	1.0%
32 - Manuf - other manufacturing	1.0%	-1.7%	-0.3%	2.4%	0.4%	1.0%
33 - Repair & installation of machinery & equipment	-0.5%	-1.7%	-1.3%	0.7%	-1.2%	-0.5%
35 - Electricity, gas, steam & air conditioning supply	0.0%	1.9%	-25.0%	-25.1%	-0.6%	0.0%
36 - Water collection, treatment & supply	-1.2%	1.9%	-4.3%	-2.6%	-1.9%	-1.3%
37 - Sewerage	0.9%	1.9%	0.5%	1.5%	0.3%	0.9%
38 - Waste collection, treatment & disposal	0.9%	1.9%	0.5%	1.5%	0.3%	0.9%
39 - Other waste management services	0.1%	-0.5%	0.6%	0.2%	-0.6%	0.1%
41 - Construction of buildings	0.1%	0.9%	0.6%	0.2%	-0.6%	0.1%
42 - Civil engineering	0.1%	1.0%	0.6%	0.2%	-0.6%	0.1%
43 - Specialized construction activities	0.1%	1.0%	0.6%	0.2%	-0.6%	0.1%
45 - Wholesale, retail & repair of motor vehicles	1.0%	0.8%	-1.4%	-0.2%	0.3%	0.5%
46 - Wholesale trade	1.0%	0.8%	-1.4%	-0.2%	0.3%	0.5%
47 - Retail trade	0.1%	-0.1%	0.2%	0.2%	-0.6%	0.8%
49 - Land transport	2.8%	2.0%	1.5%	1.4%	2.1%	1.4%
52 - Warehousing & transportation support activities	2.8%	2.0%	1.5%	1.4%	2.1%	1.4%
53 - Postal & courier activities	-0.9%	2.0%	3.0%	1.5%	-1.5%	-0.4%
55 - Accommodation	-0.1%	-0.4%	1.1%	-2.3%	-0.8%	0.7%
56 - Food & beverage services	-0.1%	-0.4%	1.1%	-2.3%	-0.8%	0.7%
58 - Publishing	2.9%	-0.7%	-2.3%	-2.5%	2.3%	2.9%
59 - Film, video and TV production & music publishing	0.9%	-0.7%	0.5%	1.5%	0.3%	0.9%
61 - Telecommunications	-0.9%	-0.2%	3.0%	1.5%	-1.5%	-0.9%
62 - Computer & related activities	-0.9%	0.9%	4.5%	2.2%	-1.9%	0.9%
63 - Information service activities	-0.7%	0.9%	4.5%	2.2%	-1.9%	0.9%
64 - Financial services	0.7%	0.5%	0.2%	-0.5%	0.1%	0.5%
65 - Insurance & pension funding	1.5%	0.1%	-4.0%	-3.5%	0.9%	0.1%
66 - Auxiliary financial services	0.7%	0.5%	0.2%	-0.5%	0.1%	0.5%
68 - Real estate activities	2.1%	0.9%	3.0%	1.4%	1.4%	1.2%
69 - Legal & accounting activities	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
70 - Head office & management consultancy activities	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
71 - Architecture & engineering	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
72 - Scientific research & development	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
73 - Advertising & market research	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
74 - Other professional, scientific & technical activities	2.1%	1.3%	3.0%	1.4%	1.4%	1.3%
75 - Veterinary activities	0.6%	1.1%	1.5%	1.2%	-0.1%	0.6%
77 - Rental & leasing activities	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
78 - Employment activities	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
79 - Travel agencies & tour operators	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
80 - Security & investigation activities	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
81 - Building & landscape services	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
82 - Office administrative & other business support	3.0%	0.6%	2.9%	1.3%	2.4%	0.6%
84 - Public administration & defence	0.7%	-2.0%	1.3%	0.0%	0.1%	1.5%
85 - Education	0.4%	0.7%	1.4%	2.0%	-0.2%	0.9%
86 - Human health activities	0.6%	1.1%	1.5%	1.2%	-0.1%	0.6%
87 - Residential care activities	0.6%	1.0%	1.5%	1.2%	-0.1%	0.6%
88 - Social work activities without accommodation	0.6%	1.0%	1.5%	1.2%	-0.1%	0.6%
90 - Creative, arts & entertainment activities	0.9%	0.0%	0.5%	1.5%	0.3%	1.0%
91 - Libraries, archives, museums & other cultural activities	0.9%	0.0%	0.5%	1.5%	0.3%	1.0%
92 - Gambling & betting activities	0.9%	0.0%	0.5%	1.5%	0.3%	1.0%
93 - Sports activities & amusement & recreation activities	0.9%	0.0%	0.5%	1.5%	0.3%	1.0%
94 - Activities of membership organisations	0.9%	1.2%	0.5%	1.5%	0.3%	2.2%
95 - Repair of computers & personal/household goods	0.9%	1.2%	0.5%	1.5%	0.3%	0.5%
96 - Other personal service activities	0.9%	1.2%	0.5%	1.5%	0.3%	0.5%
Total	0.9%	0.4%	1.2%	0.7%	0.3%	0.8%

7.2 Floorspace Requirements

FLOORSPACE PROJECTIONS - SCENARIO COMPARISON

Floorspace requirements by land use class

	2010	2031 LEFM Baseline Scenario	2031 Experian Baseline Scenario	2031 Past Trends Scenario (15 Year Trend)	2031 Past Trends Scenario (25 Year Trend)	2031 Labour Supply Scenario	2031 Policy- On Scenario
A1	49,735	50,117	49,311	56,411	53,747	43,712	59,230
A2	143,050	172,246	162,395	195,532	181,025	150,232	178,279
A3	72,060	70,472	66,591	90,435	45,976	61,465	83,515
B1a	215,404	299,612	238,988	334,545	264,288	261,319	264,029
B1b	11,550	17,726	15,014	21,622	15,594	15,461	16,249
B1c	10,918	6,865	6,005	8,682	14,240	5,988	6,846
B2	396,875	466,351	299,351	329,750	370,066	406,747	481,886
B8	495,765	657,065	653,578	642,272	603,020	573,086	557,148
C1	8,007	7,830	7,399	10,048	5,108	6,829	9,279
Total	1,403,363	1,748,284	1,498,632	1,689,297	1,553,065	1,524,837	1,656,461

Floorspace requirements for different land-use categories: % change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2031 LEFM Baseline Scenario	2031 Experian Baseline Scenario	2031 Past Trends Scenario (15 Year Trend)	2031 Past Trends Scenario (25 Year Trend)	2031 Labour Supply Scenario	2031 Policy- On Scenario
A1		101%	99%	113%	108%	88%	119%
A2		120%	114%	137%	127%	105%	125%
A3		98%	92%	126%	64%	85%	116%
B1a		139%	111%	155%	123%	121%	123%
B1b		153%	130%	187%	135%	134%	141%
B1c		63%	55%	80%	130%	55%	63%
B2		118%	75%	83%	93%	102%	121%
B8		133%	132%	130%	122%	116%	112%
C1		98%	92%	126%	64%	85%	116%
Total		125%	107%	120%	111%	109%	118%

Floorspace requirements for different land-use categories: absolute change compared to 2010

NB shows the change for each year compared to the base year of 2010 (not compared to preceding year in table)

	2010	2031 LEFM Baseline Scenario	2031 Experian Baseline Scenario	2031 Past Trends Scenario (15 Year Trend)	2031 Past Trends Scenario (25 Year Trend)	2031 Labour Supply Scenario	2031 Policy- On Scenario
A1		382	-423	6,676	4,013	-6,023	9,495
A2		29,196	19,345	52,482	37,975	7,182	35,229
A3		-1,588	-5,469	18,376	-26,084	-10,595	11,455
B1a		84,208	23,583	119,140	48,884	45,915	48,624
B1b		6,176	3,464	10,071	4,044	3,910	4,699
B1c		-4,053	-4,913	-2,236	3,322	-4,930	-4,072
B2		69,476	-97,523	-67,125	-26,809	9,872	85,011
B8		161,300	157,813	146,507	107,256	77,321	61,383
C1		-176	-608	2,042	-2,898	-1,177	1,273
Total		344,921	95,269	285,934	149,701	121,474	253,098

Sector Group		Land Use Class (% of land required for employment)
M1	Food & Beverages	B2
M2	Wood & Paper Materials/Products	B2
M3	Chemical, Plastic & Non-Metallic Materials/Products	B2
M4	Metals & Metal Products	B2
M5	Electronics & Electrical Equipment	B1c
M6	Mechanical Engineering	B2
M7	Motor Vehicles & Other Transport	B2
M8	Manufacturing nes	B2
S1	Utilities	B1a (30%)
S2	Construction	B1a (33.3%)
S3	Wholesale Distribution	B8
S4	Wholesale, Retail and Repair of Motor Vehicles	B2
S5	Retailing	A1 (33.3%)
S5	Retailing	B1a (33.3%)
S5	Retailing	A2 (33.3%)
S6	Land Transport	B8 (45%)
S6	Land Transport	B8 (55%)
S7	Post & Telecommunications	B8
S8	Accommodation & Food Service	C1 (10%)
S8	Accommodation & Food Service	A3 (90%)
S9	Printing, Publishing & Media	B2 (75%)
S9	Printing, Publishing & Media	B1a (25%)
S10	Insurance, Banking & Finance	A2a (50%)
S10	Insurance, Banking & Finance	B1a (50%)
S11	Computer & Information Services	B1a (45%)
S11	Computer & Information Services	A2b (45%)
S11	Computer & Information Services	A1 (10%)
S12	Professional Services	B1a (60%)
S12	Professional Services	B1b (5%)
S12	Professional Services	A2a/b (35%)
S13	Building & Landscape Services	B1a (30%)
S14	Other Business Services	B1a
S15	Public Administration & Defence	B1a
S16	Education	B1a (10%)
S17	Health & Social Care	B1a (20%)
S18	Recreational, Cultural & Sporting Activities	A2c
S19	Other Services	A2c

Extant Planning Permissions / Sites Under Construction:

	Hectares	Floorspace Yield (Sq M)	Net / Gross (Sq M)	Employment Assumption (p sq m)	Gross Employment Yield	Leakage (25%)	Displacement (50%)	Net Employment
B1	22.04667	88186.67	74958.67	29.5	2541	1905.729	952.8644	953
B2	17.72667	70906.67	70906.67	36	1970	1477.222	738.6111	739
B8	26.97667	134883.3	134883.3	70	1927	1445.179	722.5893	723
B1a	0.011	44	37.4	12	3	2.3375	1.16875	1
Total	66.761				6441	4830	2415	2415

Extant Planning Permissions / Sites Under Construction including Committed Sites:

	Hectares	Floorspace Yield (Sq M)	Net / Gross (Sq M)	Employment Assumption (p sq m)	Gross Employment Yield	Leakage (25%)	Displacement (50%)	Net Employment
B1	31.35	125400	106590	29.5	3613	2709.915	1354.958	1355
B2	27.03	108120	108120	36	3003	2252.5	1126.25	1126
B8	36.28	181400	181400	70	2591	1943.571	971.7857	972
B1a	0.011	44	37.4	12	3	2.3375	1.16875	1
Total	94.671				9211	6908	3454	3454

Available Floorspace (Marketed as of Jan 2013):

	Hectares	Floorspace Yield (Sq M)	Net / Gross (Sq M)	Employment Assumption (p sq m)	Gross Employment Yield	Leakage (25%)	Displacement (50%)	Net Employment
B2	0	12660	12660	36	352	264	132	132
B8	0	152304	152304	70	2176	1632	816	816
B1a	0	7435	7435	12	620	465	232	232
Total	0				3147	2360	1180	1180

Identified Projects:

	Hectares	Floorspace Yield (Sq M)	Net / Gross (Sq M)	Employment Assumption (p sq m)	Gross Employment Yield	Leakage (25%)	Displacement (50%)	Net Employment
B2	0	0	0	36	0	0	0	0
B8	0	0	0	70	0	0	0	0
B1a	0	4400	3740	12	312	234	117	117
Total	0				312	234	117	117

APPENDIX 8: SITE LIST

Site Reference	Site Name
2	Stretton Business Park
3	Beaches Park, Derby Road
4	Pirelli - existing factory
5	Rumenco/Pentagon Derby Road
6	Ryknild Industrial Estate, Derby Road.
7	Plasplugs, Wetmore Lane
8	Wetmore Lane Units
9	Bridge Park, Derby Road
10	Lorlec
11	Former car showroom and land to rear, Horninglow Road/Arthur Street
12	Grief UK Limited, Victoria Crescent.
13	Steel Fabs Industrial Estate, Victoria Crescent.
14	Dallow Street, adjacent to site 15.
15	Dallow Bridge, APV, Dallow Street.
16	Stonell Direct, Victoria Crescent.
17	Blackmores Mill
18	Site between Derby Street and Victoria Street.
19	Builders yard on Derby Road.
20	Little Burton West.
21	Hartshorne, Volvo, Derby Street.
22	Land on Horninglow Street, adjacent to railway.
25	Former railway sidings rear of bonded warehouse.
26	Vacant land rear Derby Turn office building
27	Former garage and pet suppliers.
28	Open land on Derby Road.
29	Land fronting Maltings.
41	Northside Business Park
42	The Burton Business Park, Hawkins Lane.
43	Site adjacent to the river, Wetmore Road.
44	Coors - Middle Yard
45	Maltings, Wetmore Road.
46	Rear Anson Court.
47	Hodges, Horninglow Street.
48	Coors Brewery, Station Street
49	Doug Toulson
54	Briggs, Derby Road
55	Global Brands distribution centre
56	Midland Grain Warehouse

57	The Town Hall
58	The Curzon Street Business Centre.
59	Green Line Business Park, Wellington Street.
60	IMEX Business Park, Shobnal Road.
61	Brabazon Court, Shobnal Road
62	CHF Tankers, Shobnal Road.
63	Pectel Shobnal Road.
64	Marstons Brewery, Shobnal Road.
65	County Council recycling and coal depot, Shobnal Road Parkway.
66	Centrum West
69	Anson Developments, Avro Business Park including Cookes.
80	Centrum East
81	Branston Depot.
82	Land south of Branston
89	Leavsley Containers
91	Anglesey House and Industrial Estate, Anglesey Road.
93	Webb Ivory, Queen Street.
94	Midland Timber.
96	Broadway Works.
97	Queen Street Units
98	Thurco, Watson Street
102	Land opposite Barton Business Park
103	Site name not known
104	Hawley's, Ferroli Etc, Lichfield Road.
110	Fauld Industrial Estate/ Castle Point Park.
111	Anslow Park
120	Bramshall
121	JCB Waterloo Park
130	Marchington Industrial Estate.
131	Former Marchington Barracks
132	Distribution Depot, Stubby Lane.
133	Lancaster Park
134	Ash Acres Industrial Park near Draycott in the Clay.
135	Greaves Lane near Draycott in the Clay.
140	Alpha Polish and Anodising
151	Elms Farm, Bramshall
152	Spath.
170	Derby Road, Uttoxeter.
171	Land off Derby Road, A518, adjacent existing hotel.
172	Dove Way
173	Pennycroft Lane

174	Dovefields
175	Adjacent Tesco.
176	Brookside
177	Top Furniture Ltd
178	County Council Depot, Knotty Way.
179	JCB Heavy Products Ltd.
180	JCB Potter Street
181	Bridge Street Industrial Estate.
182	JCB Storage/Workshops/Lorry park between railway line and Trinity Street.
183	Land adjacent to Old Knotty Way.
185	Foxs Biscuits, Cheadle Road.
195	Mayfield Yarns
100A	Site name not known
100B	Site name not known
100E	Site name not known
100F	Site name not known
101A	Rylands Farm Industrial Estate and Gray Car Business Park.
101B	Land North of Graycar Business Park
130A	Development site
16a	Reynolds Chains
174A	Dovefields
3a	East Avenue
49a	Coors offices, Station street/Cross street
49b	Coors offices, High Street
49c	Mosley Street industrial estate/ Kerry Foods/ Burton Beer Mats.
49d	Park Street industrial estate.
49e	James Properties, Wood Street.
4b	Pirelli - Derby Road frontage
66A	Adjacent Kongsberg Auto.
66B	Kongsberg Auto
67A	Expansion land for Health Care at Home
67B	Expansion land for Holland and Barrett
67D	Mercia Business Park
7a	Wetmore Lane, CEMEX Plant
SAI 200	Site name not known
SAI 202	Site name not known
SAI 203	Refer to site reference 121 for detail.
SAI 204	Meadow Lane Farm.
SAI 205	Heath Road.