AECOM

SOUTH KESTEVEN EMPLOYMENT LAND STUDY

SOUTH KESTEVEN DISTRICT COUNCIL

FINAL REPORT

OCTOBER 2015

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Abbreviations

ABI	Annual Business Inquiry
AAP	Area Action Plan
CAGR	Compound Annual Growth Rate
DCLG	Department of Communities and Local Government
ELS	Employment Land Study
FEMA	Functional Economic Market Area
NPPF	National Planning Policy Framework
NPPG	National Planning Practice Guidance
ODPM	Office of Deputy Prime Minister
ONS	Office of National Statistics
SAP	Site Allocations Policy
SHLAA	Strategic Housing and Economic Land Availability Assessment
SHMA	Strategic Housing Market Assessment
SKDC	South Kesteven District Council
SME	Small and Medium Sized Enterprises
VOA	Valuation Office Agency

1 Introduction

1.1 Study Objectives

AECOM was commissioned by South Kesteven in early 2015 to undertake an employment land study (ELS) of the district. The ELS provides an assessment of supply and demand of employment land in the district to form an evidence base to support the review of policies and preparation of South Kesteven's new Local Plan. The ELS will be used by the District Council to inform its future approach to the provision, protection, release or enhancement of employment land and premises. The review updates and builds on the existing employment land evidence base and the 2010 Employment Land study.

This study was carried out in parallel with the Grantham Capacity and Limits to Growth Study. The aim of the capacity study is to determine at both a strategic and a local level the capacity for housing and employment growth at Grantham over the local plan period. The report presented a number of sites and areas which are suitable for either housing or employment growth. These sites have not been assessed as part of the survey of employment sites because of the timing of the studies; however, they are discussed in Chapter 5 of this report as sites with potential for future employment use.

1.2 Policy Context

The National Planning Policy Framework (NPPF)[1] outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies.

The need for Local Planning Authorities to produce an up to date ELS and the suggested format is outlined in National Planning Practice Guidance (NPPG) published on the 6th March 2014. The NPPG supersedes the former guidance - the 2004 ODPM Employment Land Review Guidance Note. One of the key changes outlined in the NPPG includes a requirement for a 'call for sites' to identify sites with the potential to address economic development in the District. A call for sites process was completed as part of the Strategic Housing Land Availability Assessment (SHLAA) in 2014 and consideration is given to either existing employment sites proposed by the site owner for change of use to non-employment uses or new sites with potential to meet economic development needs.

The NPPG also suggests that studies take account of wider employment uses such as utilities, land for transport and waste management. The Council have separately commissioned a Retail Study to be undertaken in parallel which will consider retail and leisure growth over the Local Plan period and, like the ELS, this will inform policy formation. The methodology applied in this review complies with the principles outlined in the NPPF and the NPPG.

1.3 Study Area

The process for selecting existing and potential employment sites to survey corresponds to the guidance in the NPPG. This includes all those clusters surveyed as part of the 2010 ELS and a number of clusters identified by the council and agreed with AECOM. In total 57 employment clusters were assessed as part of the study.

We explain the selection of these clusters further in **Chapter 5** and present the locations in **Figures 5.1 – 5.6.**

[1] NPPF, paragraphs 160 to 161

1.4 Report Structure

This report sets out our final findings and policy recommendations for employment land in South Kesteven, taking into account the future economic development of the area. The report is structured as follows:

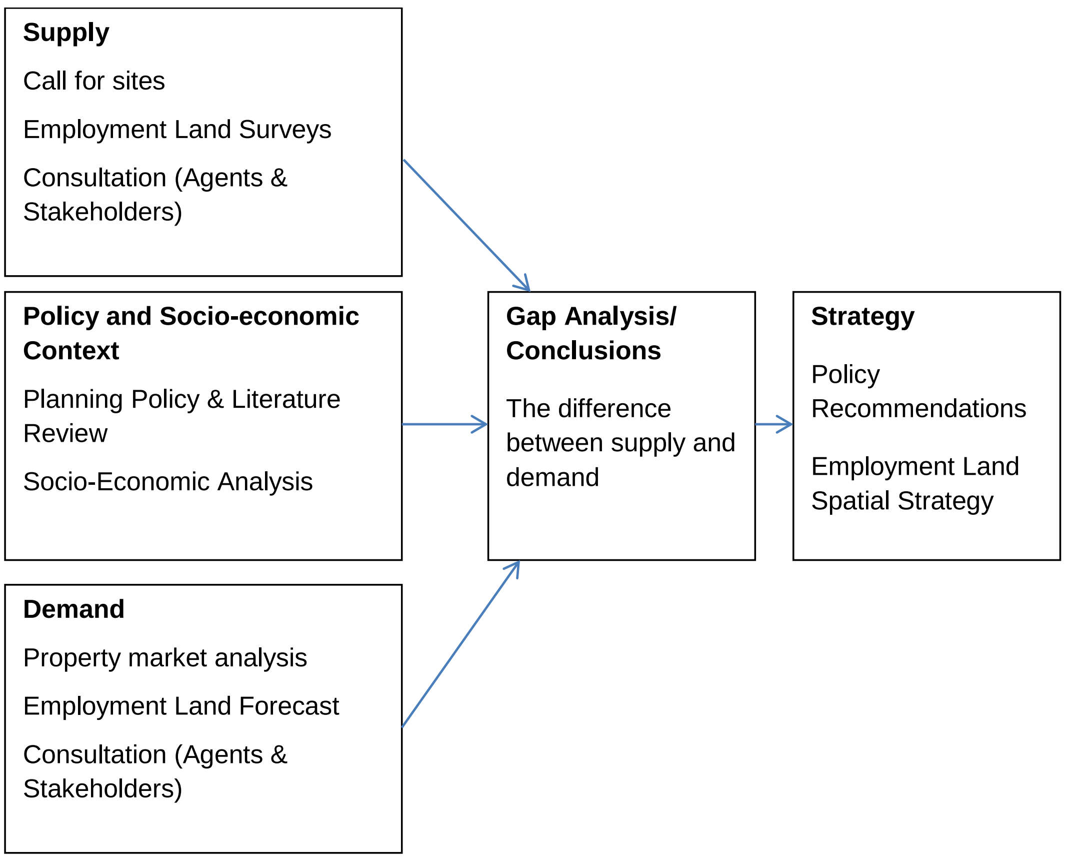
- **Section 2** details our approach
- **Section 3** sets out the national, regional and local policy context of particular relevance to employment land issues
- **Section 4** provides a high level analysis of socio-economic and local business baseline conditions in South Kesteven benchmarked against relative geographies
- **Section 5** summarises the key qualitative and quantitative results of the employment land cluster appraisals
- **Section 6** forecasts the demand for employment land
- **Section 7** sets out our overall conclusions; and presents our suggested recommendations for the future management of employment land in South Kesteven.

2 Approach

2.1 Introduction

This section sets out the main research elements of this employment land study as illustrated in **Figure 2-1**.The methodology has been developed to conform to the NPPG. Each element is reviewed briefly in the following sub-sections.

Figure 2-1 Approach to the Employment Land Study



Source: AECOM (2015)

2.2 Policy and Socio-economic Context

The Employment Land Study begins with a review of the policy framework and the socio-economic context.

The policy review takes account of relevant national, regional and local policies and strategies as these have the potential to influence future supply and demand for employment land. The socio-economic profile is benchmarked with the Functional Economic Market Area (FEMA) (see **Chapter 4**) in order to provide a picture of the district's economic make-up, and its comparative opportunities and constraints. The profile covers a review of historical employment information for the district, including information on workforce characteristics, occupation, earnings and travel to work information, and analysis on key sectors. To develop this profile a number of information sources are reviewed including Census data, ONS Annual Population Survey, Annual Business Inquiry and the Local Labour Force Survey.

2.3 Supply Assessment

A field survey of employment land in South Kesteven was carried out to assess its suitability for continued employment use. The list of clusters was drawn up and agreed in consultation with the Council. The list consist of:

- Clusters surveyed as per the 2010 Employment Land Capacity Study, which were drawn from the 2005 Employment Land Review
- Clusters identified in South Kesteven's Core Strategy and Site Allocation and Policies Development Plan Document (DPD) and sites in Grantham
- Clusters over 0.25 ha in size, as per NPPG paragraph 11, considered suitable for survey.

In total 57 employment clusters were identified and surveyed. An overview of all clusters is given in **Figure 2.2**

The survey covered the use classes B1, B2 and B8. Throughout this report employment land is referred to as land in office (B1), comprising B1a (Office) and B1b (Research and Development) but not B1c (Light Industry) as this use class shares characteristics more similar to industrial uses; industry (B2) comprising industry (B2) uses and B1c (Light Industry); and warehouse use (B8). Each cluster was surveyed and appraised against an agreed set of economic, planning and property market criteria, in line with National Planning Practice Guidance (2014).

To ensure consistency, surveyors used a survey manual, a structured survey questionnaire and a map of each employment cluster. The questionnaire included a series of close-ended and open-ended questions and captured quantitative and qualitative information. Once the surveys were complete (March 2015) the survey data was entered into a database and written up for analysis.

2.4 Property Market Assessment – Consultation

We consulted with local property market agents, key stakeholders involved in economic development and regeneration in order to better understand the local demand and supply characteristics of the employment land market and the land and premises-related drivers and constraints to businesses operating in the district.

Commercial Agent and Stakeholder Consultation

To help enhance the understanding of the supply and demand characteristics of the local employment land market, the views of local property market agents, key land owners and other key stakeholders were sought.

The exercise supplemented desk-based research and survey findings, and sought to test the emerging findings and conclusions relating to the demand and provision of office and industrial sites and premises in South Kesteven. Consultation with local property agents took the form of a semi-structured interview by telephone around topics including: South Kesteven employment Functional Economic Market Area; the demand and supply of sites and premises, the characteristics of sites and their suitability for employment uses; opportunities and constraints to growth; and inward investment and regeneration. The outputs of the consultation exercise are an important piece of evidence that provides real market intelligence from professionals working day to day with commercial property in South Kesteven and is a key consideration to inform the policy recommendations.

2.5 Demand Assessment

A number of different techniques can be used for forecasting future demand of employment land. Each has strengths and weaknesses. The decision was therefore taken after consultation with South Kesteven to adopt a synthesis approach that is based on the trends of the following factors:

- Sub-regional floorspace trends;
- Historic and forecast employment based on macro-economic forecasting; and
- Assessment of other local factors not contained within existing data such as transport improvements and the effects of the recession.

For the purpose of this study we have used data on office and industrial uses from the following local authority boundaries of a defined Functional Economic Market Area (FEMA), as suggested by property market agents. This corresponds with the housing market area as defined by the 2014 South Kesteven Strategic Housing Market Assessment (SHMA):

- South Kesteven;
- Rutland
- South Holland, and;
- Peterborough.

Valuations Office Agency (VOA) experimental commercial floorspace data released by the VOA in May 2012 and covering the period 2000 to 2012 was used to assess the changes in floorspace between 2000 and 2012 (the most up to date information) for the four Local Authorities within the FEMA. Historic trends were then used as the basis for a linear forecast of demand to 2036.

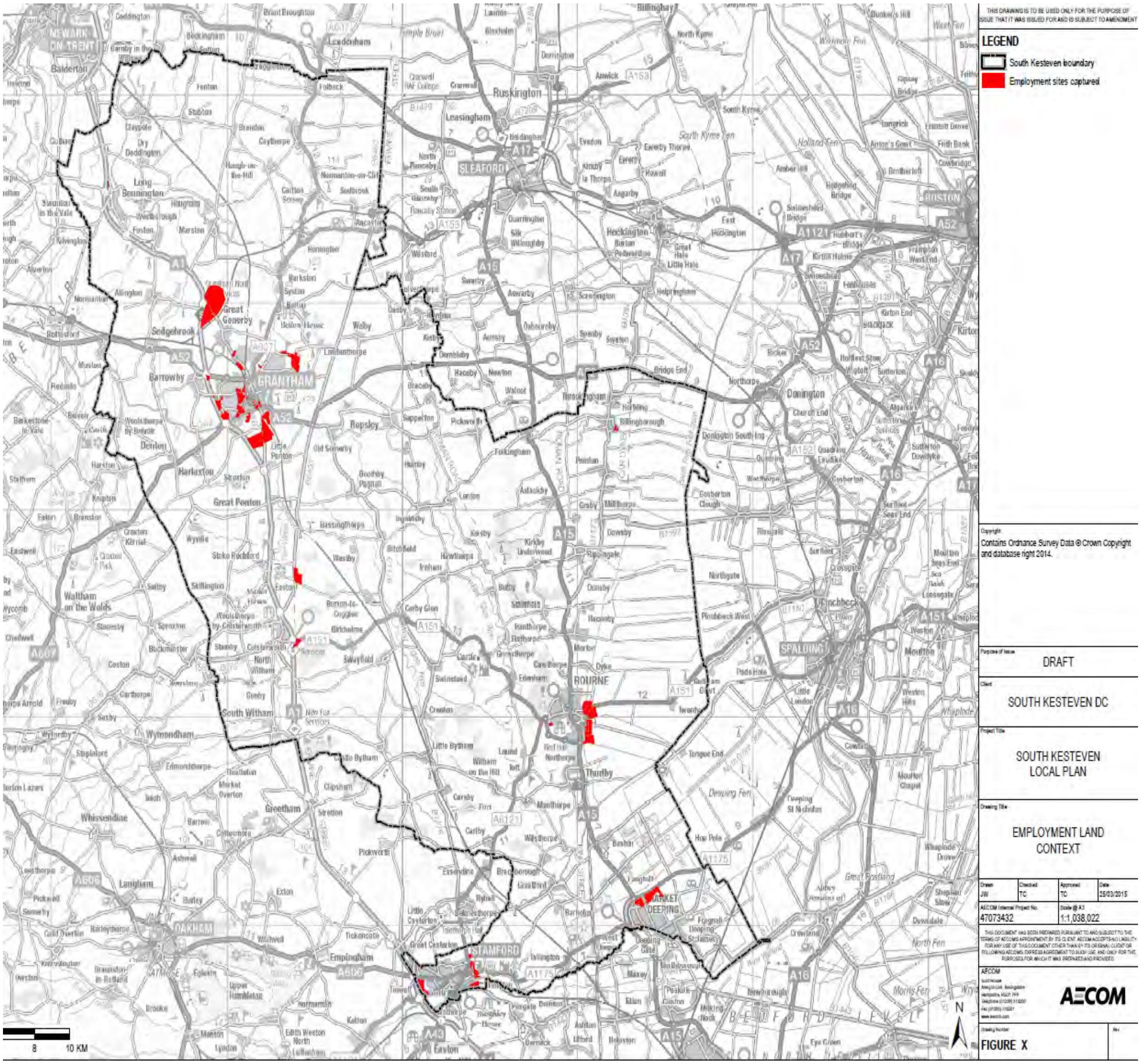
The linear floorspace forecast was then adjusted using information on employment forecasts (2012 – 2031) published by Experian (via the SHMA) and the Lincolnshire Local Enterprise Partnership (LEP) Strategic Economic Plan (2014). The final step, to further increase the robustness of the analysis, was to take account and adjust the employment land forecast using information on the economic, property market trends not included in the data and future policy direction in South Kesteven. This is made in relation to the wider economy and helps to present the potential future growth in a series of different potential scenarios.

2.6 Gap Analysis, Conclusions and Recommendations

The final chapter draws together all of the previous research elements and makes a comparison of the current supply of employment land in the District of South Kesteven with the projected demand for employment land up to 2036. This involves an assessment of the balance between supply and demand, and informs the position of whether there should be retention or release of employment land.

The recommendations are informed by all preceding analysis: the socio-economic profile of the district, field surveys, the economic development and planning policy context, property market analysis, demand projections and consultations findings. The recommendations describe by use class type and spatially where land for employment uses should be provided.

Figure 2.2 Context Map of Surveyed Employment Clusters in South Kesteven



Source: Aecom (2015)

3 Policy Review

3.1 Introduction

This section provides an overview of relevant planning and economic development policy which informs this employment land review.

3.2 National Planning Policy

National Planning Policy Framework (NPPF)

The NPPF condenses all planning policy statements into a single all-encompassing planning framework with the intention of making the planning system less complex and more accessible. The National Planning Policy Framework was published and came into effect on 27th March 2012.

The NPPF describes the Government's vision for building a strong, competitive economy. It sets out a presumption in favour of sustainable development in the absence of a local plan or where the plan is silent or indeterminate. This means that the ELR and Local Plan should present robust evidence to support clearly defined allocations of land for employment to avoid applications for alternative use being granted on the basis they are sustainable development. In relation to economic and employment land it states the following:

> *The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth.*
>
> *Therefore significant weight should be placed on the need to support economic growth through the planning system.*
>
> *To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century.*
>
> *Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing. In drawing up Local Plans, local planning authorities should:*
>
> - *Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;*
> - *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
> - *Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their 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;*
> - *Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;*

- *Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.*

Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities. (NPPF, page 6-7).

National Planning Practice Guidance NPPG (March 2014)

On the 6th March 2014 the Government published new National Planning Practice Guidance (NPPG) on ‘Housing and Economic Development Needs Assessments’ and ‘Housing and Economic Land Availability Assessments’ amongst others. This guidance replaces the ODPM Employment Land Reviews: Guidance Note (2004).

In economic development terms ‘need’ relates to the amount of economic development floorspace required based on quantitative assessment and an understanding of the qualitative requirements market segments. The NPPG requires need assessment to be based on an objective assessment of the facts and should not be biased or influenced by constraints to the overall assessment or limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints. Although it is recognised that such evidence will need to be addressed when identifying specific policies within development plans.

It is recognised that there is no one methodological approach for the assessment of need. However, the NPPG advises that in understanding the current market in relation to economic uses plan makers should liaise closely with the business community to understand their current and potential future requirements.

To provide an understanding of the underlying requirements for office, general business and warehousing sites the NPPG emphasises the importance of considering projections (based on past trends) and forecasts (based on future scenarios) and identify occurrences where sites have been developed for specialist economic uses. The NPPG requires plan makers to consider sectoral and employment forecasts and projections, demographically derived assessments of future employment needs, past take-up of employment land and property and/or future property market requirements, consultation and studies of business trends and statistics.

Analysing supply and demand concurrently enables conclusions to be drawn on whether there is a mismatch between quantitative and qualitative supply of and demand for employment sites. This in turn enables an understanding of which market segments are over-supplied to be derived and those which are undersupplied. By comparing availability of stock with particular requirements ‘gaps’ in local employment land provision can be identified.

The NPPG identifies that when translating employment and output forecasts into land requirements there are four key relationships that need to be quantified including:

- Standard Industrial Classification sectors to use classes;
- Standard Industrial Classification sectors to type of property;
- Employment to floorspace (employment density); and

- Floorspace to site area (plot ratio based on industry proxies).

The NPPG guidance on ‘Housing and Economic Land Availability Assessment’ sets out a general methodology for assessing land availability but focuses primarily on the assessment of housing rather than employment land.

With relevance to this study the NPPG requires local planning authorities to work with other local authorities within the functional economic market area when assessing availability of land in line with the duty to cooperate. The NPPG also requires plan makers to be proactive in identifying as wide a range of sites as possible, including existing sites that could be improved, intensified or changed. Sites which have particular policy constraints should be included in assessments however constraints should be set out clearly and tested with conclusions drawn on whether constraints can be overcome.

The assessment of the suitability of sites for development should be guided by the development plan, emerging plan policy and national policy, as well as market and industry requirements. The NPPG notes that when assessing sites against the adopted development plan, regard should be had to how up to date the plan policies are. Sites in existing development plans, or with planning permission, will generally be considered suitable for development although it may be necessary to assess whether circumstances have changed which would alter their suitability, in addition to the other factors identified in the NPPG.

New Permitted Development Rights

Supporting the Government’s effort to increase housing supply is an amendment to permitted development rights, which allows the change of use from B1(a) office to residential (C3) without the need for planning permission. These came into force in spring 2013 and have the purpose of supporting and enabling growth. The new permitted development rights will initially be time-limited for three years.

Local authorities were given an opportunity to seek an exemption from office to residential uses for specific geographies where there is evidence to suggest there could be a ‘loss of a nationally significant area of economic activity’ or ‘substantial adverse economic consequences at the local authority level which are not offset by the positive benefits the new rights would bring’. South Kesteven District Council was unsuccessful in its application for an exemption. It should be noted that this is a time limited policy and it will not apply from 2016 onwards.

3.3 Regional Policy

Joint Municipal Waste Management Strategy for Lincolnshire, 2008. The Lincolnshire Waste Partnership, June 2008.

The Joint Municipal Waste Disposal Strategy provides a method by which the eight local authorities in Lincolnshire and the Environmental agency can work in partnership to deliver sustainable waste management services in the district. It outlines the waste disposal strategy for the period of 2008-2020. The partnership is currently on track with its reduction in landfill use.

Lincolnshire Minerals and Waste Local Plan.

Lincolnshire County Council is preparing a Minerals and Waste Local Plan. The Core Strategy, which outlines the strategy and development management policies, has been submitted to the Secretary of State for examination by an independent Inspector. The Site Allocation document is expected to be published for consultation in the autumn of 2015.

Greater Lincolnshire Local Enterprise Strategy

The Great Lincolnshire LEP is a local enterprise strategy that brings together ten local district councils and private partners to provide growth across the area, especially where there is existing sectoral strength (agri-food, manufacturing, and visitor economy) as well as sectors with growth potential (low carbon, ports and logistics, and healthcare).

The Greater Lincolnshire LEP has secured £111.2m from the Government's Local Growth Fund to support economic growth in the area – with £18.6m of new funding confirmed for 2015/16 and £21.2m for 2016/17 to 2021. This funding will help to develop projects in the South Kesteven district including allocated funding for the Southern Relief Road in Grantham and provisional funding for the development of Grantham College – a new build to house the business, computing and technology curriculum and delivery of enterprise and employability skills. This funding will help foster and improve entrepreneurship in the district.

The strategy aims to provide funding that will be focused on two key areas to deliver transformative growth: Transport connectivity and flagship employment and housing sites; and Innovation and skills infrastructure. This is evidenced by the proposed funding for projects in South Kesteven.

3.4 Local Planning Policy

South Kesteven District Council is currently revising its Local Plan and commencing preparation of the new South Kesteven Local Plan 2016-2036. When adopted, the Local Plan will replace the Core Strategy (2006-2026), Site Allocations and Policies Development Plan Document (2014) and the Saved Policies in the South Kesteven Local Plan (1995). Neighbourhood Development Plans will also form part of the local Plan when adopted. These documents are included below for completeness, however, this study will provide evidence for the new South Kesteven Local Plan.

South Kesteven Core Strategy 2010

The Core Strategy was adopted on the 5th of July 2010. The purpose of the Core Strategy is to set out the Council's vision and objectives for the District up to 2026 and provides the framework for all the other documents that form South Kesteven's Local Development Framework (LDF). The following provides an overview of the relevant planning policies:

Forming an overarching principle, Policy E1 Employment Development, sets out the principles that cover development within the B Use Classes as well as public and community uses. Policy E1 sets out a strategy to focus on Economic Development in Grantham first and then the other three market towns (Bourne, Market Deeping, Stamford) and the A1 corridor:

'The Council's objective is to broaden and diversify the employment bases of the District by identifying development opportunities and sites for specific employment sectors within Grantham, Stamford, Bourne and the Deepings' by allocating sites through the Site Specific Allocations and Policies DPD and the Grantham AAP [GAAP]. The GAAP has not been progressed and, therefore, the policy framework for Grantham comprises the Core Strategy and the saved 1995 Local Plan policies.

The Core Strategy identified 90 hectares of B1, B2 and B8 floorspace in Grantham, 24 hectares in Stamford, focusing on modern office and commercial premises as well as high quality office space in the town centre, 50 hectares of a broad and flexible portfolio of sites for B2 and B8 uses in Bourne and 23 hectares of land in the Deepings. A total of 205 hectares of developable land was identified during this process, including sites in rural locations.

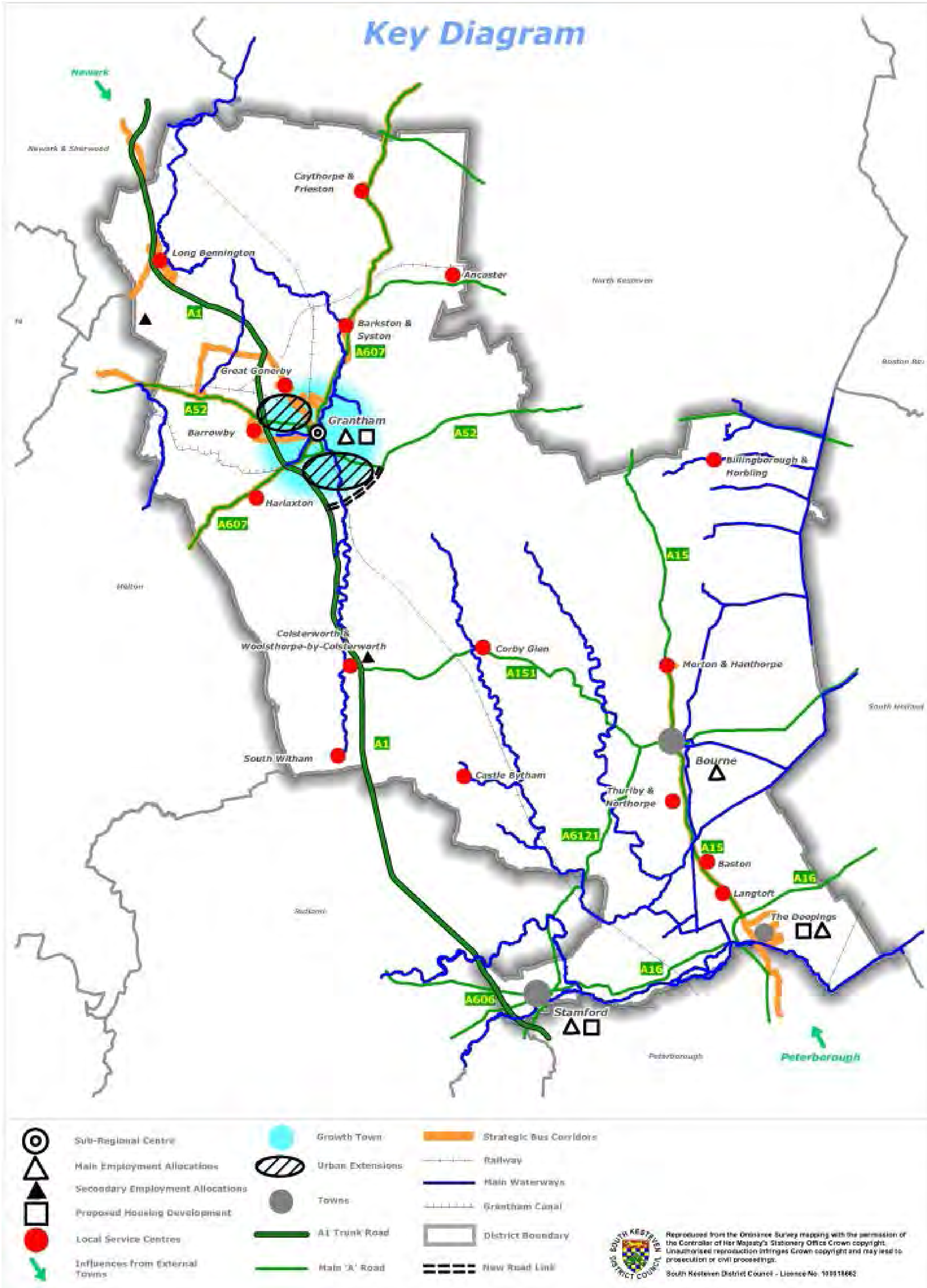
Core Strategy policy E1 is clear that existing employment areas of Grantham [and elsewhere] should be retained in employment use unless it can be demonstrated that;

- The site is vacant and no longer appropriate or viable as an employment allocation
- Redevelopment will deliver wider regeneration benefits
- An alternative use would not be detrimental to the overall supply and quality of employment land within the district
- An alternative use would resolve existing conflicts between land uses.

The implication of this for change of use from employment is that any sites that are in active employment use would have to be considered against the criteria in Core Strategy policy E1 before they were allowed to be put to other uses.

Figure 3.1 shows the adopted core strategy key diagram, with the triangle symbols showing the key employment allocations.

Figure 3-1 Adopted Core Strategy Key Diagram



South Kesteven Site Allocation and Policies Development Plan Document 2014

Adopted in April 2014, the Site Allocation and Policies document sets out the specific allocations for individual housing and employment sites across the District, to steer their future development up to 2026. The Site Allocation and Policies Development Plan Document must be in conformity with the adopted Core Strategy. It provides detailed policies to implement the core strategy objectives. The document has also helped to identify areas of viable existing employment land and restrict the loss of valuable commercial and industrial land to non-employment uses. Objectives of note in this DPD are included below;

Objectives 3: Identify a range of suitable and available sites to support a diversity of new and existing employers (including commercial, retail, leisure and other business sectors) to promote thriving local economy.

Objective 4: Restrict the loss of existing viable and well located employment land to other non-employment generating uses.

Objective 5: Identify opportunities to support and encourage appropriate rural employment and diversification schemes in sustainable and accessible locations throughout the District.

These objectives are supported by site specific policies that are used to support the Core Strategy Plan objectives. This includes designation of Locally Important Existing Employment Sites through Policy SAP5.

South Kesteven Strategic Housing Land Availability Assessment (2014)

South Kesteven District Council has published its 2014 SHLAA. This considered sites submitted to the Council as part of the Call for Sites which closed on 28 March 2014, together with other known sites which are, or have been, within the planning system.

The 2014 SHLAA contains the following information:

- a list of all sites or broad locations that have been considered, cross referenced to their locations on maps, indicating which sites have been excluded due to national policies, designations and other suitability criteria;
- an assessment of each site or broad location, in terms of its suitability for development, availability and achievability to determine whether a site is realistically expected to be developed and when;
- the potential type and quantity of development that could be delivered on each site/broad location, including a reasonable estimate of build-out rates, setting out how any barriers to delivery could be overcome and when;
- an indicative trajectory of anticipated development; and
- a summary for the whole of the District indicating the total numbers of dwellings considered to be deliverable and developable in 5-year periods.

The SHLAA identified sites with potential for housing, giving consideration to their housing potential and the timeframe for when they are likely to be developed. The study also considered theoretical constraints and probability of development on large identified sites. SHLAA studies are highlighted as a key evidence base through the NPPF.

Based on the findings of this analysis the study identified that sites in South Kesteven had capacity to provide 11,675 homes[2] over the period 2014-2029 and beyond.That methodology established a site threshold of 0.4 ha (or 10 dwellings) which was based on DCLG advice to the Planning Inspectorate (PINS)that sites should not be included unless they can “make a significant contribution to housing delivery” and research undertaken by ARUP which indicated that 0.4 hectares or 10 dwellings represented a suitable minimum site size for SHLAAs.

The SHLAA is updated annually and the 2015 Update will be published later this year.

Local Strategies

South Kesteven Strategic Housing Market Assessment (2014)

South Kesteven in partnership with Peterborough City Council, Rutland County Council and South Holland District Council has completed a comprehensive sub-regional Strategic Housing Market Assessment. The SHMA helps to set out important evidence regarding future housing needs for each of the district areas. Although the SHMA is not a policy document, it is important evidence and provides Objectively Assessed Needs [OAN] for the District [types of housing requirements, taking account of population structure, area profile and other applicable economic data]. The SHMA is currently being reviewed in the light of the latest household projections.

South Kesteven Review of Employment Land in Grantham (2013)

A report was conducted by Hodgson Elkington LLP between March-May 2013 to review the availability of employment land in Grantham. The report provided a qualitative analysis of employment land in Grantham and assessed the type, location and quality of existing employment land in Grantham. It also noted potential impacts on neighbouring areas and constraints for future development.

Stamford West Employment Land Assessment 2012

The Stamford West Employment Land Assessment refers to the development of employment land located on the western boundary of Stamford town. The site is bounded by residential on the north and east and the A1 on the western edge. The document discusses the potential of 11 ha of employment land being located on site including 10ha of high quality business park uses incorporating B1 and B2 employment.

3.5 Evidence Base Documents

The documents of relevance to this Employment Land Study that have been reviewed are listed below:

- South Kesteven SHMA 2014
- Site Allocation and Policies Development Plan Document 2014
- South Kesteven Employment Land Review 2010
- Greater Lincolnshire Local Enterprise Partnership/ Growth Deal
- Review of Employment Land in Grantham 2013
- Grantham Area Action Plan 2011-2026

[2] South Kesteven SHLAA Executive summary 2014 pg.iii.

- Stamford West Employment Land Assessment 2012

3.6 Summary

The National Planning Policy Framework(NPPF) replaced previous planning guidance as of March 2012, with the aim to make the planning system less complex and to promote sustainable growth. The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy.

At a regional level the Greater Lincolnshire LEP provides funding and guidance on the development of the region as a whole. Of particular relevance to South Kesteven is the funding support for the development of the Southern Relief Road and Grantham College.

At a local level, South Kesteven District Council is currently updating the adopted suite of development plan documents into a new South Kesteven Local Plan. This will help guide policies in relation to the future development of employment land within the district. The Core Strategy 2010 and the Site Allocation and Policies DPD 2014 include policies to protect against the loss of viable industrial land to other uses.

4 Socio-Economic Profile

4.1 Introduction

This section profiles South Kesteven using key socio-economic indicators. The analysis informs an understanding of the local economic strengths and weaknesses that may impact upon employment land demand. Key indicators profiled include:

- Population, including the working population, and skill and occupational profile of residents;
- Commuting patterns;
- The workplace economy, by business stock and size; and
- Workplace employment by industry sector.

To provide a comparative assessment South Kesteven is benchmarked against the East Midlands and a Great Britain wide average.

4.2 Population

Demand for housing, retail, community facilities and employment sites and premises will be driven in part by the resident population. Latest population estimates show that South Kesteven has grown from 134,100 at the 2011 Census to 136,400 in 2013 - a 1.72% increase over the two-year time period.

This is higher than the East Midlands average of 1.35% and the UK average of 1.31% and reflects a growing population.The implication is a likely growth in demand for land for housing, community facilities, infrastructure and employment land over the Local Plan period.

4.3 Workforce and employment

The latest statistics (September 2014) from the Office for National Statistics (ONS) suggest that South Kesteven has approximately 84,000 working age residents (men and women aged 16 to 64), of which approximately 80% are economically active. This proportion is slightly higher than the East Midlands average of 78.3%[3].

ONS record 67,200 (80.0%) working age residents being economically active with 65,200 (77.6%) people in employment. This proportion is slightly above both the economic activity rate and the employment rate for East Midlands which are 77.5% and 72.4% respectively.

The higher rate of economic activity in South Kesteven is reflected in the lower levels of unemployment, 3%, in comparison with the 6.6% average in the East Midlands. The area has proven quite resilient in the recession with small growth in employment levels of the 16-64 age groups in 2009 of 76.7% to 77.6% in September 2014.

4.4 Earnings

The Annual Survey of Hours and Earnings (ASHE) (2014) record the average gross weekly earnings of South Kesteven residents as £490; £7 higher than the average for the East Midlands and £30 lower than the average earnings in Great Britain.

[3] ONS Annual Population Survey, Economic Activity Rate aged 16-64, Feb 2015

ASHE records an average gross weekly earnings of those people working within South Kesteven of £425.20, which implies an earnings differential in favour of jobs outside South Kesteven, which could be a driver for out-commuting from the district.

Resident based earnings are higher than workplace earnings, indicating that a significant proportion of skilled resident workers use the excellent transport links to travel out of Grantham to better paid jobs elsewhere. However, Grantham's growth agenda will promote investment in housing, employment, retail, tourism and green infrastructure development, which will in turn provide a positive environment to retain a highly skilled labour force.

Table 4-1 Resident and Workplace Earnings 2014

Earnings	South Kesteven (£)	East Midlands (£)	Great Britain (£)
Resident-based	490.3	483.0	520.8
Workplace-based	425.2	474.1	520.2

Source: ONS Annual Survey of Hours and Earnings – Resident and Workplace Analysis (2014)

4.5 Skills and Training

South Kesteven residents generally maintain slightly lower levels of highly skilled qualifications in comparison to the East Midlands and Great Britain. Though the majority of working age residents (76.4%) obtained their GCSEs[4] only 27.9% are educated to a degree level and above – significantly lower than the proportion for the East Midlands and Great Britain as a whole. The proportion of residents with no qualifications is slightly lower in South Kesteven (7.7%) than in the East Midlands (10.3%) and the Great Britain* rate (9.3%). Nationally, however, there is a higher rate of residents educated to degree level and above (35%). The relatively low education profile in South Kesteven could contribute to a lower value-added economy and comparatively low workplace earnings within the district.

Table 4-2 Skills and Training 2013

Qualification Level[5]	South Kesteven (%)	East Midlands (%)	Great Britain (%)
NVQ4 +	27.9	30.1	35.2
NVQ3 +	53.8	52.4	55.8
NVQ2 +	76.4	69.7	72.5
NVQ1 +	88.5	83.1	84.4
Other Qualifications	3.8	6.6	6.3
No Qualifications	7.7	10.3	9.3

Source: ONS Annual Population Survey (Jan 2013 - Dec 2013)

4.6 Occupational Classifications

The table below sets out the occupation of South Kesteven residents compared with East Midlands averages. The following points are observed:

[4] Percentage of pupils achieving 5 or more A*-C grade passes at GCSE or equivalent.

[5] NVQ 4 - HND, Degree and Higher Degree; NVQ 3 equivalent - 2 or more A levels, advanced GNVQ, NVQ 3, 2; NVQ 2 equivalent - 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2; NVQ 1 equivalent - fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1; No qualifications - no formal qualifications held.

- SOC 2010 major group 1-3, includes the highest skills base and is well represented in South Kesteven with 40.65% of the population working in professional and management level positions. This performance is slightly better than the 40.26% average in the East Midlands. There is a larger proportion of managers, directors and senior officials represented amongst South Kesteven population, relative to the East Midlands.
- SOC2010 major group 4-5: The proportion of South Kesteven residents in employment who hold these levels of occupations is again in line with the East Midlands average. The administrative and secretarial occupations are slightly higher, with 10.76% of the working population compared with 10.27% across London.
- SOC 2010 major group 6-7 and 8-9: These SOC groups consist of 42.13% of all employment within South Kesteven this above the East Midlands average of 38.54%. There are a lower proportion of employees (6.58%) involved in sales and customer services occupations in comparison to the East Midlands average of 7.98%. There is a significantly higher proportion (13.6%) of the workforce involved in elementary occupations in South Kesteven in comparison to the East Midlands average of 9.4%.

Table 4-3 Employment by Occupation

	South Kesteven		East Midlands	
SOC 2010 Occupation	**Actual**	**%**	**Actual**	**%**
1 Managers, directors and senior officials	9,100	13.60%	200,200	9.40%
2 Professional occupations	9,200	13.75%	380,200	17.85%
3 Associate professional & technical	8,900	13.30%	277,100	13.01%
4 Administrative & secretarial	7,200	10.76%	218,800	10.27%
5 Skilled trades occupations	6,900	10.31%	234,400	11.01%
6 Caring, leisure & other service occupations	6,100	9.12%	184,000	8.64%
7 Sales and customer service occupations	4,400	6.58%	169,900	7.98%
8 Process plant & machine operatives	8,700	13.00%	266,600	12.52%
9 Elementary occupations	9,100	13.60%	200,200	9.40%
Total	60,600	-	1,931,200	-

Source: ONS annual population survey (Jan 2013 - Dec 2013)
Note 1: SOC = Standard Classification of Occupation, 2010

% does not total at 100% due to the residual unemployment level

4.7 Travel to Work

The most recent data on travel to work patterns is provided through origin-destination statistics collated from the Census in 2011. While the total figures for employment may be more than four years old, the figures give a useful indication of the pattern of movement of residents and workers into and out of South Kesteven.

The most popular destination for out commuting of the labour force is Peterborough (See Figure 3) which is in close proximity to Market Deeping, Bourne and Stamford. There is a net outflow of 5,109 people to Peterborough with approximately 7,791 employees commuting to Peterborough and an inflow of 2,682.

Comparatively there is a strong out-commuting flow: of the residents in employment, 23,518 leave the district to work outside, however only 14,205 people commute to South Kesteven to work.

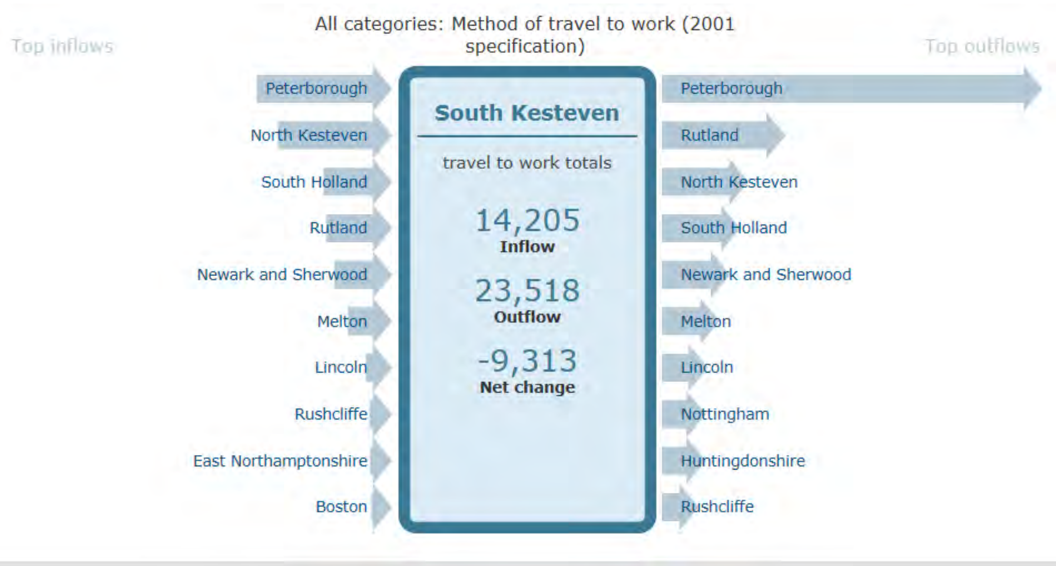


Figure 4-1 *Source; http://www.nomisweb.co.uk*

The ONS origin-destination commuting data therefore suggests a strong relationship between South Kesteven and its surrounding districts particularly Peterborough and Rutland. The job density[6] for South Kesteven is estimated at 0.76 compared with 0.72for the East Midlands. This indicates that South Kesteven is an attractive location to live however the higher paying jobs may be located outside the district.

[6] Job density is measured using Nomis Population figures= Total Jobs : Population aged 16-64

4.8 Business

Stock and Scale

The latest known business registrations data is from ONS which records 4,610 VAT or PAYE-based enterprises in South Kesteven in 2014[7]. Small and micro businesses contribute significantly to employment within South Kesteven, with 5,095 of the 5,190 companies (98.16%) employing up to nine employees (typically termed micro businesses)[8], in line with the East Midlands average[9].

Table 4-4 VAT and PAYE by Size Band

	South Kesteven		East Midlands	
Employment Size	**Number of Businesses**	**% of total**	**Number of Businesses**	**% of total**
1 to 9 (Micro)	4,610	88.82%	133,055	87.67%
10 to 49 (Small)	485	9.34%	15,445	10.18%
50 to 249 (Medium)	80	1.54%	2,665	1.76%
250 + (Large)	15	0.29%	605	0.40%
Total	5190	-	151,770	-

Source: UK Business Enterprise Counts; ONS 2014

By size of business, micro businesses also provide the majority of employment opportunities: micro businesses provide 88.82% of the district's total employment compared with large companies (employment over 250) which number only 15 and represent 0.29% of all employment opportunities in South Kesteven[10].

4.9 Business Registrations and De-registrations

VAT registration - de-registrations rates for South Kesteven provide an indication of the entrepreneurial characteristics of the district. On balance over the course of a year the net gain in registrations in South Kesteven is lower than East Midlands, with 625 (20.2%) birth rate of new companies compared to 22,035 (32.54%). Published data indicates that in 2013 there were 625 registrations and 485 de-registrations resulting in a net gain in South Kesteven's business stock of 140, or 2.7%[11]. In the East Midlands there were 22,035 new company births and 15,045 de-registrations indicating a net gain of 6990, or 4.6%.

[7] Traders may be registered below the VAT threshold, which in 2008/09 was £67,000 per year. This estimate of business stock is therefore likely to be lower than the actual number of businesses located in the district.
[8] Including sole proprietorships and or partnerships comprising only the self-employed owner-manager(s), and companies comprising only an employee director.
[9] Number of local units in VAT and/or PAYE based enterprises in 2014 (UK Business Activity, Size and Location; ONS April 2015)
[10] UK Business Count; ONS April 2015
[11] Births and deaths of enterprises as a percentage of enterprise stock; ONS 2009-2013.

Employment Sectors

Our analysis of South Kesteven's benchmarked against East Midlands and is based on the ONS Business Register and Employment Survey (BRES), Standard Industrial Classification (SIC), for 2013. This data covers employment within South Kesteven, rather than employment of the resident workforce as illustrated in the SOC analysis in **Table 4-3**.

Table 4-5 Employment by Broad Industry Sector

	South Kesteven		East Midlands	
Sector	**Employment**	**% of Total**	**Employment**	**% of Total**
1 : Agriculture, forestry & fishing	55	0.1	36,071	1.8
2 : Mining, quarrying & utilities	1,208	2.3	33,017	1.7
3 : Manufacturing	7,181	13.5	258,706	13.0
4 : Construction	2,091	3.9	78,227	3.9
5 : Motor trades	974	1.8	42,018	2.1
6 : Wholesale	3,559	6.7	98,073	4.9
7 : Retail	6,145	11.5	194,352	9.7
8 : Transport & storage	1,630	3.1	101,189	5.1
9 : Accommodation & food	4,564	8.6	126,675	6.3
10 : Information & communication	1,495	2.8	53,079	2.7
11 : Financial & insurance	676	1.3	33,794	1.7
12 : Property	940	1.8	28,062	1.4
13 : Professional, scientific/tech	2,853	5.4	120,366	6.0
14 : Business administration	2,614	4.9	180,194	9.0
15 : Public administration	977	1.8	79,339	4.0
16 : Education	5,444	10.2	199,346	10.0
17 : Health	8,359	15.7	251,932	12.6
18 : Arts, entertainment, rec.	2,528	4.7	81,797	4.1
Total	**53,295**	**100.0**	**1,996,235**	**100.0**

Source: ONS Business Register and Employment Survey (2013 data, as of March 2015)

At this high level those sectors which align most closely with the employment land uses B1a/b, B1c/B2 and B8 are: 11. Financial & insurance, 14.Business administration and support services and 13.Professional, scientific/technical (which aligns most closely with B1a and B1b uses); 3. Manufacturing (which aligns to factory uses i.e. B2); and 8. Transport & storage (which aligns with warehousing). The professional, scientific and technical sector could align research and development or office.

From above it can be seen that:

- Manufacturing employment in South Kesteven accounts for 7,181, or 13.5% of the total. This is slightly higher than the East Midlands average of 13%. The Health (15.7%), wholesale (6.7%) and retail (11.5%) sectors have a larger proportion of employees in comparison to the East Midlands averages.

- Transport & storage (8. which aligns with warehousing) employment measures 1,630, or 3.1%, in South Kesteven, which is below the East Midlands average of 5.1%. This can be attributed to port and storage activities located in other parts of the Midlands.

- Employment in business administration is significantly lower (4.9%) than the East Midlands average of 9%.This indicates a higher dependence on health, education, retail and manufacturing as the largest supplier of employment in the district with 50.9% of the workforce employed in these sectors.

- The professional, scientific and technical sector is under-represented in South Kesteven (5.4%) compared with East Midlands (6.0%), perhaps an indication of the lower skills, lower wage economy, and the distance from higher education establishments, typically associated with research and development.

- These findings contrast with the resident-based SOC analysis in **Table 4.3**, suggesting that there is a disparity between the occupations of South Kesteven residents and the employment available within the district. For example, the SOC analysis indicates that over half (40.65%) of residents work in managerial or professional occupations, whereas the BRES data shows that office-related sectors such as finance and insurance, and information and communication, are under-represented within the district. This supports the analysis in paragraph 4.7 which demonstrates a strong out-commuting flow from South Kesteven.

4.10 Summary

Analysis of the resident workforce found that the occupational profile of South Kesteven residents is broadly in line with the East Midlands average. However, there are some signs of a low-wage economy in South Kesteven, such as a low skilled workforce **(Table 4.2)**; lower earnings of workplace jobs **(Table 4.1)** compared with residents earnings; and a strong out-commuting flow **(Figure 4.1),** suggesting that those holding higher qualification are more mobile financially and occupationally, and take up positions outside the district.

This is supported by analysis of employment within the district **(Table 4.5)**, which illustrates that office-based employment sectors are significantly under-represented in comparison to the East Midlands average. This suggests a disparity between the occupation of residents and the employment available within the district, and indicates that many residents employed in management, professional and technical professions commute outside the district for work **(Table 4.3)**.

Employment within the district is marked by relatively high proportions in manufacturing, education, health, and retail whilst underperforming in business and public administration. Many of these factors are self-re-enforcing. However, the analysis presented here also suggests that to achieve economic growth the district can play to the comparative advantages it has such as the labour skills set and location advantages. Playing to strengths would mean that local residents benefit from investment and employment opportunities. This section has introduced the profile of South Kesteven with the most up to date data, benchmarked against East Midlands.

5 Quality and Characteristics of Employment Land

5.1 Introduction

This section provides a summary of the key findings of the field survey and desk research and identifies the suitability of land and premises in South Kesteven for employment uses (B1a-c, B2 and B8).

Results are summarised to provide an overview of conditions of employment clusters. Detailed and extensive field and desk research results were collected as part of the research and analysis.

The analysis allows an assessment of whether existing employment land continues to be fit for employment purpose. It also identifies those clusters that are potentially unsuitable for office, industrial or warehousing employment uses. If the demand forecasting exercise (in chapter 6) indicates a lack of demand for a particular use then those sites that score lowest against the criteria could be considered for release for other uses.

5.2 Employment Clusters

Based on the South Kesteven Core Strategy (2010), Site Allocation and Policies DPD for South Kesteven (2014) and the Council's and consultancy team's knowledge of the area, 57 employment clusters throughout South Kesteven were identified and mapped (see **Figures 5.1 – 5.6).** This section sets out the main research elements of this Employment Land Study as illustrated in **Figure 2.1.** Each element is reviewed briefly in the following sub-sections.

Employment clusters were defined through identifying existing employment designations within the adopted Local Plan, proposals that can, or have the potential to, accommodate a significant quantum of industrial/warehousing (B2/B8) or office (B1) floorspace and through a review of non-designated land with potential to accommodate employment uses.

Table 5-1 below lists the clusters that were surveyed against the site appraisal criteria set by AECOM, based on criteria outlined in the NPPG and subsequently agreed with the Council. Criteria were further tailored based on the consultancy team's experience and the specific context within South Kesteven. The clusters are a combination of existing employment sites, allocated sites and sites with planning permission for employment use.

The 57clusters comprise a total area of 547 hectares. This includes occupied employment sites, unoccupied sites and vacant land including a number of greenfield sites allocated for employment. The amount of vacant and developable land is 212 hectares[12]. (**Table 5.1**). The total supply of employment land is therefore 335ha, including vacant industrial and greenfield sites. The majority of surveyed land is Industrial employment land specifically B1c, B2 and B8 land.

The comparative analysis of the quality and characteristics of clusters for employment use in this Section is carried out on the basis of the quantity of land contained within the boundaries of the 57 clusters surveyed, as per **Figures 5.1-5.6**

[12] This does not include a large 'area of search' at Gonerby Moor.

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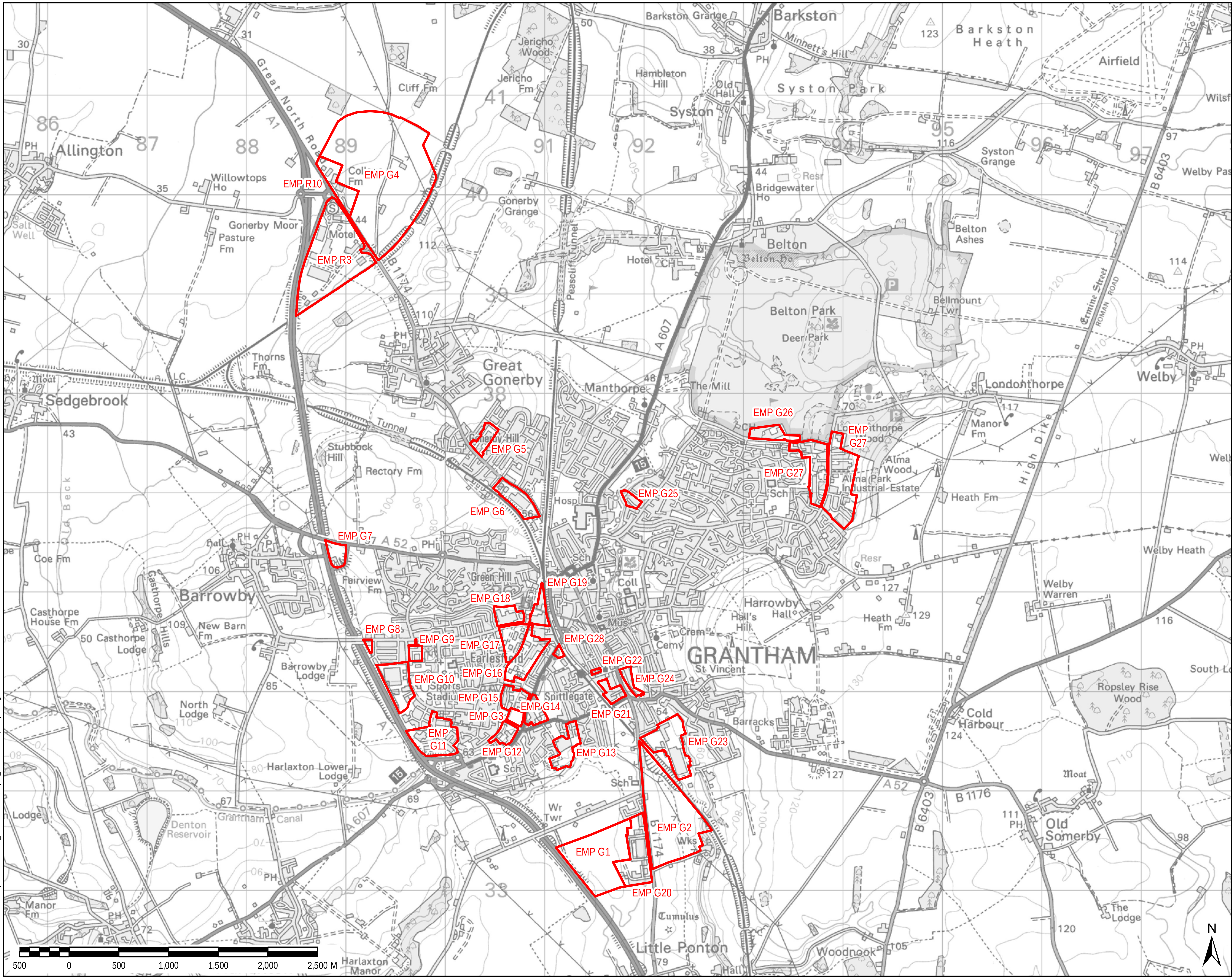
Cluster boundary



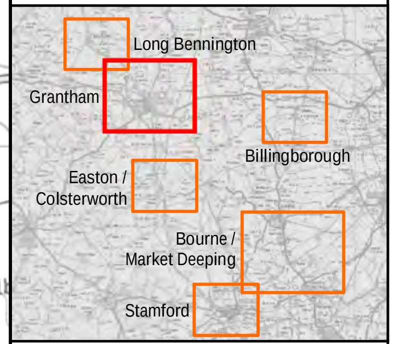


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FIGURE 5.1

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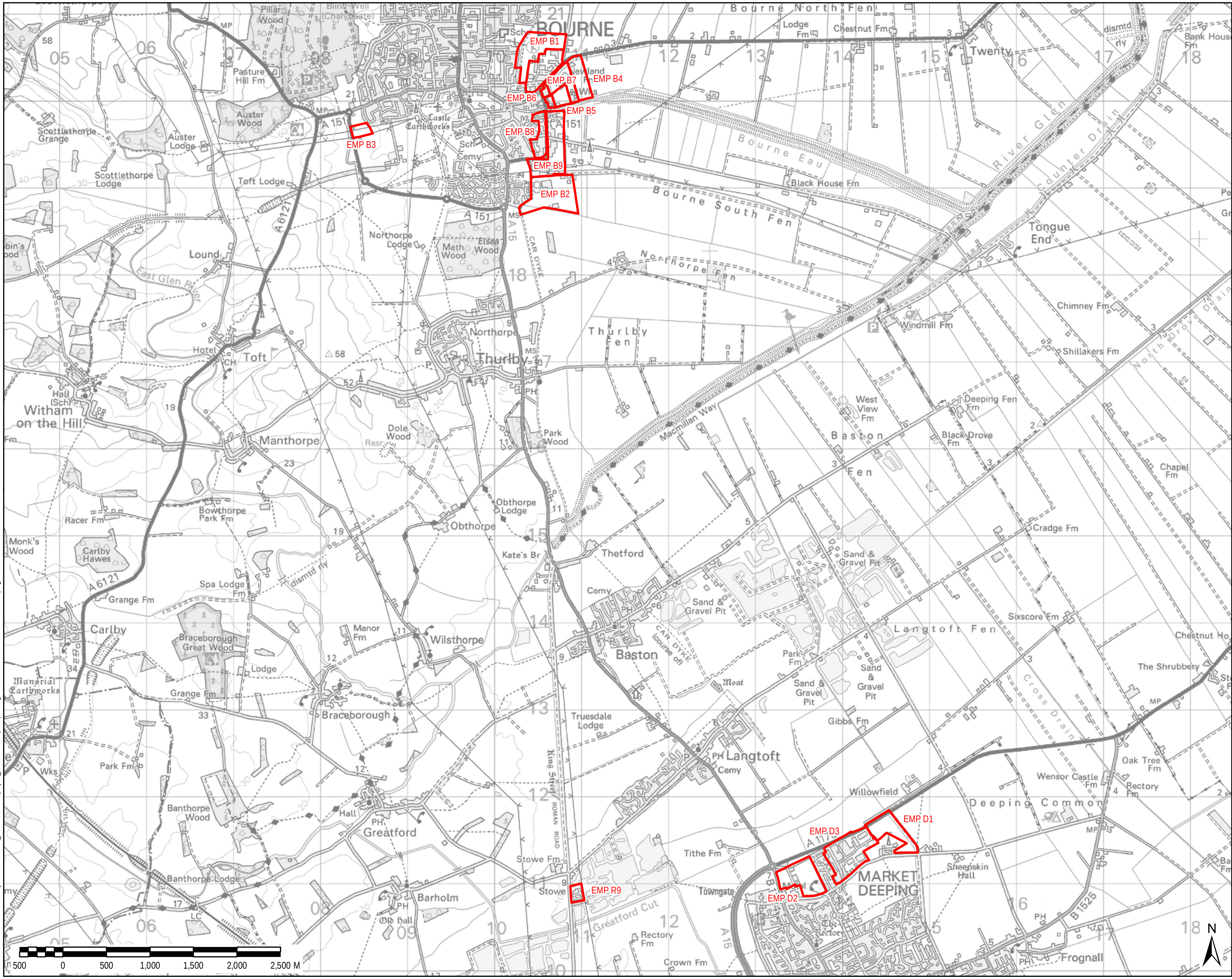

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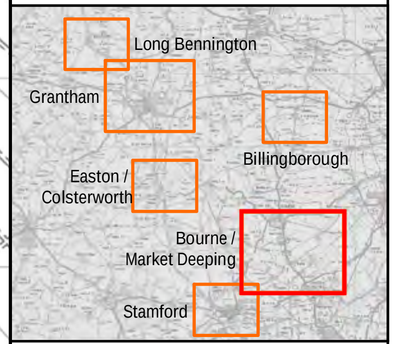

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FIGURE 5.2

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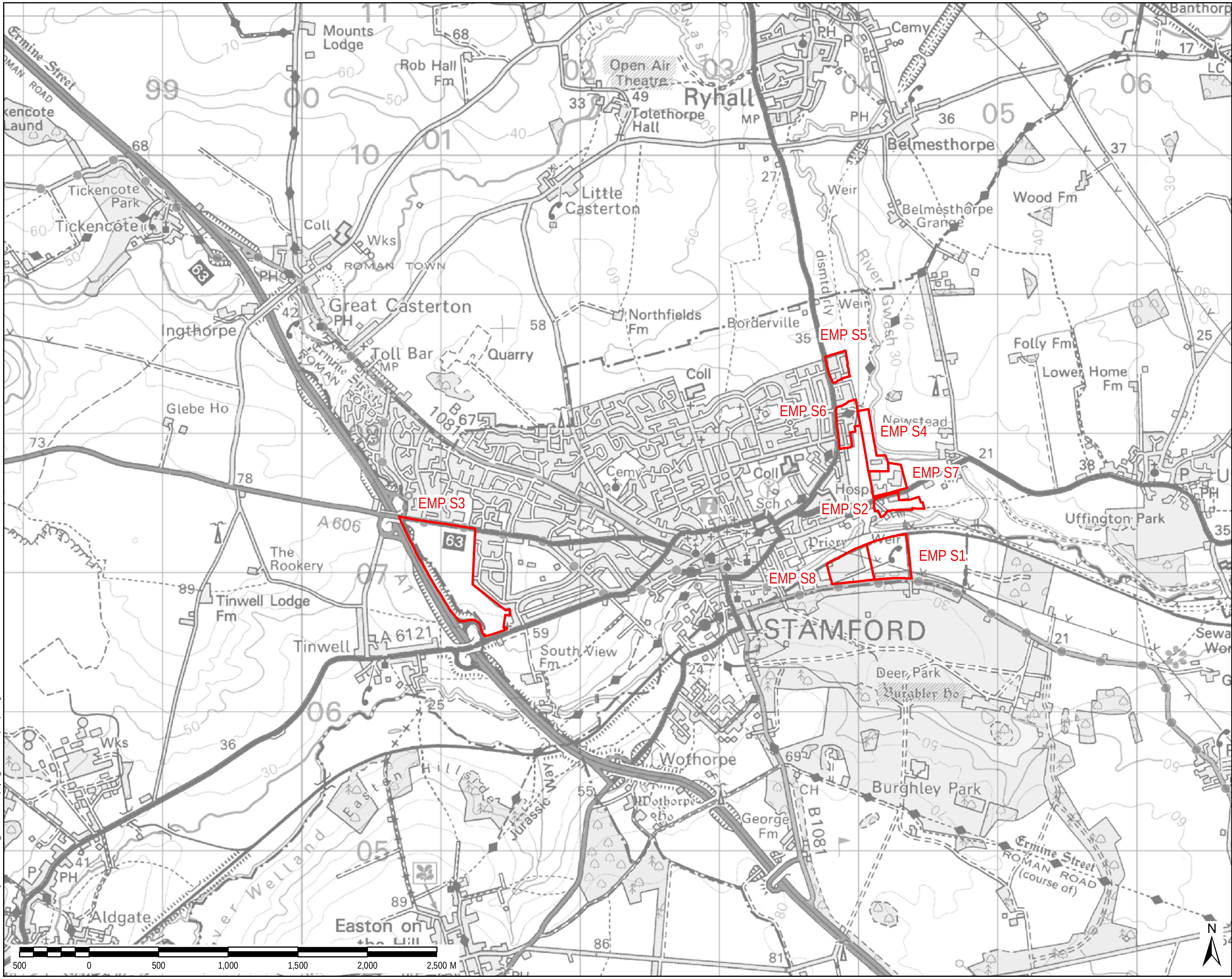

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Cluster boundary

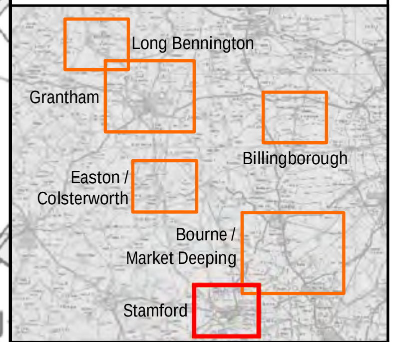

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FIGURE 5.3

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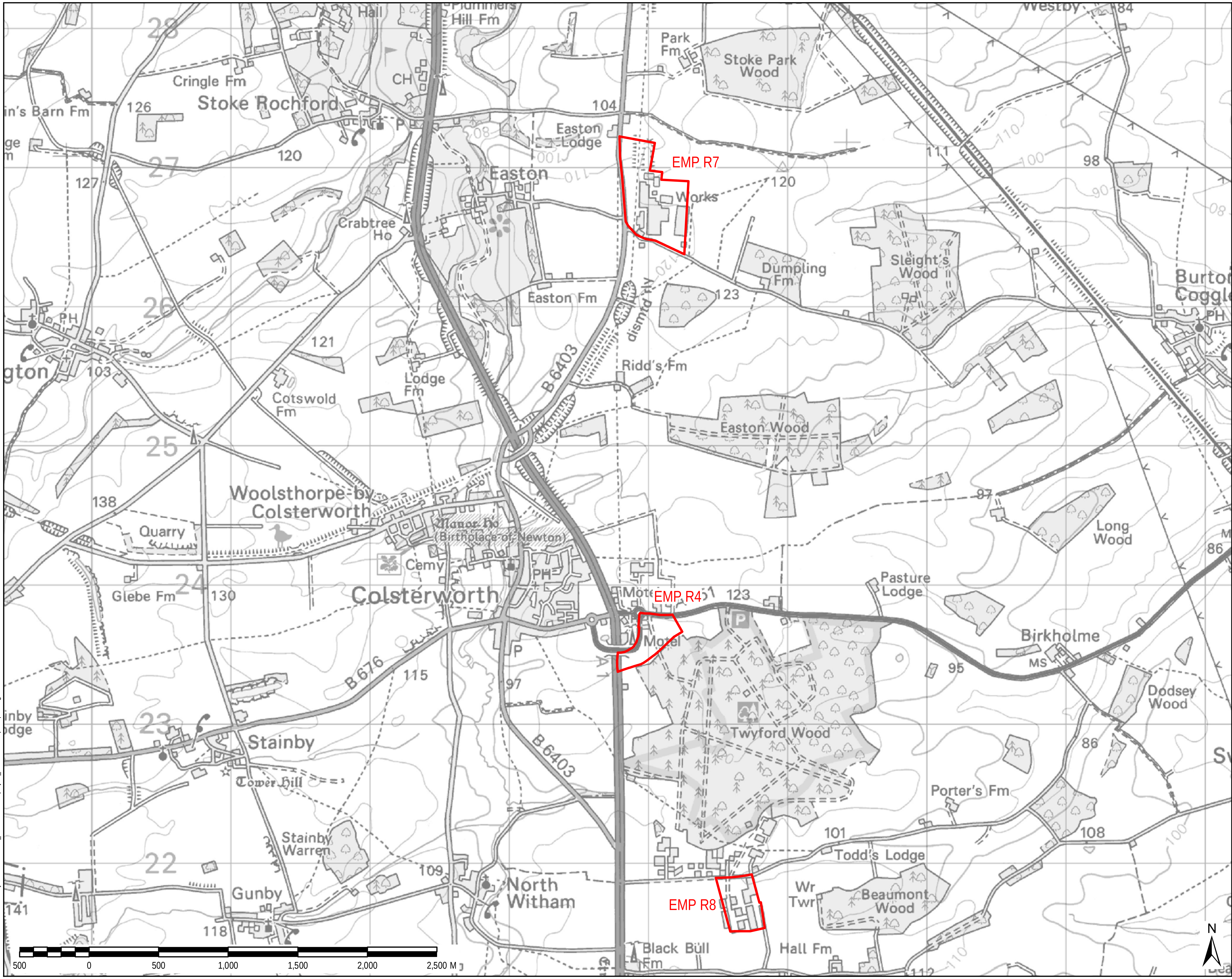

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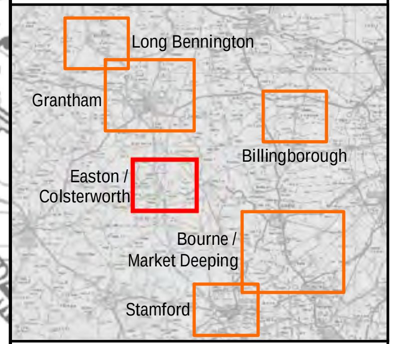

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FIGURE 5.4

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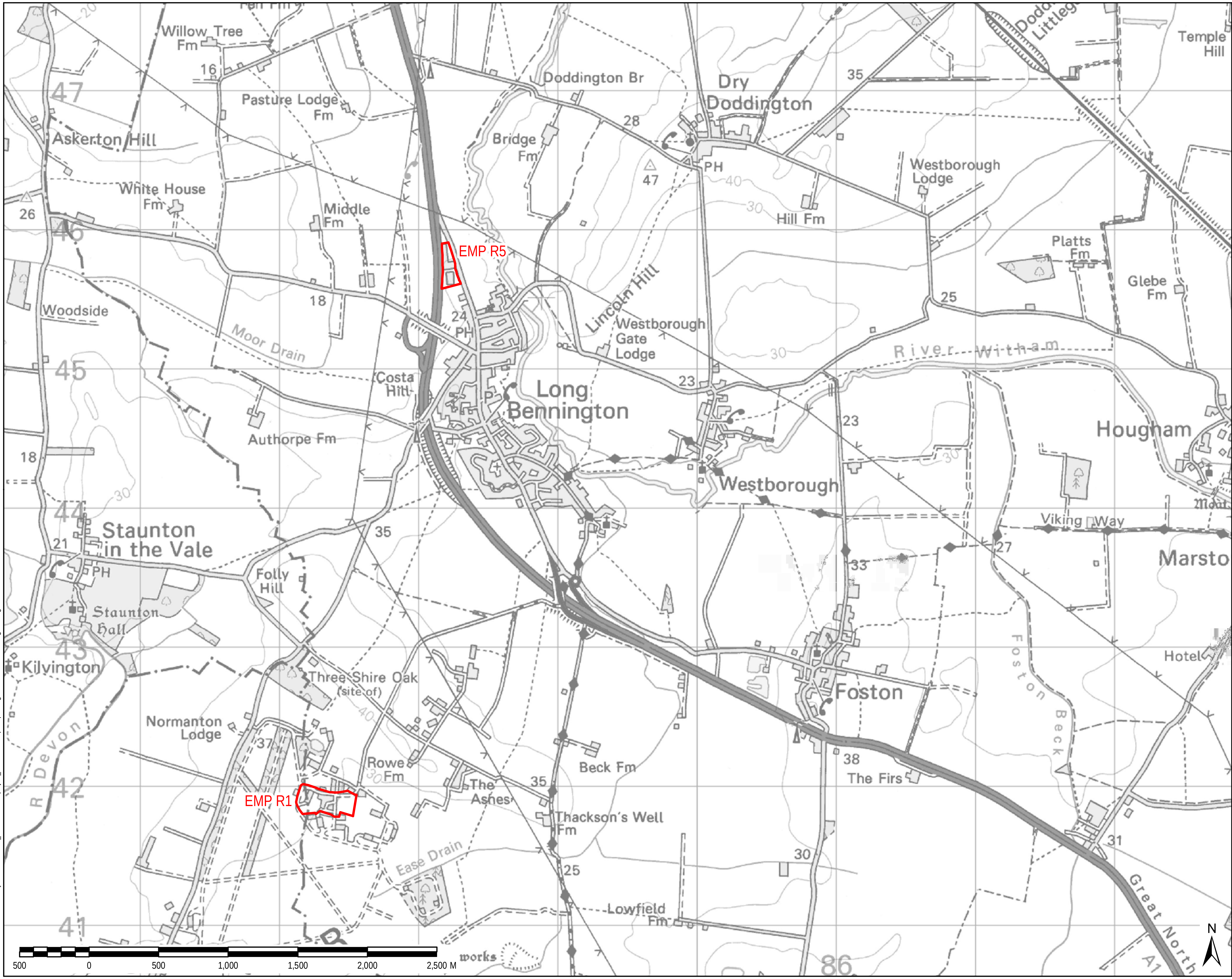

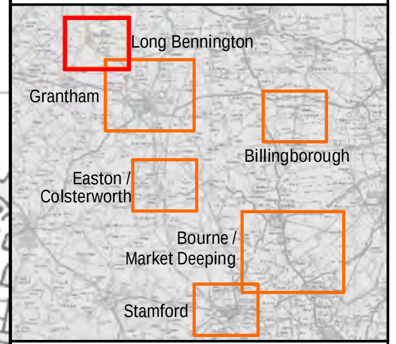

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FIGURE 5.5

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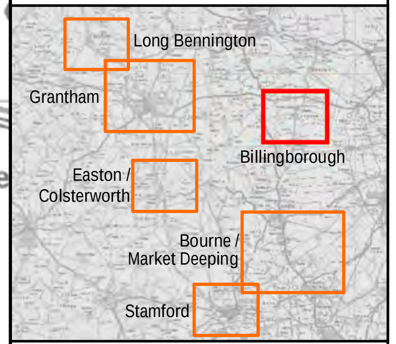

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CLUSTER SITES
BILLINGBOROUGH

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FIGURE 5.6

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Table 5-1 Surveyed Employment Clusters –February/ March 2015

AECOM Cluster No.	Employment Area/ Site Location/ Name of Cluster	South Kesteven Local Planning Policy Designation13	Land Use Typology	Employment Cluster Area (ha)(1)	Vacant Land (ha) (2)
EMP S1	Land north of Barnack Road, Stamford	STM2a [SAP]	Greenfield	8.2	8.2
EMP S2	Land south of Uffington Road, Stamford	STM2b [SAP]	B2, B8 & vacant land	2	2
EMP S3	Land adjacent to A1 off Empingham Road, Stamford	STM2c / STM3 [SAP]	Greenfield	14	14
EMP S4	Land east of Ryhall Road, Stamford	STM2d [SAP]	B2, B8 & vacant land	3	3
EMPS5	Gwash Way, East of Ryhall Road, Stamford	ExE S1 [SAP]	B2, B8	2.8	0.0
EMP S6	East of Ryhall Road, Stamford	ExE S2 [SAP]	B8 & vacant land	4.1	0.0
EMP S7	North of Uffington Road, Stamford	ExE S3 [SAP]	B2, B8	4.3	0.0
EMP S8	North of Barnack Road, Stamford	ExE S4 [SAP]	B2	6.4	0.0
EMP B1	Land north of Manning road and west of Meadow Drove, Bourne	B1a [SAP]	Greenfield site	15.7	15.7
EMP B2	Land south of Tunnel Bank, Bourne	B1b [SAP]	Vacant	21.6	21.6
EMP B3	Land South of West road and north of Elsea Park, Bourne	B1c [SAP]	Greenfield	2.9	2.9
EMP B4	Land South of Spalding Road, Bourne	B1d [SAP]	Agriculture / Greenfield	8.2	8.2
EMP B5	Land North of Bourne Eau and east of Carr Dyke, Bourne	B1e [SAP]	Agriculture / Greenfield	3.7	3.7
EMP B6	Pinfold Industrial Estate and adjacent area, Bourne	ExE B1 [SAP]	B1, B2 & B8	13.4	0.0
EMP B7	East of Cherry Holt Road, Bourne	ExE B2 [SAP]	B2	9.1	0.0
EMP B8	West of Cherry Hold Road, Bourne	ExE B3 [SAP]	B2, B8	6.6	0.0
EMP B9	East of Cherry Holt Road, Bourne	ExE B4 [SAP]	B2, B8	18.4	0.0
EMP D1	Extension to Northfields Industrial Estate, Market Deeping	DE2a [SAP]	Greenfield	12.3	12.3
EMP D2	Spitfire Way, Market Deeping	DE2b / DE3 / ExE D2 [SAP]	B8 / Greenfield	6	6
EMP D3	Northfields Industrial Estate, Market Deeping	ExE D1 [SAP]	B1, residential, community use	21.2	1.6
EMP R1	Roseland Business Park near Long Bennington	Roseland Business Park / Core Strategy Policy E1	B2 &B8	7.1	0

[13]STM = Stamford, ExE = Existing Employment, B = Bourne, DE = Market Deeping, SAP = Site Allocations Policy

AECOM Cluster No.	Employment Area/ Site Location/ Name of Cluster	South Kesteven Local Planning Policy Designation13	Land Use Typology	Employment Cluster Area (ha)(1)	Vacant Land (ha) (2)
EMP R2	Great Gonerby, North of Gonerby Moor	SAP 6 [SAP]	B2	2.7	2.7
EMP R3	Gonerby Moor, Grantham	Existing employment area / CS Policy E1	B1, B2 & B8	45.4	9.1
EMP R4	Land adjacent to A1 Colsterworth	ExE LSC2 [SAP]	B8	9.5	6.1
EMP R5	Long Bennington Business Park, Main Road, Long Bennington	ExE LSC3 [SAP]	B2 & B8	2.8	0
EMP R6	White Leather Square, Billingborough	ExE LSC4 [SAP]	B2	4.3	0.8
EMP R7	Burton Lane/High Dyke, Easton, Grantham	Existing employment area / CS Policy E1	B2	26.6	0
EMP R8	Honey Pot Lane, Colsterworth	Existing employment area / CS Policy E1	B2 & B8	10.2	0
EMP R9	King Street Industrial Estate, Langtoft	Existing employment area / CS Policy E1	B1 & B2	2.65	0
EMP G1	Land east of A1 south of Gorse Lane, Grantham (KING 31)	. Implemented planning permission	Vacant with planning permission	31.9	31.9
EMP G2	Land between A52 Somerby Hill and Spitalgate Level south of Grantham, Southern Quadrant	Southern Quadrant [policy H2B in Core Strategy	Agricultural/ Greenfield	45.9	45.9
EMP G3	Land at junction of Harlaxton Road and Trent Road, Grantham	Allocated E1.11 [1995 Local Plan]	Greenfield	2.1	2.1
EMP G4	Gonerby Moor, Grantham	SAP 6 [SAP]	Greenfield	(105.5)	-
EMP G5	Gonerby Hill Foot, Grantham	Existing employment / No current allocation	B2	4.1	0.0
EMP G6	Gonerby Road, Grantham	Existing employment / No current allocation	B2	7.9	0.0
EMP G7	Land at A1/A52 slip road, Barrowby Road, Grantham	Existing employment / No current allocation	B8	3.9	0.0
EMP G8	Dysart Road, Grantham	Existing employment / No current allocation		0.7	0.0
EMP G9	North end of Trent Road, Grantham	Existing employment / No current allocation	B8	2.1	0.0
EMP G10	Venture Way, Grantham	Part saved Local Plan allocation E1.2 / part no current allocation	Other	11.0	1.5
EMP G11	Swingbridge Road, Grantham	Existing employment area / CS Policy E1	Other	14.2	0.0

AECOM Cluster No.	Employment Area/ Site Location/ Name of Cluster	South Kesteven Local Planning Policy Designation13	Land Use Typology	Employment Cluster Area (ha)(1)	Vacant Land (ha) (2)
EMP G12	Harlaxton Road/Trent Road junction, Grantham	Existing employment area / CS Policy E1	Other	3.7	1.4
EMP G13	Springfield Park Industrial Estate, Grantham	Existing employment area / CS Policy E1	B2	7.7	0.0
EMP G14	Land at Springfield Road/ Harlaxton Road junction, Grantham	Existing employment area / CS Policy E1	B2	4.5	0.9
EMP G15	Land South of Earlesfield Lane, Grantham	Existing employment area / CS Policy E1	Other	5.6	0.0
EMP G16	Land North of Earlesfield Lane, Grantham	Existing employment area / CS Policy E1	Other	10.6	1.9
EMP G17	Land at junction of Dysart Road and Kempton Way, Grantham	Existing employment area / CS Policy E1	Other	7.1	0.7
EMP G18	Autumn Park Industrial Estate, Dysart Road, Grantham	Existing employment area / CS Policy E1	B2	4.6	0.0
EMP G19	North of Dysart Road/ west of Railway line, Grantham	Existing employment area / CS Policy E1	B2	4.1	0.0
EMP G20	Spittlegate Level, Grantham	Existing employment area / CS Policy E1	B2	15.8	0.0
EMP G21	London Road Industrial Estate, Grantham	Existing employment area / CS Policy E1	B2	3.2	0.7
EMP G22	Old School, Station Road, Grantham	Existing employment area / CS Policy E1	B2	0.4	0.0
EMP G23	Aveling Barford Site, Grantham	Existing employment area / CS Policy E1	B2	15.4	6.3
EMP G24	Inner Street, Grantham	Existing employment area / CS Policy E1	B2	2.4	0.0
EMP G25	Belton Lane Industrial Estate, Grantham	Existing employment area / CS Policy E1	B2	2.0	0.0
EMP G26	Londonthorpe Lane, Grantham	Existing employment area / CS Policy E1	B2	5.1	0.0
EMP G27	Alma Park &Withabrook Park Industrial Estates, Grantham	Existing employment area / CS Policy E1	B2	35.1	0.8
EMP G28	Old Hampsons Site, Harlaxton Road, Grantham	Existing employment area / CS Policy E1	Other	0.8	0.0
	Total			547	212

Source: AECOM South Kesteven Employment Land Field Survey 2015
Note 1: All cluster areas have been re-calculated in 2015
Note 2: Includes developable and undevelopable vacant land.

5.3 Strategic Transport Access

The strategic transport accessibility of employment areas was determined both through desk based research and site visits. Criteria used to assess this include:

- Strategic road access
- Access to public transport
- Access to railheads; and
- Availability of parking.

Strategic Road Access

Sites with very good strategic road access include those that can be accessed directly or almost immediately to an A-road, the Strategic Route Network, or Main Distributor Roads, as defined by South Kesteven's Network Management Strategy.

The 27 clusters in **Table 5.2** were considered to have very good strategic road access. The majority of these clusters have immediate access to the surrounding A roads. Most sites in Grantham have access to the A1 however they have to commute through the town thus reducing their immediate access. South Kesteven is predominately a rural district; however due to its strategic location in the East Midlands and north of London the majority of the clusters identified in the survey have good access to A roads.

Table 5-2 Employment Clusters with Very Good Strategic Road Access

AECOM Cluster No.	***Employment Area/Cluster Name***	***Area (ha)***
EMP S3	Land adjacent to A1 off Empingham Road, Stamford	28.7
EMP B1	Land North of Meadow Drive, Bourne	15.7
EMP B3	Land South of West road and north of Elsea Park, Bourne	2.9
EMP B4	Land South of Spalding Road, Bourne	8.2
EMP B6	Pinfold Industrial Estate, Bourne	13.4
EMP B7	East of Cherry Holt Road, Bourne	9.1
EMP B8	West of Cherry Hold Road, Bourne	6.6
EMP B9	East of Cherry Holt Road, Bourne	18.5
EMP G1	KiNG 31, Land east of A1 south of Gorse Lane, Grantham	31.9
EMP G3	Gonerby Moor, Grantham	2.1
EMP G4	Gonerby Hill Foot, Grantham	105.5
EMP G7	Land at A1/A52 slip road, Barrowby Road, Grantham	3.9
EMP G8	Dysart Road, Grantham	0.7
EMP G10	Venture Way, Grantham	10.9

EMP G11	Swingbridge Road, Grantham	14.2
EMP G19	North of Dysart Road/ west of Railway line, Grantham	4.1
EMP G20	Spittlegate Level, Grantham	15.8
EMP R3	Gonerby Moor, Grantham	45.4
EMP R4	Land adjacent to A1 Colsterworth	9.5
EMP R5	Long Bennington Business Park	2.8
EMP D2	Spitfire Way, Market Deeping	15.3
EMP D3	Northfields Industrial Estate, Market Deeping	21.2
	Total	**405.0**
	% of surveyed employment land	**74%**

Source: AECOM South Kesteven Employment Land Field Survey 2015

Access to Public Transport

Access to public transport for employment sites was assessed during the site survey visits and through subsequent desk-based research. This also included investigating the Transport Strategy for Grantham. During the study it was noted that Grantham had the best internal public transport system within the district however for commuting purposes this was sub-standard. A lack of regular public transport services and inter connectivity between the main towns within the district was also highlighted. The railway has been noted as having excellent north-south connections.

Sites that were considered to have relatively good access to public transport are outlined below. These included sites shown in **Table 5-3**.

Table 5-3 Employment Clusters with Good Public Transport Access

AECOM Cluster No.	***Employment Area/Cluster Name***	***Area (ha)***
EMP G3	Gonerby Moor, Grantham	2.1
EMP G5	Gonerby Hill Foot, Grantham	4.1
EMP G6	Gonerby Road, Grantham	7.9
EMP G9	North end of Trent Road, Grantham	2.1
EMP G10	Venture Way, Grantham	10.9
EMP G13	Springfield Park Industrial Estate, Grantham	7.7
EMP G14	Land at Springfield Road/ Harlaxton Road junction, Grantham	4.5
EMP G15	Land South of Earlesfield Lane, Grantham	5.6
EMP G16	Land North of Earlesfield Lane, Grantham	10.6
EMP G17	Land at junction of Dysart Road and Kempton Way, Grantham	7.1
EMP G18	Autumn Park Industrial Estate, Dysart Road, Grantham	4.6

EMP G19	North of Dysart Road/ west of Railway line, Grantham	4.1
EMP G21	London Road Industrial Estate, Grantham	3.2
EMP G22	Old School, Station Road, Grantham	0.4
EMP G24	Inner Street, Grantham	2.4
EMP G26	Londonthorpe Lane, Grantham	5.1
EMP G28	Old Hampsons Hire Site, Harlaxton Road, Grantham	0.8
EMP S2	Land south of Uffington Road, Stamford	3.3
EMP S3	Land adjacent to A1 off Empingham Road, Stamford	28.7
EMP S4	Land east of Ryhall Road, Stamford	4.2
EMP S5	Gwash Way, East of Ryhall Road, Stamford	2.7
EMP S6	East of Ryhall Road, Stamford	4.1
EMP S7	North of Uffington Road, Stamford	4.3
EMP S8	North of Barnack Road, Stamford	6.4
	Total	**137**
	% of surveyed employment land	**25%**

Source: AECOM (2015) Web based and onsite research

It is clear that areas outside of Grantham suffer from poor access to public transport. The primary mode of transport for employment purposes is private transport. It is evident that the employment clusters in the vicinity of Grantham Town centre and Stamford are best served by public transport. Travel to work by private transport is likely to be more commonplace due to the rural nature of the district and access to public transport is likely to be comparatively less of a factor in defining a well-functioning industrial employment cluster/area.

Improvements to public transport provision in the district may improve the accessibility to central London and improve the district as a destination for commuters. The railway line connection to London should attempt to maximise the proximity of the district to London.

5.4 Servicing and Parking

Servicing of Businesses

For clusters where B1/B2/B8 is the predominant land-use, it is important that there is designated and adequate space for the servicing of businesses. The suitability of existing servicing arrangements within each cluster was assessed during the field survey.

Parking provision within the District appears to be adequate with the majority of active sites having suitable parking and servicing provision.

Availability of Parking

For employment land clusters in South Kesteven, it is important that adequate parking is provided to accommodate for the needs of businesses within the cluster and the increased likelihood that employees will travel to work by car, given that public transport accessibility is generally low. The availability and type of parking within each cluster was assessed during the field survey.

Fifteen clusters were identified in the field survey as having inadequate parking arrangements; however it must be note that these are all greenfield sites that have not been developed.

Parking provision within the District has been found to be adequate in the majority of industrial clusters with many of them offering free onsite parking. Many of the businesses have sufficient parking provision for customers and employees. With high levels of parking provision available onsite, this encourages the use of private transport.

5.5 Condition of Employment Areas

Employment Areas in Very Good and Good Condition

In total 22 out of 57 surveyed employment clusters were considered to be in good or very good condition. To receive this designation over 50% of buildings within the employment cluster had to fulfil the following criteria:

Building condition

Very good – buildings in immaculate state, no signs of paint coming off, windows and window frames in very good condition, immediate surrounding/grounds well kept.

Good – building in good conditions, small areas where paint might come off, etc., grounds in reasonable state.

Quality of environment

Very good – the streets and the public realm within and surrounding the area are of very good quality. There is enough street lighting and no perceived safety issues. The business area is not polluted by noise or air pollution from neighbouring uses and/or heavy street traffic.

Good – the streets and public realm within and surrounding the business area are of good quality. Nothing in the local environment seems disturbing but it does not reach the ‘very good’ standard (some litter, street furniture shows signs of aging, etc.). There are no perceived safety issues.

Table 5-4 below lists the employment clusters with a majority (50-100%) of sites that were in Good and Very Good condition.

Table 5-4 Clusters with Majority of Sites in Good and Very Good Condition

AECOM Cluster No.	***Employment Area/Cluster Name***	***Area (ha)***
EMP S8	North of Barnack Road, Stamford	6.4
EMP B7	East of Cherry Holt Road, Bourne	9.1
EMP B8	West of Cherry Holt Road, Bourne	6.6
EMP B9	East of Cherry Holt Road, Bourne	18.5
EMP D3	Northfields Industrial Estate, Market Deeping	21.2
EMP R1	Roseland Business park near Long Bennington	7.1
EMP R3	Gonerby Moor, Grantham	45.4
EMP R5	Long Bennington Business Park	2.8
EMP R7	Burton Lane/High Dyke, Easton, Grantham	26.6
EMP R9	King Street Industrial Estate, Langtoft	2.6
EMP G5	Gonerby Hill Foot, Grantham	4.1
EMP G6	Gonerby Road, Grantham	7.9
EMP G8	Dysart Road, Grantham	0.7
EMP G10	Venture Way, Grantham	10.9
EMP G11	Swingbridge Road, Grantham	14.2
EMP G17	Land at junction of Dysart Road and Kempton Way, Grantham	7.1
EMP G20	Spittlegate Level, Grantham	15.8
EMP G25	Belton Lane Industrial Estate, Grantham	1.9
EMP G26	Londonthorpe Lane, Grantham	5.1
EMP G28	Old Hampsons Hire Site, Harlaxton Road, Grantham	0.8
	Total	**214.8**
	% of surveyed employment land	**39%**

Source: AECOM South Kesteven Employment Land Field Survey 2015

Employment Areas with sites in Poor or Very Poor Condition

Of the surveyed employment clusters,10 were recorded to have a majority (50-100%) of sites in poor or very poor condition. To fall into this category clusters had to fulfil the following criteria:

Building condition

Poor – buildings and surrounding land in poor state of repair or poor quality, e.g. deterioriation, surrounding land not maintained.

Very poor – building in use, but in a very poor state of repair; e.g. peeling paint, vandalism and litter.

Quality of environment

Poor – the streets and the public realm within and surrounding the cluster are of poor quality (potholes, litter, poorly maintained or damaged street furniture). Inadequate street lighting and some perceived safety issues. Noise or air pollution from neighbouring uses and/or heavy street traffic.

Very poor – the streets and the public realm within and surrounding the cluster are of very poor quality (potholes, litter on street, not collected rubbish, etc.) Inadequate street lighting and there are perceived safety issues. Noise and/or air pollution from neighbouring uses and/or heavy street traffic.

Table 5-5 Clusters with majority of sites in Poor/Very Poor Condition

AECOM Cluster No.	***Employment Area/Cluster Name***	***Area (ha)***
EMP G7	Land at A1/A52 slip road, Barrowby Road, Grantham	3.9
EMP G12	Harlaxton Road/Trent Road junction, Grantham	3.7
EMP G16	Land North of Earlesfield Lane, Grantham	10.6
EMP G19	North of Dysart Road, Grantham	4.1
EMP G21	London Road Industrial Estate, Grantham	3.2
EMP G24	Inner Street, Grantham	2.4
EMP S2	Land south of Uffington Road, Stamford	3.3
EMP S7	North of Uffington Road, Stamford	4.3
EMP B6	Pinfold Industrial Estate, Bourne	13.4
EMP R4	Land adjacent to A1 Colsterworth	9.5
	Total	**58.4**
	% of surveyed employment land	**11%**

Source: AECOM South Kesteven Employment Land Field Survey 2015

Conclusions on Conditions of Employment Areas

Clusters throughout the district vary with regards to quality of environment and buildings. 20 clusters were observed as having good or very good environment, indicating sites with good landscaping, parking provision, quality buildings and surrounding public realms. 10 clusters were identified as having a poor quality environment, this indicated incidents of fly tipping, poor quality buildings in need of refurbishment and poor quality paving. Approximately one quarter of the sites were identified as having an average quality of environment. This indicates clusters that could be improved by enhancing the external facades, public realm and surrounding area. It must also be noted that South Kesteven is predominately a rural district with a history of manufacturing thus a quantity of the existing industrial stock will be dated and require modernisation for new business uses.

Having a stock of poorer quality premises and land can also be a positive as it ensures that there is scope for redevelopment of sites to provide new floorspace when such demand arises. Alma Park industrial area is an example of a cluster that contains a variable quality of sites and premises yet provides good opportunities for small, cost-conscious, businesses to move into the Grantham area whilst benefitting from the good strategic road access that the cluster provides.

5.6 Vacant and Greenfield Land

Information on vacant land and land with vacant buildings within employment areas was collected during the field survey. Vacant developable land can be defined as vacant land which is within or associated with an existing cluster. There is a distinction between vacant developable land and greenfield land which is vacant undeveloped land separate from an existing cluster. The vacant and greenfield land was measured using Geographic Information Systems (GIS) software. The estimated vacant land is shown in table 6.10 below. The total developable vacant land was calculated by taking away vacant land that is effectively undevelopable, such as nature reserves or land that has natural constraints such as topographical or watercourses running through it. The developable vacant land is 93 hectares. Greenfield sites that have potential to be developed for employment uses are shown at Table 6.11. These total 119 hectares. The greenfield sites do not include the large 'area of search' around Gonerby Moor. The areas of vacant and greenfield land are shown on a series of maps in Appendix A.

Table 6.10 Estimated Vacant Developable Land in South Kesteven

Employment Cluster Number and Name	*Type of Vacant Land*	*Size (ha)*	*Town*
EMP B2	Development site	21.6	Bourne
EMP D3	Development site	1.6	Market Deeping
EMP G1	Development site	32.0	Grantham
EMP G10	Development site	1.5	Grantham
EMP G12	Development site	1.4	Grantham
EMP G14	Development site	0.9	Grantham
EMP G16	Development site	1.9	Grantham
EMP G17	Development site	0.7	Grantham
EMP G21	Development site	0.7	Grantham
EMP G23	Development site	6.3	Grantham
EMP G27	Development site	0.8	Grantham
EMP R2	Development site	2.7	Grantham
EMP R3	Development site	9.1	Grantham
EMP R4	Development site	6.1	Colsterworth
EMP R6	Development site	0.8	Billingborough
EMPS2	Development site	2	Stamford
EMP S4	Development site	3	Stamford

Total		**93**	

Source: AECOM (2015);

Table 6.11 Estimated Greenfield Developable Land in South Kesteven

Employment Cluster Number and Name	*Type of Vacant Land*	*Size (ha)*	*Town*
EMP B1	Greenfield site	15.7	Bourne
EMP B3	Greenfield site	2.9	Bourne
EMP B4	Greenfield site	8.2	Bourne
EMP B5	Greenfield site	3.7	Bourne
EMP D1	Greenfield site	12.3	Market Deeping
EMP D2	Greenfield site	6	Market Deeping
EMP G2	Greenfield site	45.9	Grantham
EMP G3	Greenfield site	2.1	Grantham
EMP S1	Greenfield site	8.2	Stamford
EMP S3	Greenfield site	14	Stamford
Total		**119**	

Source: AECOM (2015);

5.7 Additional Employment Sites in Grantham

The Grantham Capacity and Limits to Growth Study (2015), which was carried out in parallel with the employment land study, identified a number of growth areas and sites suitable for housing and/or employment growth adjacent to Grantham. These sites are shown in the figures below.

The capacity study does not recommend that these sites are allocated, they are simply sites that have been assessed as suitable in land use terms for employment use. Decisions on which sites to be allocated should be based on the balance of supply and demand in the district and the wider economic area.

Figure 5-7: Potential employment sites within the Southern Quadrant urban extension

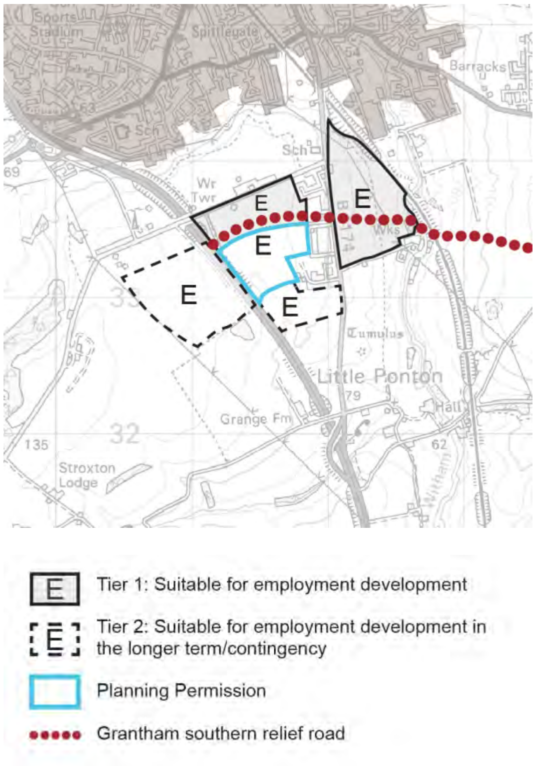


Figure 5-7 shows a cluster of sites south of Grantham within the Southern Quadrant area. The capacity study estimates there is 113 hectares of land (excluding land with planning permission) in this area which is potentially suitable for future employment. The sites shown include the allocated employment sites within the southern quadrant, but also include additional areas of land to the north, south and west of the consented KiNG 31 employment area (shown in blue above).

Figure 5-8: Potential employment sites at Gonerby Moor

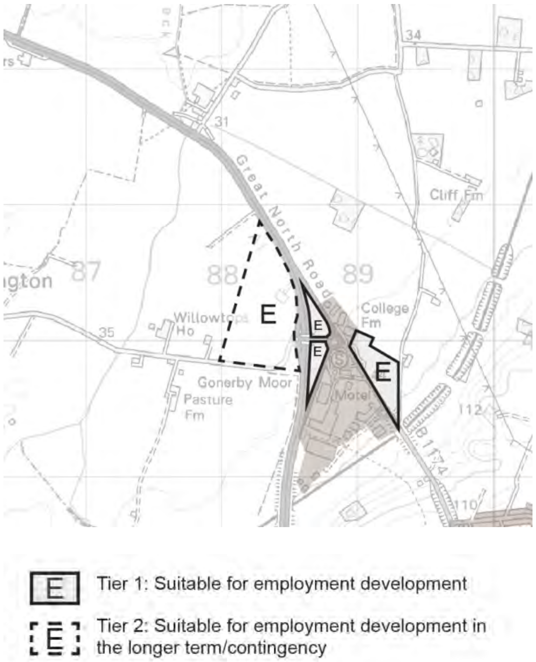
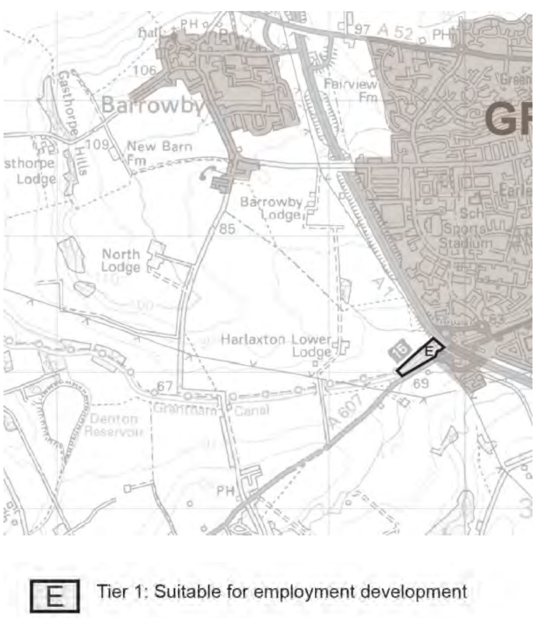


Figure 5-8 shows sites with potential for employment use at Gonerby Moor, as identified in the Grantham capacity and limits to growth study. This totals 56 hectares and includes a small part of the 105 hectare 'area of search' east of the A1 (policy SAP6), plus the land between the A1 and junction with the Great North Road and a further site west of the A1.

Figure 5-9: Small potential employment site west of Grantham



The final site that is included in the Grantham capacity and limits to growth study with potential for employment or commercial uses is a small site (3.5 hectares) west of the A1 and north of Harlaxton Road (Figure 5-9).

These sites are considered in the conclusions and recommendations in terms of potentially being allocated as future sites.

5.8 Alma Park Industrial Estate

The Alma Park Industrial Estate (Cluster G27) has been commented on separately as it is a key employment area in South Kesteven and one for which as separate viability report has been provided. The estate was observed to have positive characteristics. It is located in the North East of Grantham town and has access to the A52 however it suffers from poor connections to the A1 and HGV traffic is routed through the town which is problematic. There is a mix of mainly B2 and B8 uses onsite. Access to facilities and amenities, and public transport were considered to be good, and all premises were observed to have adequate parking.

Premises were observed to be in good condition. The environment and public realm surrounding the majority of the cluster was considered to be good, although some potential for improvement was observed. Very low levels of vacancy were observed during the site survey, This was re-iterated during consultation with market agents who indicated that low rental rates and smaller sized units were the main factors in locating at the site.

This is also supported by the findings of the separate viability review of Alma Park provided to South Kesteven District Council which does not recommend releasing the employment area for other uses.

5.9 Conclusions

AECOM's qualitative survey of employment land in South Kesteven comprised of a field visit of 57 employment clusters combined with elements of desk research, including consultations with property market agents. This assessment was carried out against site appraisal criteria set by AECOM and subsequently agreed with the Council. A comparative analysis of the quality and characteristics of clusters for employment uses was undertaken on the basis of the quantity of land contained within the lined boundaries of clusters.

With regards to designated employment clusters (allocated as employment sites as listed in Table 5.1) the majority are well functioning, predominantly industrial, clusters of employment land. Most have good/ very good access to the strategic road network and are in adequate condition, being identified as either in very good, good or average condition. These are generally located in strategic locations in close proximity to A roads. The majority of units in Stamford and Bourne are currently occupied with low levels of vacancy.

The surveyed 'non-designated' or 'other designated' clusters (clusters surveyed in the 2013 ELS) were more mixed in quality with several performing well and others identified as being of poor overall quality. The majority of clusters located in Grantham are adequate for current employment uses. However many would need upgrading and modernisation for future employment uses according to consultation with commercial agents.

There are generally low levels of vacancy in Grantham although there are some pockets of 'large box' B2 and B8 units located in Cluster EMP G9, EMP G10 and EMP G16 that are currently vacant. It was identified during market consultation that there is a requirement for 1,000-3,000sqm units in Bourne, Stamford and Grantham. There is currently an oversupply of units in Gonerby Moor with some sites and units vacant for a number of years.

Overall, there are 547 hectares of allocated or potential employment land in South Kesteven. Of this, 93 hectares is vacant land within employment clusters. However, this does include unimplemented planning permissions such as the 32 hectare KiNG 31 site. There are also a number of greenfield sites which are either allocated or with potential for employment, totalling 119 hectares. This does not include a large ‘area of search’ at Gonerby Moor of over 100 hectares.

In Chapter 6 we will discuss the future demand forecast for employment land in the district.

6 Quality and Characteristics of Employment Land

6.1 Introduction

This section projects the future demand for industrial land and office floorspace in South Kesteven for the period 2015 to 2036

6.2 Methodology

Our approach to estimating demand for industrial land and office floorspace is compliant with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG).

One approach to forecasting employment land requirements is to use employment predictions based on macro-economic forecasts. Macro-economic forecasts provide a top down logic to forecasting based on national or regional economic growth and the redistribution of that growth across an area. Typically these forecasts place less emphasis on local economic circumstances.

An alternative approach is to project forward the historic rate of change in B-use class floorspace. The downside to this approach is that it assumes the future rate of floorspace delivery will be the same as that of the past. For example, the manufacturing sector has declined over the last few decades but it may not be inappropriate to assume that the rate of decline will continue over the long term as the sector is likely to have a minimum size threshold to help support an increasingly service sector based economy.

To retain the strengths and overcome the weaknesses of these two approaches our forecasting method uses elements of macro-economic forecasts and historic trends. In summary our approach to estimating the future demand for B-use class floorspace is to:

- Determine the suitable functional economic market area (FEMA) for South Kesteven, for which to forecast demand for employment land
- Review past trends in floorspace and employment
- Review projections in office and industrial employment and future floorspace demand projections
- Combine past trends and future projections, and forecast demand for employment floorspace across the FEMA
- Consider the effects of any deviation away from past trends of growth as a consequence of new development and infrastructure provision
- Produce a district-wide estimate of the future office floorspace and industrial land requirement, taking into account demand for land by users of industrial land.

6.3 The Functional Economic Market Area

The PPG states that needs should be assessed in relation to the relevant functional economic market area[14]. Industrial and office property markets often do not correspond to local government administrative boundaries. Businesses searching for sites or premises will typically consider a

[14] PPG, paragraph 009 Reference ID: 2a-009-20140306

number of similar locations across an area which may not correspond to a local authority administration boundary. This area is termed the ‘Functional Economic Market Area’ (FEMA). Property market locations within the FEMA will often have similar characteristics such as the labour market structure, access to market areas and suppliers, rental values, appropriate size and grade of stock.

For the purpose of this study we define the Functional Economic Market Area (FEMA) to be:

- South Kesteven;
- Rutland
- South Holland, and;
- Peterborough.

This definition has been informed by desk-based research and discussed and agreed with property market agents.

6.4 Historic Trends in Floorspace

The Valuation Office Agency (VOA) records the amount of floorspace in an area for tax purposes (the assessment of business rates) by building type. In order to capture historic trends in floorspace, we have used the latest available data published by the VOA[15]. The historic employment floorspace across the FEMA by office (B1a/b), industry (B1c/B2) and warehousing (B8) is shown in **Table 6-1**.

Table 6-1 Change in Industrial and Office Floorspace, 2005 to 2012

Business Type	2005 (sqm)	2012 (sqm)	Difference (%)	CAGR (%)
FEMA Office	542,000	587,000	8.3%	1.1%
FEMA Industrial	3,794,000	3,221,000	-15.1%	-0.6%
FEMA Warehousing	440,000	745,000	69.3%	7.8%

Source: AECOM; VOA Business Floorspace (Experimental Statistics) 2012 (latest data available).
Note: CAGR: Compound Annual Growth Rate. Figures may not sum due to rounding.

Table 6-1 shows that while the stock of industrial floorspace has decreased over the period covered, the stock of warehousing has increased substantially. While this has resulted in an overall loss of B1c/B2/B8 floorspace, the proportion of warehousing floorspace has increased from 10.4% to 18.8%. The quantum of office floorspace has also expanded over this period. The Compound Annual Growth Rates (CAGR) for industrial and office uses for the FEMA feed into the synthesis demand forecast in **Section 6.7.**

[15] VOA, (2012); Business Floorspace (Experimental Statistics) available at: http://www.voa.gov.uk/corporate/statisticalReleases/120517_CRLFloorspace.html.
Although this source does not reflect the current floorspace provision, we consider trends across the maximum time period in order to understand long term trends in floorspace growth across the FEMA.

Historic employment data is drawn from the Annual Business Inquiry (ABI) between 1998 and 2008[16] and the Business Register and Employment Survey between 2008 and 2014. Both datasets are compiled by the Office for National Statistics (ONS). They are both expressed at a Standard Industrial Classification (SIC) level, not by use class. To estimate the number of employees by use industrial land class (office, industry and warehousing uses, as per our ELS definition) we have identified those sectors which typically operate from B use class land. By this approach we estimate workplaces employment by office (B1a/b), industry (B1c/B2) and warehousing (B8) as set out in **Table 6-2**.

Table 6-2 Change in Office and Industrial Employees, 2005 to 2012

Business Type	2005	2012	Difference (%)	CAGR
FEMA Office	33,600	41,400	23.2%	1.8%
FEMA Industrial	8,600	7,900	-8.1%	-1.2%
FEMA Warehousing	17,300	18,200	5.2%	1.5%

Source: AECOM; ONS 2015[17]. Figures may not sum due to rounding.

Comparison between **Table 6-1** and **Table 6-2** shows that the number of employees in office associated with has grown faster than floorspace, indicating an increased density of use. While also positive, the growth in warehousing employment is relatively modest in comparison with the increase in floorspace. These historic employment rates of growth inform the synthesis employment land demand forecast in **Section 6.7**.

6.5 Employment Projections

Employment forecasts were taken from the 2014 South Kesteven SHMA[18], which are based on Experian Baseline Forecasts. The Experian forecasts include expectations of how different sectors in the economy will perform at a national and regional level in the context of the local economic structure. They are based on past economic performance and assume that historical relationships between local sector performance relative to the region and the UK will remain consistent in the future. **Table 6-3** presents the employment forecasts adjusted in line with the plan period.

Table 6-3 Employment Forecasts, 2015 to 2036

Use Class	2015	2036	CAGR (2015-36)
FEMA Office	51,200	73,000	1.7%
FEMA Industrial	24,100	19,100	-1.1%
FEMA Warehousing	21,800	27,100	1.0%

Source: AECOM; South Kesteven SHMA (2014). Figures may not sum due to rounding.

[16] Data from 2004 and earlier does not exclude Managed Service Companies. See below for a full explanation: https://www.nomisweb.co.uk/articles/446.aspx?Session_GUID={4AAA2346-D97C-459A-8634-585F0186FB3C}
[17] Note: the ABI series has been adjusted to account for the discontinuity between ABI and BRES in accordance with ONS guidance.
[18] South Kesteven SHMA (2014) Figure 23.

Table 6-3 shows that employment in sectors which use office premises in South Kesteven is forecast to grow at a compound rate of 1.7% per annum across the FEMA. Employment in sectors which use industrial premises is expected to decline at a similar rate as employment in warehousing is anticipated to grow (-1.1% and 1% respectively) across the FEMA. These CAGRs are used to inform the synthesis employment land demand forecast set out in the next paragraph.

6.6 Calculating the Rate of Growth

To project employment land requirements we look at how floorspace and employment rates have changed, over the course of at least one business cycle to capture both stronger and weaker rates of growth historically, and assume a continuation of their changing dynamics over the forecast period. We use future employment as the known variable and floorspace as the unknown. We look at these variables across the FEMA because this is best representative of the dynamics of the wider property market which acts upon South Kesteven.

The ratio between historic floorspace and employment CAGRs is applied to the future employment variable to estimate future floorspace demand. For instance, if employment has historically grown faster than floorspace we would expect future employment to grow faster than future floorspace. The results of this process are shown in **Table 6-4**.

Table 6-4 Synthesis Forecast for Employment Floorspace across the FEMA

Business Type	Historic Floorspace CAGR	Historic Employment CAGR	Adjustment rate	Future Employment CAGR	Average annual floorspace demand
	(2005-2012)	*(2005-2012)*		*(2015-2036)*	
	A	*B*	*B/A*	*C*	*B/AxC*
FEMA Office	1.1%	1.8%	0.7	1.7%	1.1%
FEMA Industrial	-0.6%	-1.2%	0.5	-1.1%	-0.5%
FEMA Warehousing	7.8%	1.5%	5.3	1.0%	5.4%

Source: AECOM calculations 2015. Figures may not sum due to rounding.

Table 6-4 above calculates the synthesised CAGR for office, industrial and warehousing uses for the period 2015 to 2036. Based on this data office floorspace is projected to grow at a compound rate of 1.2% per annum, a rate in line with that observed historically. By contrast, the industrial compound rate of growth is projected to be -0.5% per annum, a rate similar to the -0.6% observed historically. Warehousing floorspace is projected to expand by 5.4% per annum slightly lower than the annual historic rate of growth (7.8%). We consider these results further below.

6.7 Factors Which Could Create A Step Change in Demand

The Experian employment forecasts are based on past economic performance and assume that historical relationships between local sector performance relative to the region and the UK will remain consistent in the future. Local area interventions in South Kesteven, such as new infrastructure, could mean that demand deviates away from the average annual floorspace demand rates presented in **Table 6-4**. We consider two local factors below.

Growth Agenda

The first factor is the ambition to grow the district's economy faster than before, especially around Grantham. The town was awarded Growth Point Status in 2006 following a funding bid from South Kesteven District Council and Lincolnshire over three years[19]. The status has subsequently ended; however, the ambition for growing Grantham has remained.

The Core Strategy outlines that the vision for Grantham is to turn the town into an economic centre, not just in the district but also sub-regionally[20]. The target for Grantham is to deliver 7,680 net new homes and more employment space from 2006 to 2026. In Grantham housing growth will largely focused upon the Southern and North West Quadrant which are identified as having capacity for an additional 7,500 homes, new employment space and community facilities. The more recent Strategic Housing Market Assessment (SHMA) suggests that 688 new homes will be required annually up to 2036.

The Greater Lincolnshire LEP shares the Council's ambitions plans for growth in the District. The LEP aspires to bring forward 140ha of employment land over the Strategic Economic Plan (SEP) time period[21]. To deliver 140ha of new employment land is ambitious particularly over the local plan period and would be in excess of past rates of change.

A Strengthening Industrial and Logistics Sector

The second key factor is Grantham's strategic location on the A1 which provides the district with the opportunity to tap into the growing industrial and logistics sector. Broadly, demand for industrial and logistics floorspace in 2014 increased with investment in the UK reaching an all-time high for the sector and floorspace take up rising[22]. In the first half of 2015, £3.05 billion was invested in industrial and logistics property UK-wide, a substantial increase in the rate of investment to the comparative figure of £4 billion over the whole of 2014. As a sign if market optimism speculative investment in floorspace increased by 325% in the first half of 2015 over the previous half year[23]. Though these trends are short term, South Kesteven is well positioned to benefit from this increase in demand for logistics sector land and premises given its locational benefits and access to the strategic road network.

New Infrastructure: The Grantham Southern Relief Road

The third key local factor is the Grantham Southern Relief Road which will play a part in strengthening Grantham a place to do business. This 3km distribution road to the south of Grantham will link a new junction on the A1 with the A52 at Somerby Hill, bridging the Witham valley. This strategic relief road is designed to join the A1 and to improve links across the district. It was granted panning permission in February 2015. It will provide direct access to the KING 31 site (Cluster Emp G1) and is forecast by the Lincolnshire LEP to generate 1,000 new permanent jobs during the planning period. The road is a strategic pillar in the Strategic Economic Plan for delivering growth in the district and Lincolnshire.

[19] Grantham Growth Point Partnership, (2008); Grantham Growth Point 2008 Programme of Development.
[20] South Kesteven District Council, (2010); Core Strategy.
[21] Greater Lincolnshire LEP, (2014); Strategic Economic Plan.
[22] Lambert Smith Hampton, (2015); Industrial & Logistics Market 2015: Summary Report.
[23] Lambert Smith Hampton, (2015); Industrial Investment H1 2015 mid-year investment update.

Figure 5-1 Southern Relief Road Images

Source: Lincolnshire County Council.

6.8 Demand Forecast Range

There are a number of reasons why it is helpful to consider a range in the demand for employment land. A range recognises that there are challenges in accurately forecasting economic trends over the long term. All forecasts are inherently uncertain and the future performance of an economic variable can be influenced by many unknown factors that cannot be exhaustively captured within any forecast of the future. The impact of such unknowns increases as the timeframe of the forecast increases. Furthermore there is uncertainty over the timing of investment of Grantham Growth programme, whether the logistics sector will continue to perform strongly, and whether the full scale of the ambition for development is realised, and the impact of Grantham Southern Relief Road on demand for employment land and space over the long term.

Rate of Growth Range

To reflect the challenges in accurately forecasting economic trends over the long term, and to capture the possible outcomes resulting from the local factors as listed above, some of which may have the potential to influence demand, we apply a factor of +/- 10% to our CAGR demand forecast set out in **Table 6-4** (termed the central growth rate) to provide a forecast range. This provides three growth rates as presented in **Table 6-5**

Table 6-5 South Kesteven Demand Forecasts

	Adjusted CAGRs		
Growth Rate	***Office***	***Industrial***	***Warehousing***
Low	1.00%	-0.47%	4.86%
Central	1.11%	-0.52%	5.40%
High	1.22%	-0.57%	5.94%

Source: AECOM (2015). Figures shown at two decimal places.

6.9 South Kesteven Floorspace Forecast

Table 6-6 sets out the additional demand for floorspace from 2015 to 2036[24]. It shows that the requirement for additional office floorspace in South Kesteven by 2036 is estimated to be between 20,700sqm and 25,900sqm. The expansion in demand for warehousing floorspace (350,400sqm to 483,700sqm) exceeds the contraction in demand for industrial floorspace (82,400sqm to 99,700sqm).

Table 6-6 Office and Industrial Floorspace Demand Forecast (sqm)

	Additional Floorspace Demand at 2036		
	Net Low Growth	Net Central Growth	Net High Growth
Office	20,700	23,300	25,900
Industrial	-99,700	-91,100	-82,400
Warehousing	350,400	413,600	483,700
Total	**269,200**	**345,800**	**427,200**

Source: AECOM 2015.

6.10 The Forecast for Industrial Land to 2036

The PPG recommends that future employment floorspace should be converted to employment land requirement using plot ratios[25]. A plot ratio is a measure of the density of development on a site and a ratio of gross floor area to the plot area. Though amended and replaced by the PPG, the ODPM Employment Land Reviews Guidance Note[26] provides useful information on standard plot ratios for industrial uses. The Note suggests a suitable plot ratio of 1:0.35 to 1:0.45 (land to premises, over one storey) for manufacturing and 1:0.40 to 1:0.60 (land to premises, over one storey) for warehouse uses. Applying a ratio of the average of the median of each range for industrial and warehousing uses independently, we calculate that the floorspace demand set out in

[24] In order to estimate these values we have applied the historic floorspace CAGR outlined in **Table 6-1** to estimate floorspace growth from 2012 to 2015.
[25] Planning Practice Guidance (PPG) paragraph 034 reference ID: 2a-034-20140306
[26] Office of the Deputy Prime Minister (ODPM), (2004); Employment Land Reviews: Guidance Note.

Table 6-6 is the equivalent of 45.2ha, 59.9ha and 76.1ha (low, central case and high growth rates respectively).

The land requirement forecasts set out in **Table 6-7** take into account existing vacancy (estimated to be broadly 5% across the District) and the need to retain an appropriate level (5%) of vacant or derelict land while sites are prepared for new occupiers. Termed 'frictional vacancy', this represents the optimum level of surplus capacity in the market at a given time to allow for an efficient churn of occupancy. The rate of 5% is an industry standard and suitable for South Kesteven.

Table 6-7 Industrial Land Requirement in Hectares, 2015-2036

Existing Provision (Excluding Vacant and Developable Land)			***Stock (ha)***	
A	Current supply of occupied industrial land (2015)		284.7	
B	Current industrial land which is vacant and suitable for occupation (5%)[27]		15.0	
C	Estimated total industrial land[28] (2015) (A+B)		299.7[29]	
			Growth Rate	
Forecast Provision		**Low**	**Central**	**High**
D	Land demand to 2036	45.2	59.9	76.1
E	Additional Demand for Waste and Recycling Facilities 2015-2036[30]		0.0	
F	Optimum frictional vacant land at 2036 (5% of A+D+E)	16.5	17.2	18.0
G	Excess vacant land: optimal levels of frictional land minus existing vacant industrial land (F-B)	1.5	2.2	3.0
H	Gross requirement for industrial land 2015-2036 (C+D+E+G)	346.4	361.8	378.8
Net requirement for industrial land 2015-2036 (H-C)		**46.7**	**62.1**	**79.1**

Source: AECOM. Note: figures may not sum due to rounding.

The implication of this analysis is that, over the forecast period, there is expected to be a deficit of industrial land in the region of between 46.7ha to 79.1ha, depending on the rate of growth. The

[27] This is the existing amount of industrial land with vacant premises and land associated with those premises. It does not include the quantum of industrial land that is vacant and developable.
[28] This figure differs from the land total set out in **Table 5-1** as these clusters include non-industrial land and land not currently in employment use e.g. greenfield sites.
[29] This consists of the following clusters: EMP S2; EMP S4; EMP S5; EMP S6; EMP S7; EMP S8; EMP B6; EMP B7; EMP B8; EMP B9; EMP D2; EMP R1; EMP R2 ; EMP R3; EMP R4; EMP R5; EMP R6; EMP R7; EMP R8; EMP R9; EMP G5; EMP G6; EMP G7; EMP G9; EMP G13; EMP G14; EMP G18; EMP G19; EMP G20; EMP G21; EMP G22; EMP G23; EMP G24; EMP G25; EMP G26; EMP G27.
[30] This to be determined through Waste Management Plan. Any land requirement in South Kesteven should be considered as additional to this requirement.

central case is that an additional 62.1ha of land will be required between 2015 and 2036 to support the growth in industrial activities, or the equivalent of 3ha per annum.

6.11 The Forecast for Office Floorspace to 2036

Table 6-8 presents the additional net requirement for office floorspace in South Kesteven, taking into account existing vacant and frictional floorspace requirements. Because of the mix of densities of office developed across the District, and the fact that offices are increasingly expected to be offered as part of mixed-use development, office space is initially represented in terms of floorspace (per sqm) below. This takes into account a frictional vacancy rate of 8%[31], the optimum level of surplus capacity in the market at any given time to allow an efficient churn of occupancy, and observed vacancy, which was observed to be broadly in line with this optimal rate.

Table 6-8 Office Floorspace Requirement (2015-2036)

Existing Provision			***Stock (sqm)***	
A	Current supply of occupied office floorspace (2015)		82,700	
B	Current vacant office floorspace (8%)		7,100	
C	Estimated stock of office floorspace (2015)24 (A+B)		89,300	
Forecast Provision			***Growth Rate***	
		Low	***Central Case***	***High***
D	Floorspace demand to 2036	20,700	23,300	25,900
E	Optimum frictional vacancy at 2036 (8% of A+D)	8,200	8,400	8,600
F	Surplus/deficit of vacant floorspace in 2036 (E-B)	1,100	1,300	1,500
G	Gross requirement for office floorspace 2015-2036 (C+D+F)	111,100	113,900	116,700
Net requirement for office floorspace 2015-2036 (G-C)		**21,800**	**24,600**	**27,400**

Source: AECOM. Note: figures may not sum due to rounding.

The implication of this analysis is that, over the forecast period, there is expected to be a requirement for an additional 19,500sqm to 27,400sqm of office floorspace, depending on the rate of growth. The central case is that 24,600sqm will be required between 2015 and 2036, the equivalent of 1,200sqm per annum.

6.12 Development Pipeline

Analysis of South Kesteven employment planning application data was carried out to establish the amount of development land across the District with planning permission but not yet implemented (up to April 2015). The analysis[32] shows that there is approximately 101,722sqm of floorspace with planning permission for employment use, 6,849sqm of floorspace with consent for change of use from employment use (B1, B2 and B8) to other uses, and therefore a net unimplemented consent figure of 94,873sqm for future employment. These are indicative figures and there was a degree of

[31] Para 3.7 of the GLA Land for Industry and Transport Supplementary Planning Guidance (SPG) (2012).
[32]AECOM calculated figures for unimplemented planning permission based on data from SKDC.

interpretation involved in the calculations. This does not include the 42ha of land east of the A1/South of Gorse Lane (KING 31), which has implemented planning permission.

These figures indicate a strong positive unimplemented development pipeline for employment land in the District which may contribute significantly towards the additional net requirement for both industrial land and office floorspace as set out above. The development pipeline informs the policy recommendations set out in **Chapter 6**.

6.13 Conclusions

We have carried out an assessment of the demand for office floorspace and industrial land within South Kesteven for the period 2015 to 2033. Our demand forecast considers the past relationship between workplace employment and floorspace, applying this dynamic relationship to employment projections to understand the likely additional demand for office floorspace and industrial land over this period. This forecast shows that there is a net additional requirement for both office floorspace and industrial land over the plan period. There is a need for between 46.7ha to 79.1ha of industrial land and 21,800sqm to 27,400sqm of office floorspace. The District’s ability to achieve the high growth rate is determined by the extent to which the Grantham Growth Point Status and Southern Relief Road may stimulate demand above historic trends.

Our analysis shows that a large proportion of the net additional land requirement for industrial/storage could be met through the permissions which have been consented but which have yet to be implemented.

7 Conclusions

7.1 Introduction

This section sets out conclusions and recommendations for the employment land review building on the outcomes of the supply and demand assessment.

7.2 Conclusions

Office Land Use (B1)

South Kesteven is predominantly an industrial district with a relatively small office market. There is approximately 83,000m^2 of gross office floorspace in the district, the majority of which is located in Grantham Town Centre. Our forecasting exercise estimates that there is additional demand for between 21,800m^2 and 27,400m^2 of office floorspace in the planning period to 2036 (see **Table 6.8**). The main conclusions on the office market are:

- The projected growth in office floors pace is mainly attributed to ongoing demand for space within Grantham Town Centre, and to a lesser extent demand from SMEs for smaller units across the District, including in Bourne, Stamford and Market Deeping.

- Market rents vary across the district and are priced according to quality of space. Office space can generate rent from £5per sq/ft for older space and up to £8-9 per sq/ft for new high quality space.

- Office demand has remained steady in South Kesteven with little growth in the market. The office market is estimated to grow in line with the future estimated population growth. Forecasts in Table 6.3 suggest that the office market in the Functional Economic Area will grow by 1.7% CAGR between 2015-2036.

- Currently Grantham has a low level of office vacancy. It is estimated that there will be a larger growth level at Grantham due to the growth agenda which will result in a significant increase in population[33], which in turn should boost the local office and employment market.

- Bourne, Market Deeping and Stamford are all in close proximity to Peterborough which has an impact on the employment market in the south of the district. This is evident by the large level (7,791) of out commuting towards Peterborough as suggested in **Figure 4-1**. Additional office stock may come forward in these locations with planned housing growth at Peterborough.

- Currently the office market is quite small but is expected to grow due to estimated population growth, better transport connections and a change in nature of employment within the district. This will in turn make the office market a more significant feature within the employment landscape of the district as evidenced in **Table 6-3** which estimates a higher CAGR growth in office space than for industrial.

[33]Including large urban extensions at the Southern Quadrant and the North East Quadrant.

The above points are supported by the SKDC Economic Development officer experience that there is evidence of some demand for office space in SKDC and a lack of suitable premises in the existing stock.

Industrial Land Use (B1c/B2/B8)

In employment land terms South Kesteven is predominantly an industrial district. The district benefits from excellent transport links due to the A1, A15, A52 and Grantham rail service on the East Coast Main Line. South Kesteven's hinterland is the most productive agricultural area in the UK and this generates demand for the food processing industries and logistics sectors which have a significant presence in the district. There is a total of approximately 1,085,000m^2 in industrial use in South Kesteven (see**Table 6.1**). The majority is in Grantham but there are also significant industrial areas in Bourne, Stamford and Market Deeping. There are several rural industrial estates, some of these significant such as Roseland Business Park (EMP R1), Gonerby Moor (EMP R3), Long Bennington (EMP R5) and King Street Industrial Estate (EMP R9).

As shown in **Table 6.12** the net additional demand over the planning period is between 47ha and 79ha of all employment land. A midpoint between the high and low scenarios is 62 ha. This does not take into account unimplemented planning permissions.

There are 93 hectares of vacant land within the existing employment clusters (including the planning permission at the KiNG 31 site) as well as a large supply of greenfield sites which are allocated or have potential for employment. Therefore the supply of employment land is sufficient in quantity to meet the projected demand over the Local Plan period.

7.3 Additional locations for growth in Grantham

The Grantham Capacity and Limits to Growth Study (2015) assesses all land around Grantham for potential for housing and or employment growth. The study indicates a number of potential locations for employment growth on the edge of the town, including sites to the south of Grantham which could take advantage of the relief road, a small site to the west of the A1 and sites around Gonerby Moor. These are shown in figures **5.1-5.3.**

The capacity study does not recommend that these sites are allocated, they are simply sites that have been assessed as suitable in land use terms for employment use. Decisions on which sites to be allocated should be based on the balance of supply and demand in the district and the wider economic area.

7.4 Recommendations

The employment land use strategy recommendations are presented below. The recommendation is presented first followed by supporting text setting out the rationale. Please note that this is one of a number of evidence base documents the Council will be considering that will feed into and inform its Local Plan evidence base. These are AECOM's independent recommendations and the Council will subsequently consider these before drafting its own Local Plan policies.

B1 Offices

R1 The demand assessment estimates a net additional demand for between 21,800 and 27,400 sqm of land for office space (B1) in South Kesteven over the Local Plan period to 2036[34]. The most suitable location in the district to accommodate this forecast demand is Grantham and limited amounts in Bourne, Stamford and Market Deeping. Also, a significant proportion of the demand can be met in new business parks within Greenfield sites. These include the following clusters:

Table 7-1: Suitable clusters to accommodate B1 use

AECOM Cluster No.	*Employment Area/ Name of Cluster*
EMP G2	Southern Quadrant
EMP B1	Bourne
EMP B3	Bourne
EMP S3	Stamford West
EMP D2	Market Deeping

Justification

The most appropriate location for the provision of B1 uses is Grantham. With the development of the Southern Relief road and the Southern Quadrant in Grantham, the majority of the office based demand in the district should be provided in EMP cluster G2 (Southern Quadrant) as well as well functioning sites with existing B1 designations. Other small pockets of B1 office use can be provided in mixed use sites in the market towns of Bourne, Stamford and Market Deeping.

Designated employment areas for B1, B2 and B8 Office, Industrial, and Storage and Distribution

R2 There is a continuing demand for employment floor space and land in the District, although overall demand for B2 employment space is declining as a result of a contraction in manufacturing sector. To ensure there is sufficient capacity to meet ongoing demand for employment land the existing well functioning occupied employment areas within the District should continue to be protected through designation in the Local Plan. The sites that are not currently designated, i.e. those in Grantham, should be designated as Existing Employment Areas or a similar designation. This will ensure adequate protection for these

[34] This figure has not been translated into a land requirement in hectares as it would be inaccurate to apply a generic plot ratio to office floorspace in different locations, e.g. business parks, town centres or above shops.

uses and create greater certainty for landowners, investors and developers. The existing employment areas would be suitable to accommodate all B Use Classes.

It is recommended that the following clusters continue to be protected either through continued designation or a new designation:

Table 7-2: Recommended clusters for continued protection

AECOM Cluster No.	*Employment Area/ Site Location/ Name of Cluster*	*South Kesteven Local Planning Policy Designation*[35]	*Employment Cluster Area (ha)*	*Vacant Land (ha)*
EMP S2	Land south of Uffington Road, Stamford	STM2b [SAP]	2	2
EMP S4	Land east of Ryhall Road, Stamford	STM2d [SAP]	4.18	2.1
EMPS5	Gwash Way, East of Ryhall Road, Stamford	ExE S1 [SAP]	2.8	0.0
EMP S6	East of Ryhall Road, Stamford	ExE S2 [SAP]	4.1	0.0
EMP S7	North of Uffington Road, Stamford	ExE S3 [SAP]	4.3	0.0
EMP S8	North of Barnack Road, Stamford	ExE S4 [SAP]	6.4	0.0
EMP B6	Pinfold Industrial Estate and adjacent area, Bourne	ExE B1 [SAP]	13.4	0.0
EMP B7	East of Cherry Holt Road, Bourne	ExE B2 [SAP]	9.1	0.0
EMP B8	West of Cherry Hold Road, Bourne	ExE B3 [SAP]	6.6	0.0
EMP B9	East of Cherry Holt Road, Bourne	ExE B4 [SAP]	18.4	0.0
EMP D3	Northfields Industrial Estate, Market Deeping	ExE D1 [SAP]	21.2	1.6
EMP R1	Roseland Business Park near Long Bennington	Roseland Business Park / Core Strategy Policy E1	7.1	0
EMP R3	Gonerby Moor, Grantham	ExE LSC1 [SAP]	45.4	9.1
EMP R4	Land adjacent to A1 Colsterworth	ExE LSC2 [SAP]	9.5	6.1
EMP R5	Long Bennington Business Park, Main Road, Long Bennington	ExE LSC3 [SAP]	2.8	0
EMP R6	White Leather Square, Billingborough	ExE LSC4 [SAP]	4.3	0.8
EMP R7	Burton Lane/High Dyke, Easton, Grantham	existing employment site	26.6	0
EMP R8	Honey Pot Lane, Colsterworth	existing employment site	10.2	0
EMP R9	King Street Industrial Estate, Langtoft	existing employment site	2.65	0

[35] STM = Stamford, B = Bourne, DE = Market Deeping, SAP = Site Allocations Policy, ExE = Existing Employment

AECOM Cluster No.	Employment Area/ Site Location/ Name of Cluster	South Kesteven Local Planning Policy Designation[35]	Employment Cluster Area (ha)	Vacant Land (ha)
EMP G5	Gonerby Hill Foot, Grantham	existing employment site	4.1	0.0
EMP G6	Gonerby Road, Grantham	existing employment site	7.9	0.0
EMP G8	Dysart Road, Grantham	existing employment site	0.7	0.0
EMP G9	North end of Trent Road, Grantham	existing employment site	2.1	0.0
EMP G10	Venture Way, Grantham	existing employment site	11.0	1.5
EMP G11	Swingbridge Road, Grantham	existing employment site	14.2	0.0
EMP G12	Harlaxton Road/Trent Road junction, Grantham	existing employment site	3.7	1.4
EMP G13	Springfield Park Industrial Estate, Grantham	existing employment site	7.7	0.0
EMP G14	Land at Springfield Road/ Harlaxton Road junction, Grantham	existing employment site	4.5	0.9
EMP G15	Land South of Earlesfield Lane, Grantham	existing employment site	5.6	0.0
EMP G16	Land North of Earlesfield Lane, Grantham	existing employment site	10.6	1.9
EMP G17	Land at junction of Dysart Road and Kempton Way, Grantham	existing employment site	7.1	0.7
EMP G18	Autumn Park Industrial Estate, Dysart Road, Grantham	existing employment site	4.6	0.0
EMP G19	North of Dysart Road/ west of Railway line, Grantham	existing employment site	4.1	0.0
EMP G20	Spittlegate Level, Grantham	existing employment site	15.8	0.0
EMP G21	London Road Industrial Estate, Grantham	existing employment site	3.2	0.7
EMP G22	Old School, Station Road, Grantham	existing employment site	0.4	0.0
EMP G24	Inner Street, Grantham	existing employment site	2.4	0.0
EMP G25	Belton Lane Industrial Estate, Grantham	existing employment site	2.0	0.0
EMP G26	Londonthorpe Lane, Grantham	existing employment site	5.1	0.0
EMP G27	Alma Park &Withabrook Park Industrial Estates, Grantham	existing employment site	35.1	0.8
EMP G28	Old Hampsons Site, Harlaxton Road, Grantham	existing employment site	0.8	0.0

It is recommended that the following sites are not allocated for employment use / de-designated for employment use:

AECOM Cluster No.	***Employment Area/ Site Location/ Name of Cluster***	***South Kesteven Local Planning Policy Designation***[36]	***Recommendation***	***Vacant Land (ha) (2)***
EMP B2	Land south of Tunnel Bank, Bourne	B1b [SAP]	Large greenfield site. No evidence of demand. De-designation recommended.	21.6
EMP B4	Land South of Spalding Road, Bourne	B1d [SAP]	Large unoccupied site allocated for employment on the periphery of Bourne. No evidence of demand. De-designation recommended.	8.2
EMP R2	Great Gonerby, North of Gonerby Moor	SAP 6 [SAP]	Small vacant site adjacent to existing employment at Gonerby Moor. No evidence of demand. De-designation recommended.	2.7
EMP G3	Land at junction of Harlaxton Road and Trent Road, Grantham	Allocated E1.11 [1995 Local Plan]	Small vacant greenfield site in the centre of Grantham. De-designation recommended.	2.1
EMP G4	Gonerby Moor, Grantham	SAP 6 [SAP]	No demand for industrial use at the site in the immediate or medium term as demonstrated by two- five years of marketing. De-designation recommended.	-
EMP G23	Aveling Barford Site, Grantham	Existing employment area / CS Policy E1	Low survey score. Partly cleared. Poor access and not in an employment location. De-designation recommended.	6.3

Justification

Planning Practice Guidance (DCLG) states that Councils should identify a future supply of land which is suitable, available and achievable for economic development uses over the plan period[37]..

There is a continuing strong demand for existing occupied employment land and to meet demand there should be continued protection of key sites to meet this demand. There should also be continued protection of other employment sites, including greenfield sites in accessible locations, to allow for churn and to provide a choice for businesses.

Demand from new or growing businesses should be directed to the most appropriate vacant sites. This will depend on where the market is and demand is strongest. A significant proportion is likely to be in Grantham because of the good quality sites and strong transport links.

However, there is a surplus of vacant developable and greenfield land to meet demand, and therefore it is recommended that a small number of employment sites which are currently vacant, which have not performed strongly on the assessment and for which our research shows there is a lack of demand, should be considered for release from an employment designation.

[36] STM = Stamford, ExE = Existing Employment, B = Bourne, DE = Market Deeping, SAP = Site Allocations Policy
[37] NPPG paragraph 001 Reference ID: 3-001-20140306

There is no evidence to suggest the demand is there to support further allocation of greenfield sites for employment use. This includes sites identified as potentially suitable for employment use in the Grantham Capacity and Limits to Growth study.

R3 – Use of vacant land to accommodate demand

There is a projected net demand for approximately 62 hectares of employment land over the Local Plan period, in addition to the land in existing employment use, not taking into account unimplemented consent for employment use. Based on our assessment, the vacant sites contained within the existing employment areas are the most sustainable locations to meet the majority of the future demand.

These sites are set out in Table 6.11 of the report but exclude sites recommended for de-designation in R2 above:

Employment Cluster Number and Name	***Type of Vacant Land***	***Size (ha)***	***Town***
EMP D3	Development site	1.6	Market Deeping
EMP G1	Development site	32.0	Grantham
EMP G10	Development site	1.5	Grantham
EMP G12	Development site	1.4	Grantham
EMP G14	Development site	0.9	Grantham
EMP G16	Development site	1.9	Grantham
EMP G17	Development site	0.7	Grantham
EMP G21	Development site	0.7	Grantham
EMP G27	Development site	0.8	Grantham
EMP R3	Development site	9.1	Grantham
EMP R4	Development site	6.1	Colsterworth
EMP R6	Development site	0.8	Billingborough
EMPS2	Development site	1.6	Stamford
EMP S4	Development site	3	Stamford

Justification

There is a positive net additional demand for employment land over the plan period. The vacant land within existing employment clusters is the most appropriate location to meet this demand because use can be made of existing infrastructure or new infrastructure capacity can be provided more easily, the sites do not pose ‘bad neighbour’ issues and there is generally good access to the Strategic Road Network.

Greenfield sites

R4 Based on the net additional demand, the vacant industrial land and land with planning permission is sufficient to accommodate demand. However, it is expected that some greenfield land will be necessary to offer a choice in the market, and to take account of constraints such as landownership and the deliverability of sites within existing clusters.

We recommend that the following greenfield sites are allocated or continue to be designated for employment use.

Employment Cluster Number	*Cluster name*	*Recommendation*	*Size (ha)*
EMP D1	Extension to Northfields Industrial Estate, Market Deeping	Road junction in place to allow for expansion of estate	12.3
EMP D2	Spitfire Way, Market Deeping	Retain as mixed use site	6
EMP B1	Land north of Manning road and west of Meadow Drove, Bourne	Retain as infill development site, two strategic access points and will help further develop B6 cluster site, could be used as mixed use development.	15.7
EMPB3	Land South of West Road and north of Elsea Park, Bourne	Retain. Business park as part of Elsea Park development.	2.92
EMP B5	Land North of Bourne Eau and east of Carr Dyke, Bourne	Retain as infill development, unsuitable for other uses due to location. Industrial employment surrounding the site on all boundaries and canal to the south.	3.7
EMP G1	Land east of A1 south of Gorse Lane, Grantham (KING 31)	Planning permission	31.9
EMP G2	Land between A52 Somerby Hill and Spitalgate Level south of Grantham, Southern Quadrant	Retain, Southern Quadrant has a strategic location and planned for through adopted Core Strategy. The area is primed for growth due to the development of the southern relief road	45.9
EMP S3	Land adjacent to A1 off Empingham Road, Stamford	Currently allocated as a mixed use site in the SSA (2014), located on the west of Stamford.	14

We recommend that the following greenfield sites are not allocated or are de-designated for employment use.

Employment Cluster Number	*Cluster name*	*Recommendation*	*Size (ha)*
EMP G3	Land at junction of Harlaxton Road and Trent Road, Grantham	Small greenfield site in the centre of Grantham, release to other uses	2.1
EMP G4	Gonerby Moor, Grantham	Release - no effective demand for industrial use at the site in the immediate or medium term as demonstrated by two- five years of unsuccessful marketing	105.5
EMP B4	Land South of Spalding Road, Bourne	Release, large greenfield site allocated as employment site on the periphery of Bourne. No estimated demand	8.2
EMP R4	Land adjacent to A1 Colsterworth	Release, Colstworth lorry depot, site works have commenced on ground however there appears to be little demand in this area and this was noted during market consultation	6.1
Total			**142.4**

Justification

The net additional demand can be met through the vacant sites within existing employment areas and through the new employment land coming forward through planned development such as the Southern Quadrant. Additional greenfield sites may be necessary to allow choice in the market and to take account of constraints such as landownership and deliverability. However, there is no evidence of demand for all the identified greenfield sites and therefore it is not necessary to allocate or maintain the designation of all greenfield sites.

R6 Site specific recommendations

- **G27 Alma Park Industrial Estate (35.9ha) - retain**
- **G4 Great Gonerby rail head (105.5ha)– release**
- **R3 Gonerby smaller sites (9.1ha)– release**

Justification

It is recommended that Alma Park Industrial Estate is retained as an employment location. During the market consultation with agents it was noted that there are low levels of vacancy, the site is operating to its potential and the location and rental rates are attractive to businesses. It comprises a large number of businesses, both large and small, and is in active use. This is supported by the findings of the viability review of Alma Park provided to South Kesteven District Council.

Great Gonerby rail head (Cluster G4), this large greenfield site is recommended for release from employment allocation as there is no evidence of demand for such a large level of industrial land in that location.

During market consultation it was noted that there is little or no demand for ‘large box’ B2 and B8 units in the Gonerby area. It was also noted that plots have been marketed in the cluster for between 2-5 years without any interest. It is therefore recommended that cluster R3 (Gonerby small sites) is released.

R7 Monitoring: The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the planned period, 2014 to 2031.

Justification

It is important that appropriate and sufficient monitoring mechanisms are embedded within the plan making process in order to record the change in employment land available for economic growth. The aim of the monitoring of employment land is to ensure that overall an approximate quantum of appropriate employment land supply is retained in the district to meet the level of projected demand indicated in this study.

Government guidance on undertaking and implementing employment land reviews through the planning system includes minimum recommended employment monitoring within the Local Plan and regular updates of the Housing and Economic Land Availability Assessment.

Commercial Property Agents Consultation

Property Market Agents Contacted:

- Richardsons
- Barker Storey Matthews
- Longstaff
- Hodgson Elkington
- Jones LangLasalle
- Savills
- King West
- Grantham Estates

Appendix A Employment clusters maps

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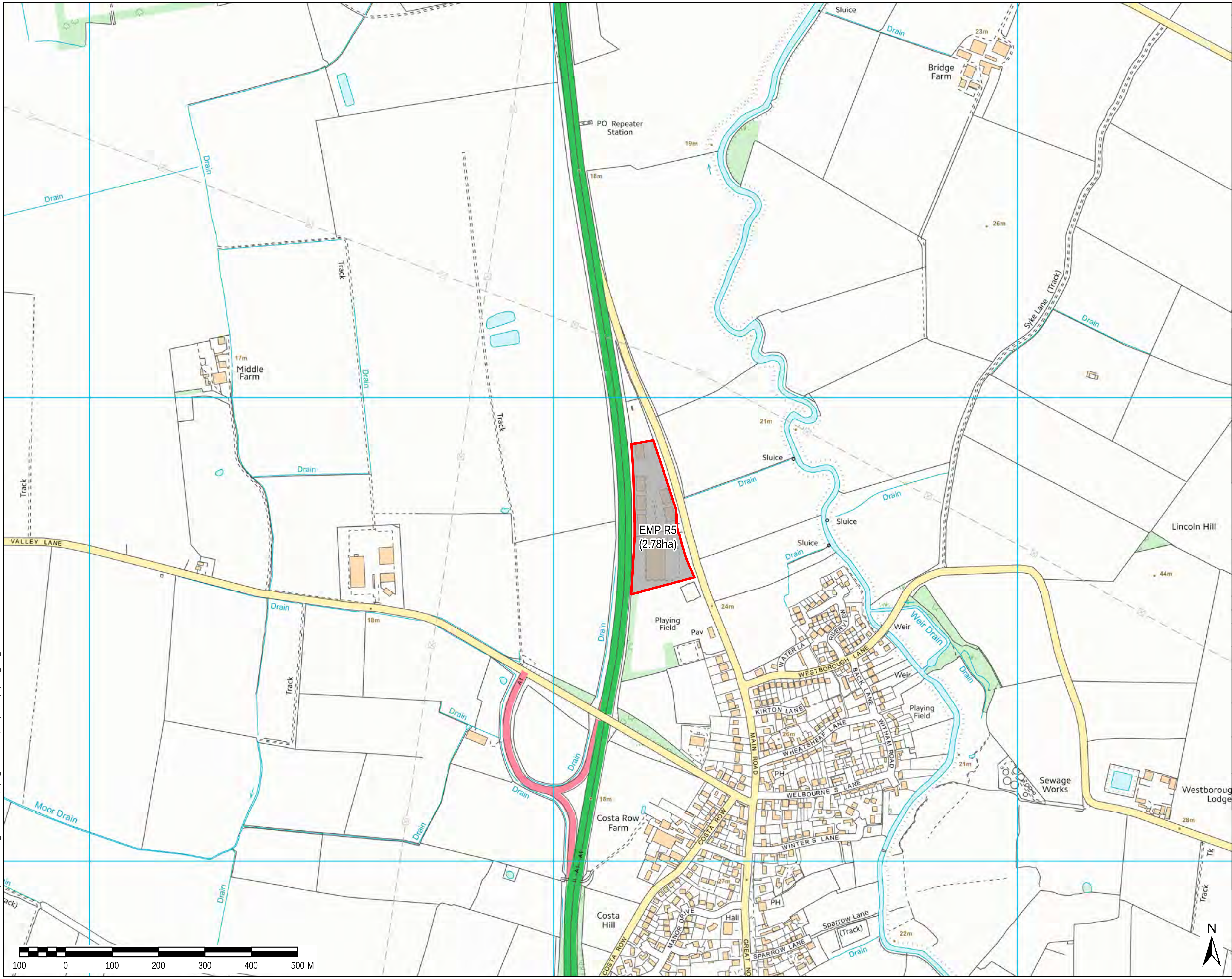

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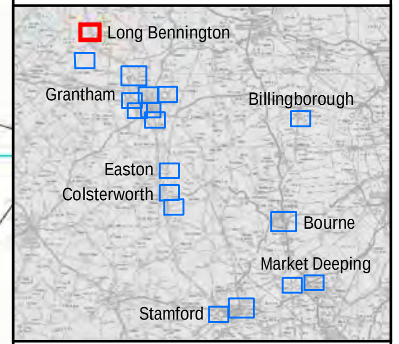
Cluster boundary

Existing employment land



Purpose of Issue

Client

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Project Title

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Drawing Title

EMPLOYMENT LAND

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FIGURE 1

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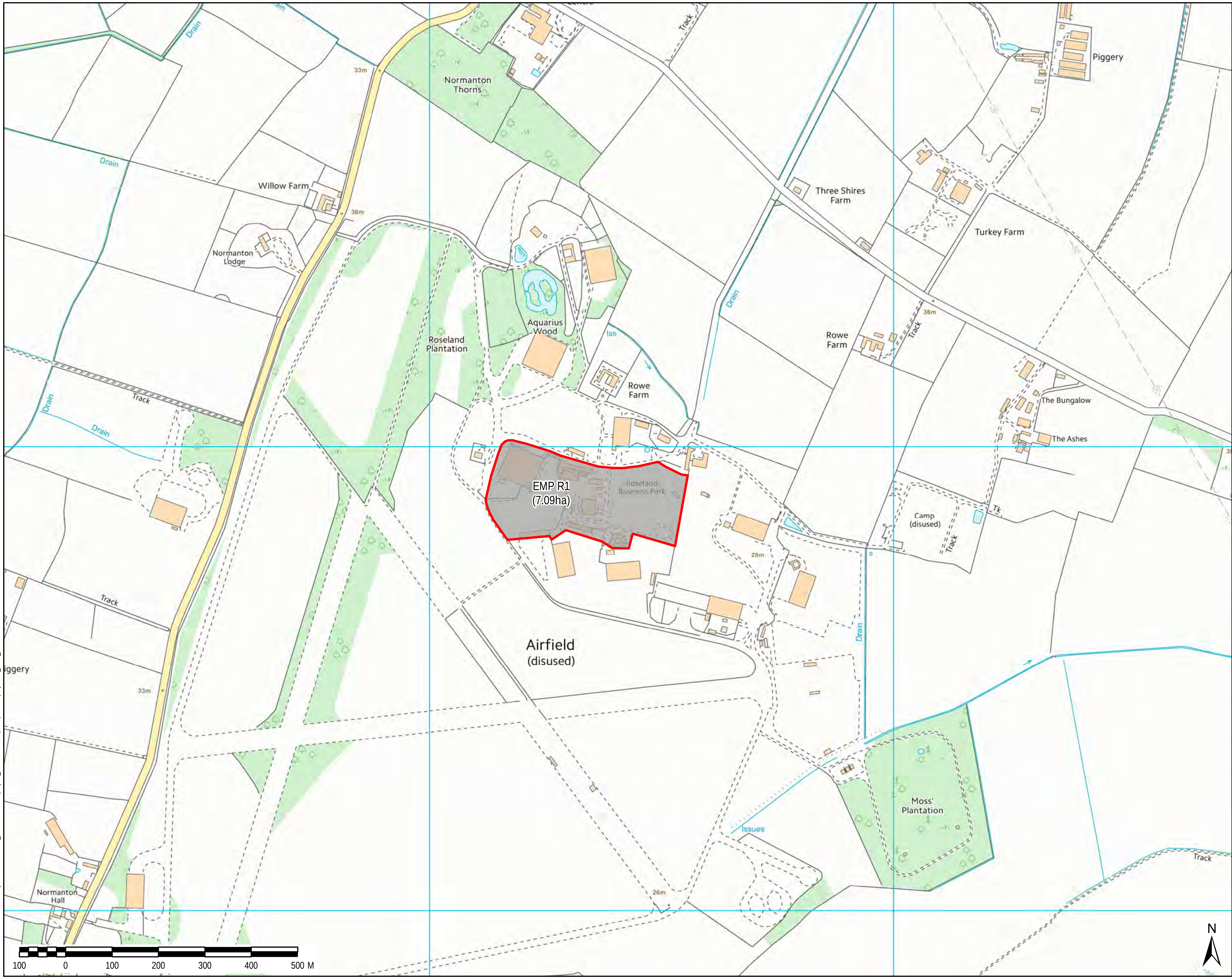

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LEGEND

Cluster boundary

Existing employment land

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FIGURE 2

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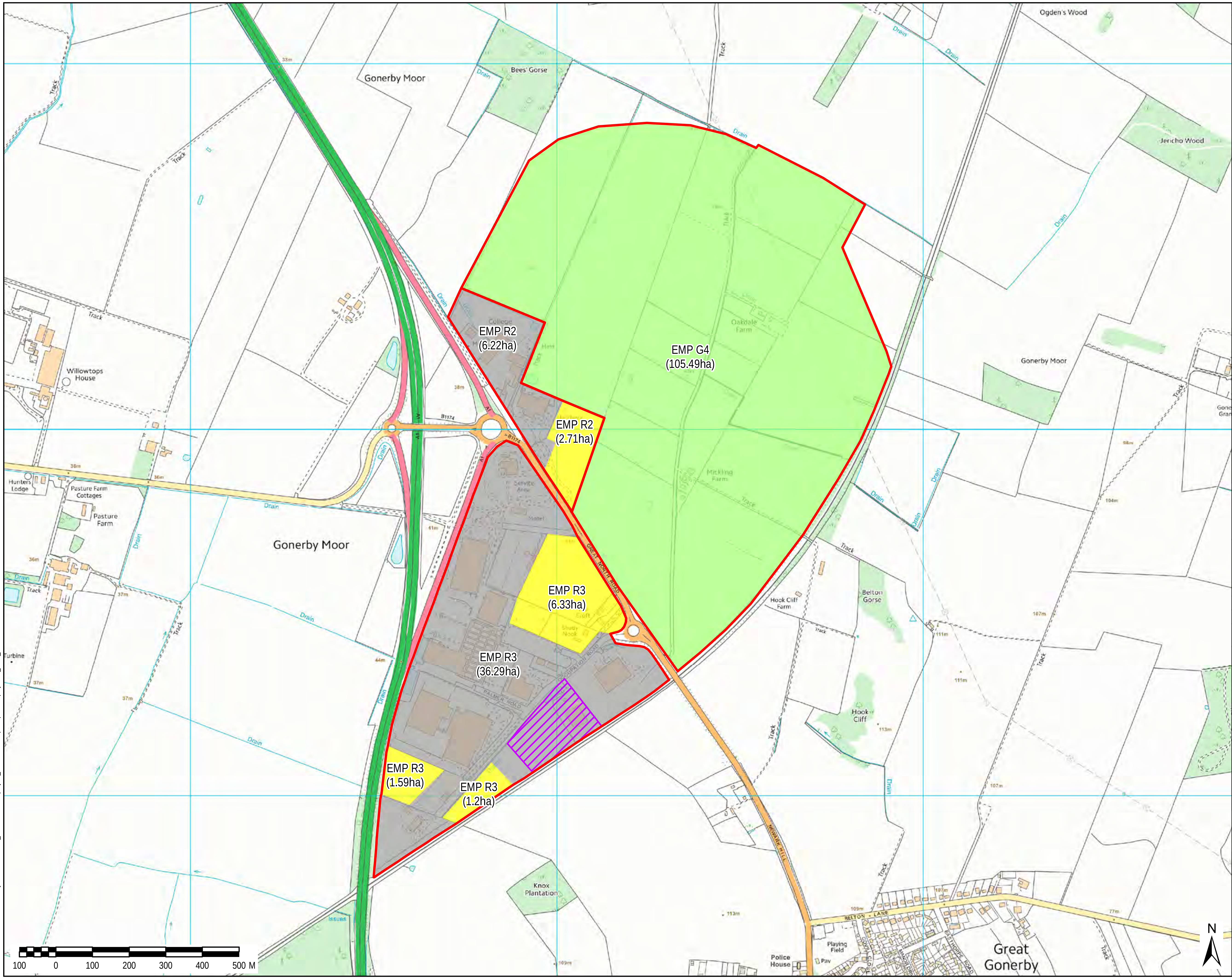
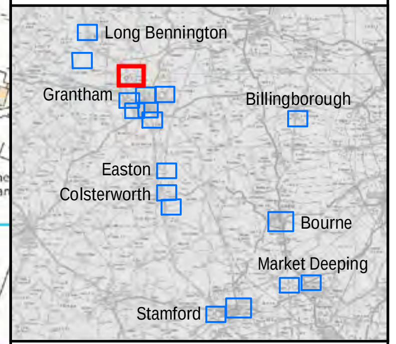


LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site
- Council recycling centre



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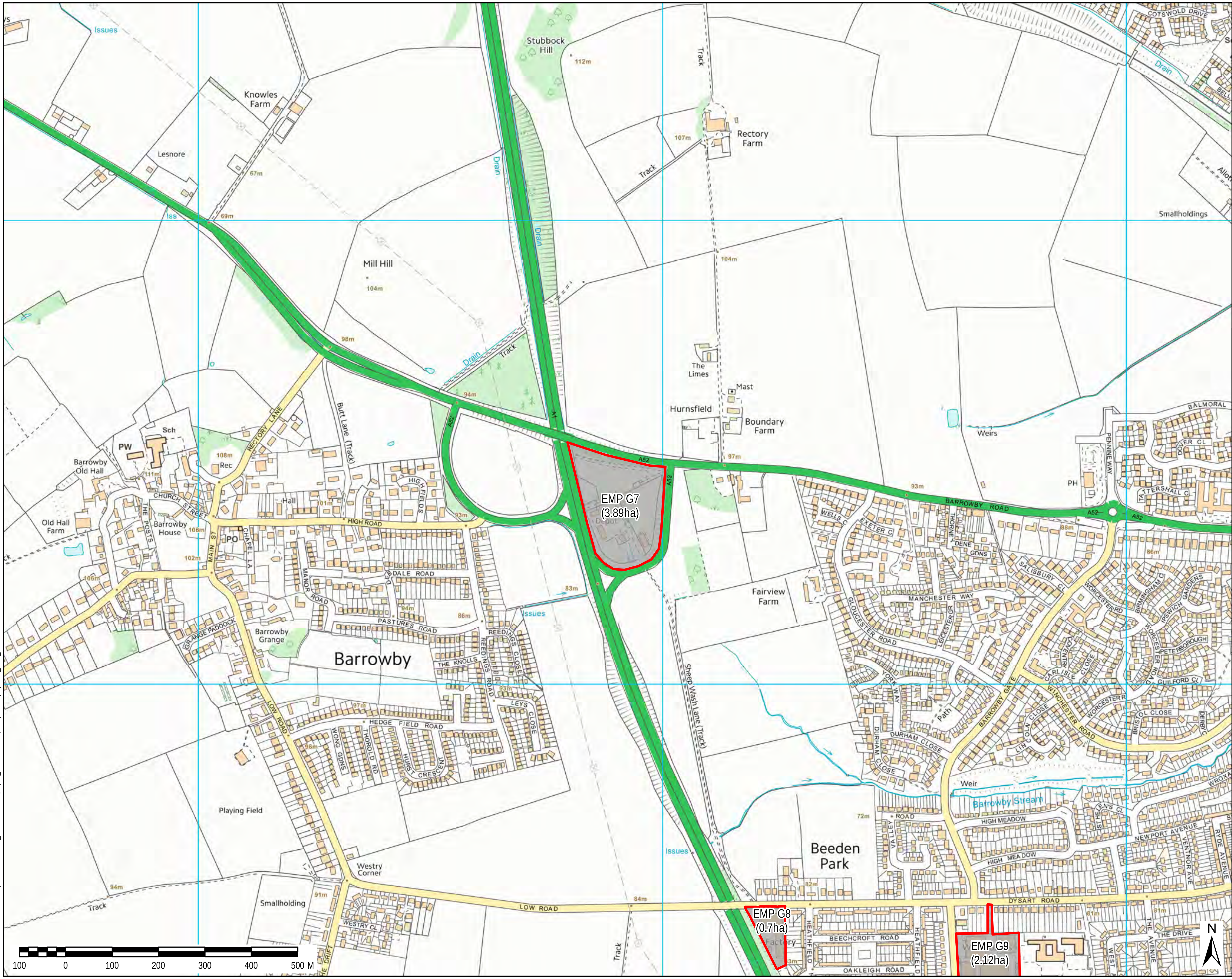

LEGEND

- Cluster boundary
- Existing employment land

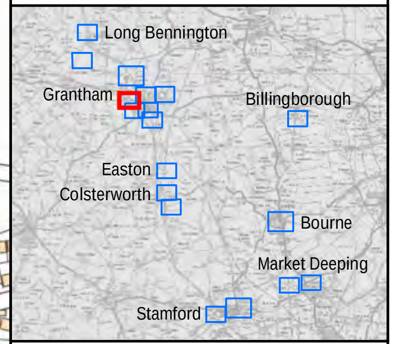

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FIGURE 4

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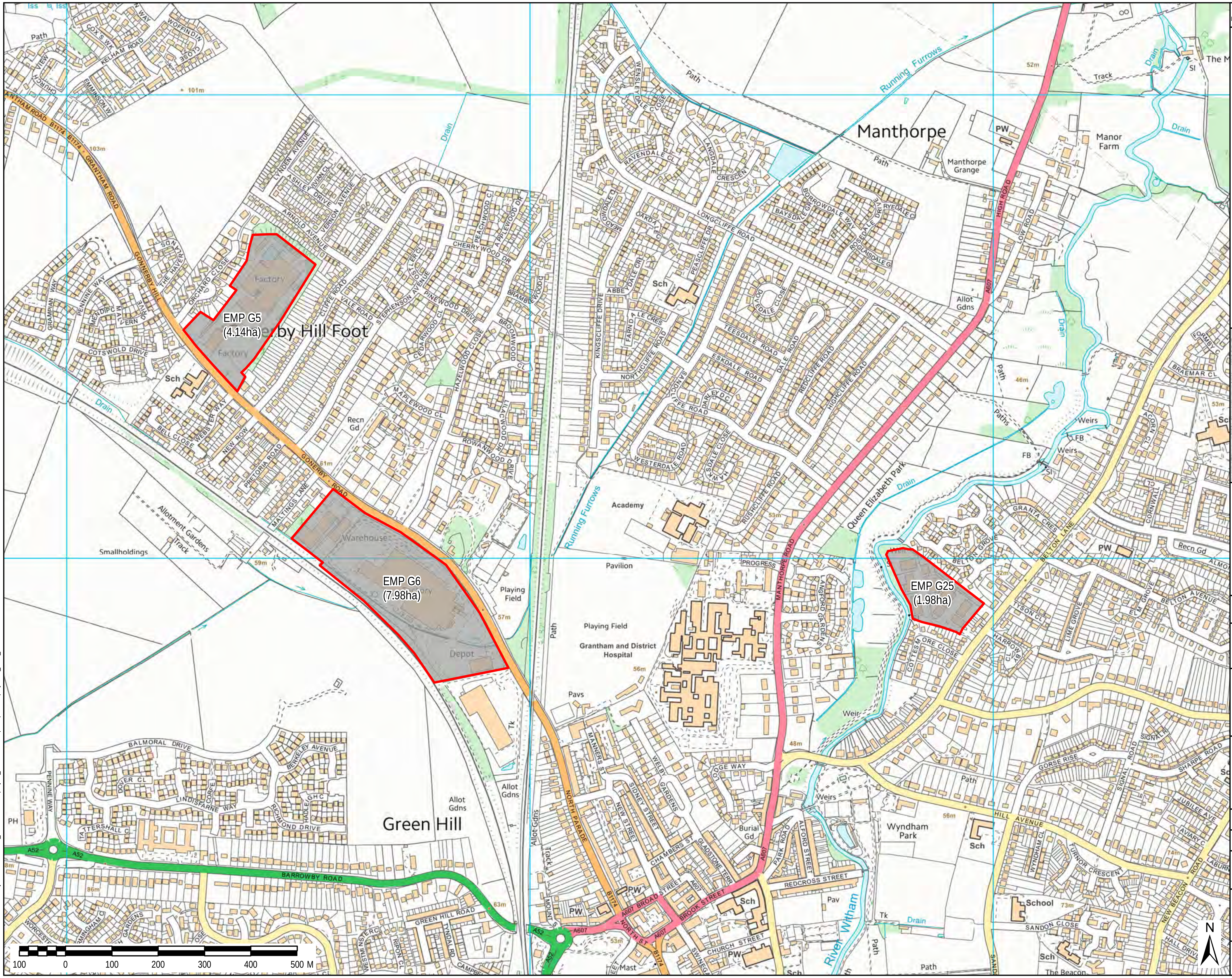
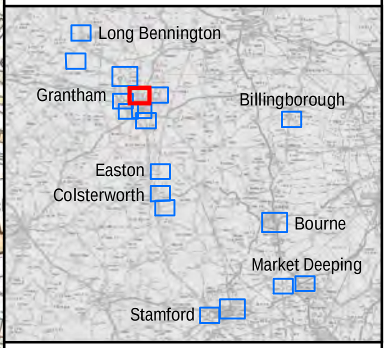


LEGEND

- Cluster boundary
- Existing employment land



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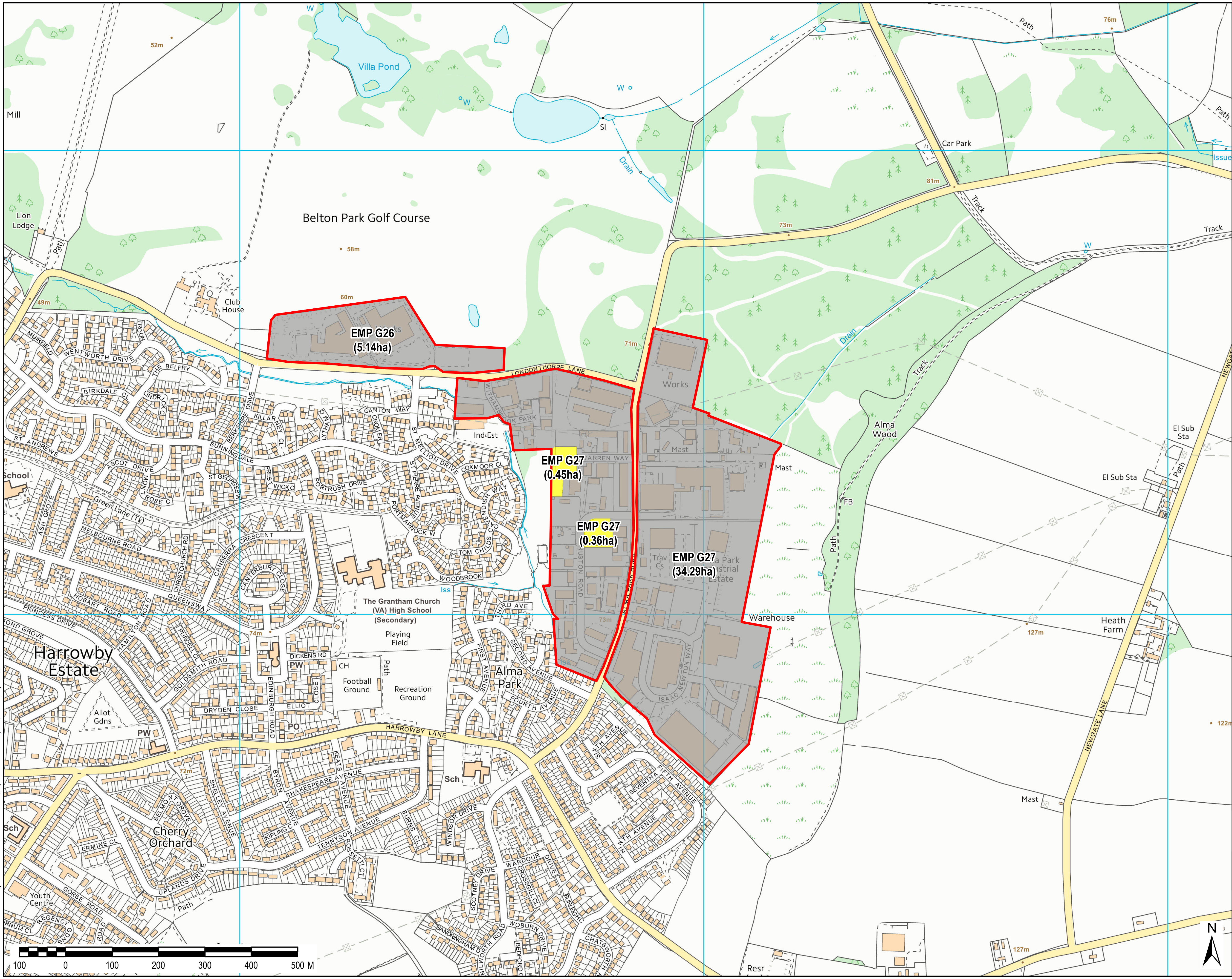

LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land

Long Bennington
Grantham
Billingborough
Easton
Colsterworth
Bourne
Market Deeping
Stamford

Purpose of Issue

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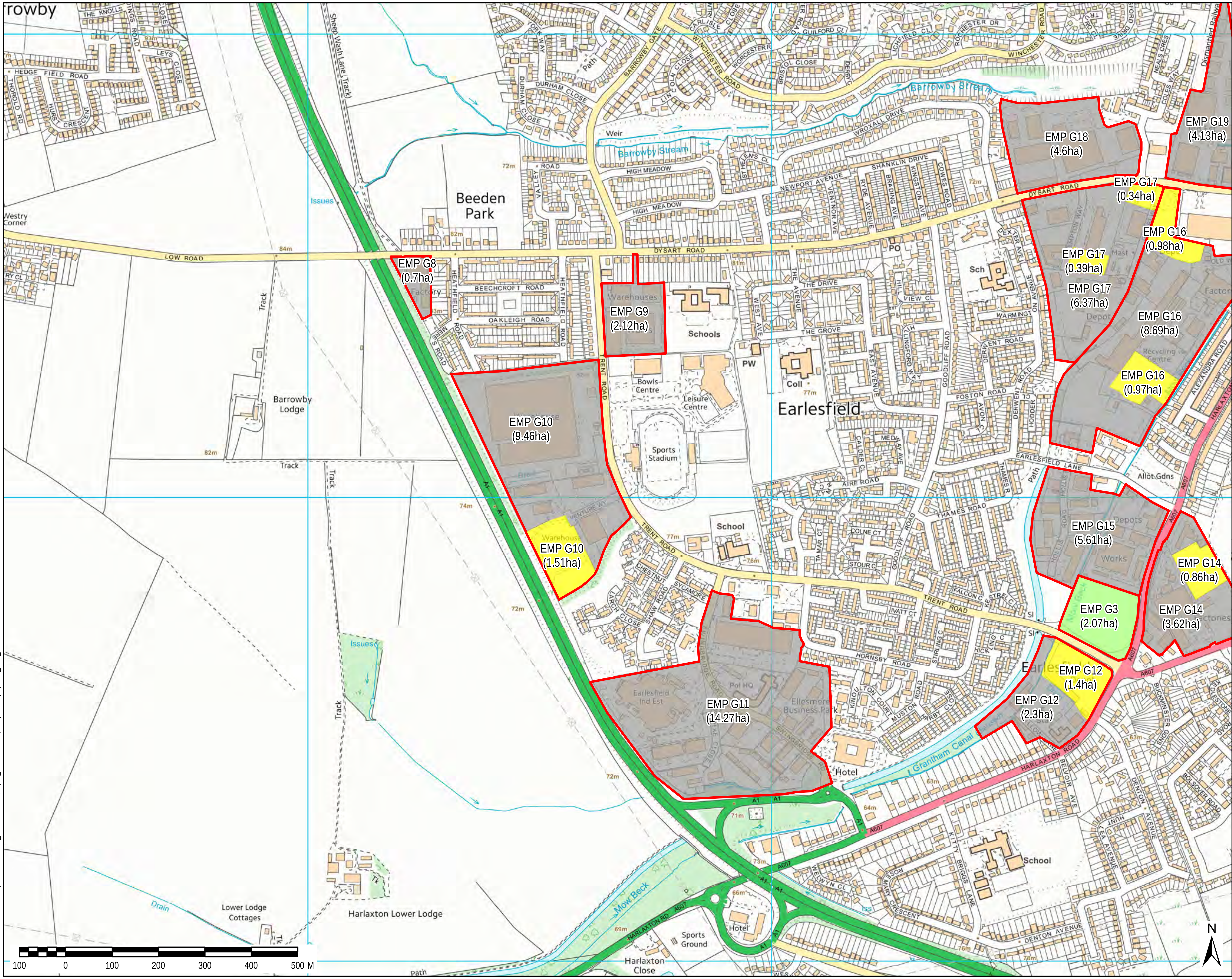

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LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site

Long Bennington, Grantham, Billingborough, Easton, Colsterworth, Bourne, Market Deeping, Stamford

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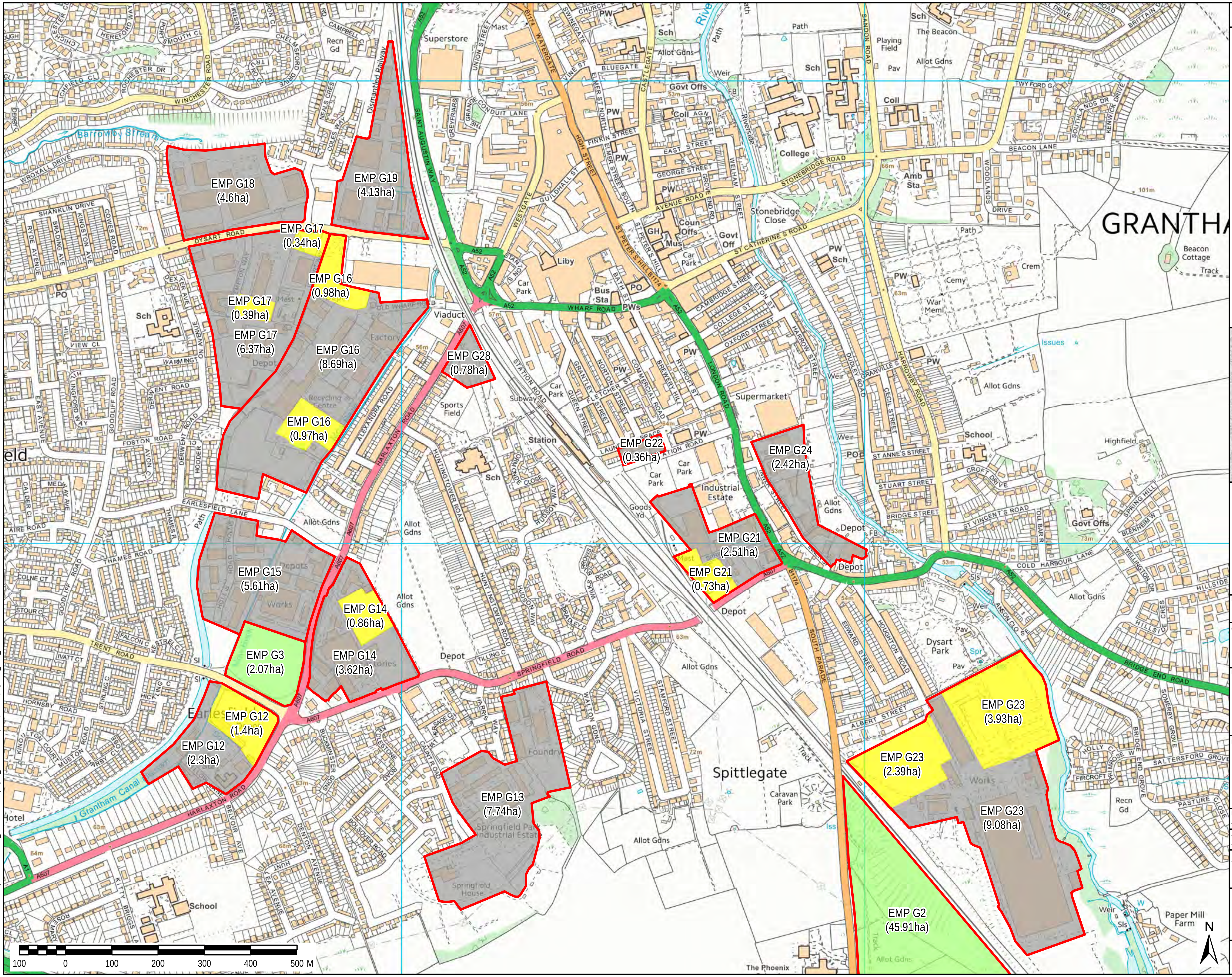

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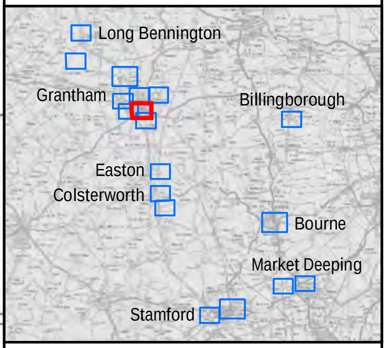
LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site



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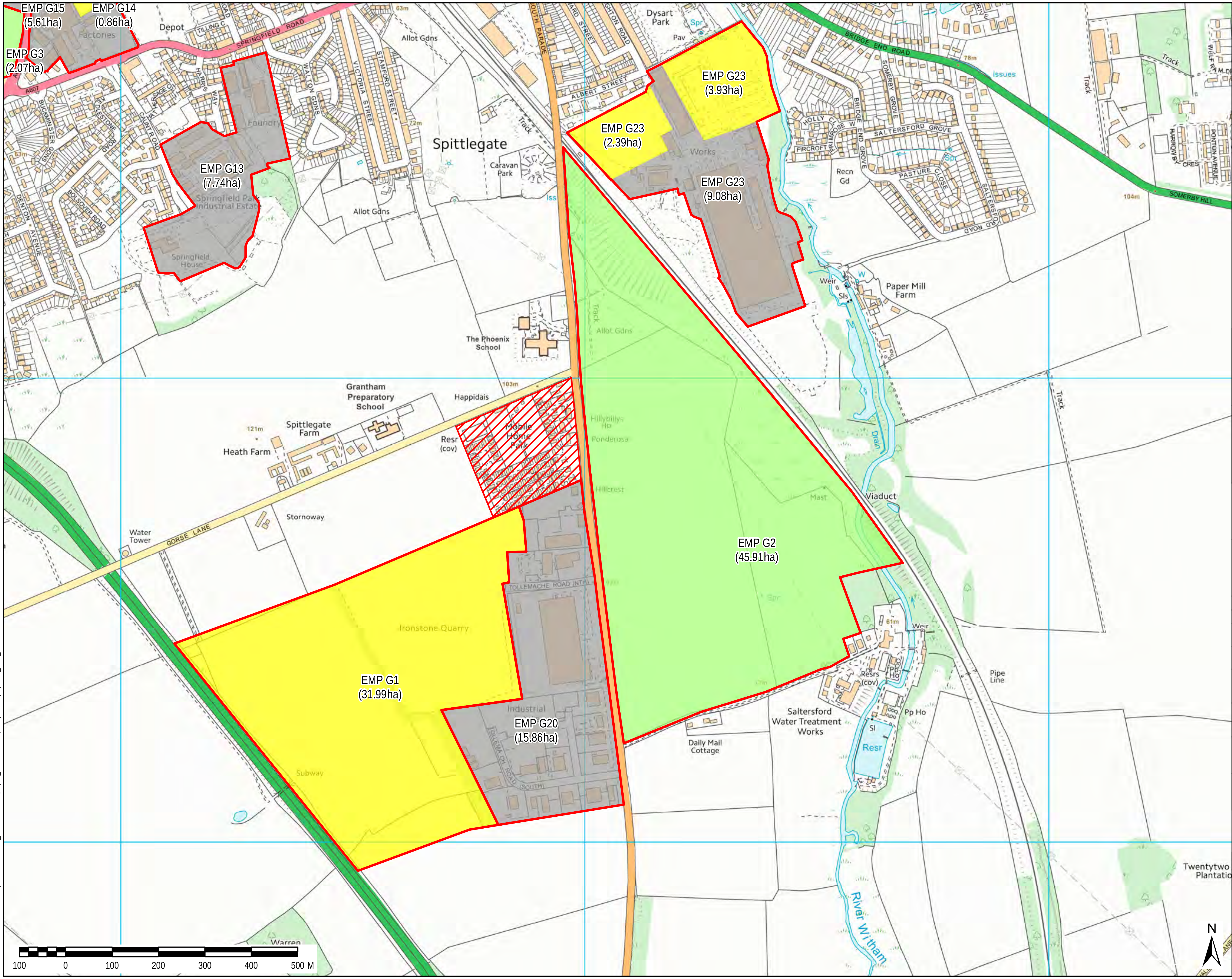

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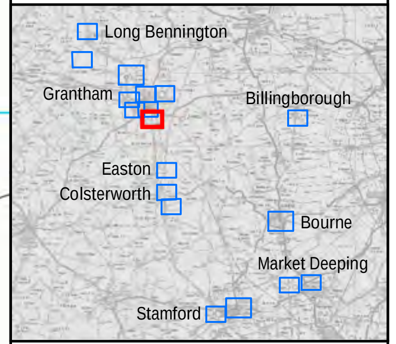
LEGEND
- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site
- Caravan park



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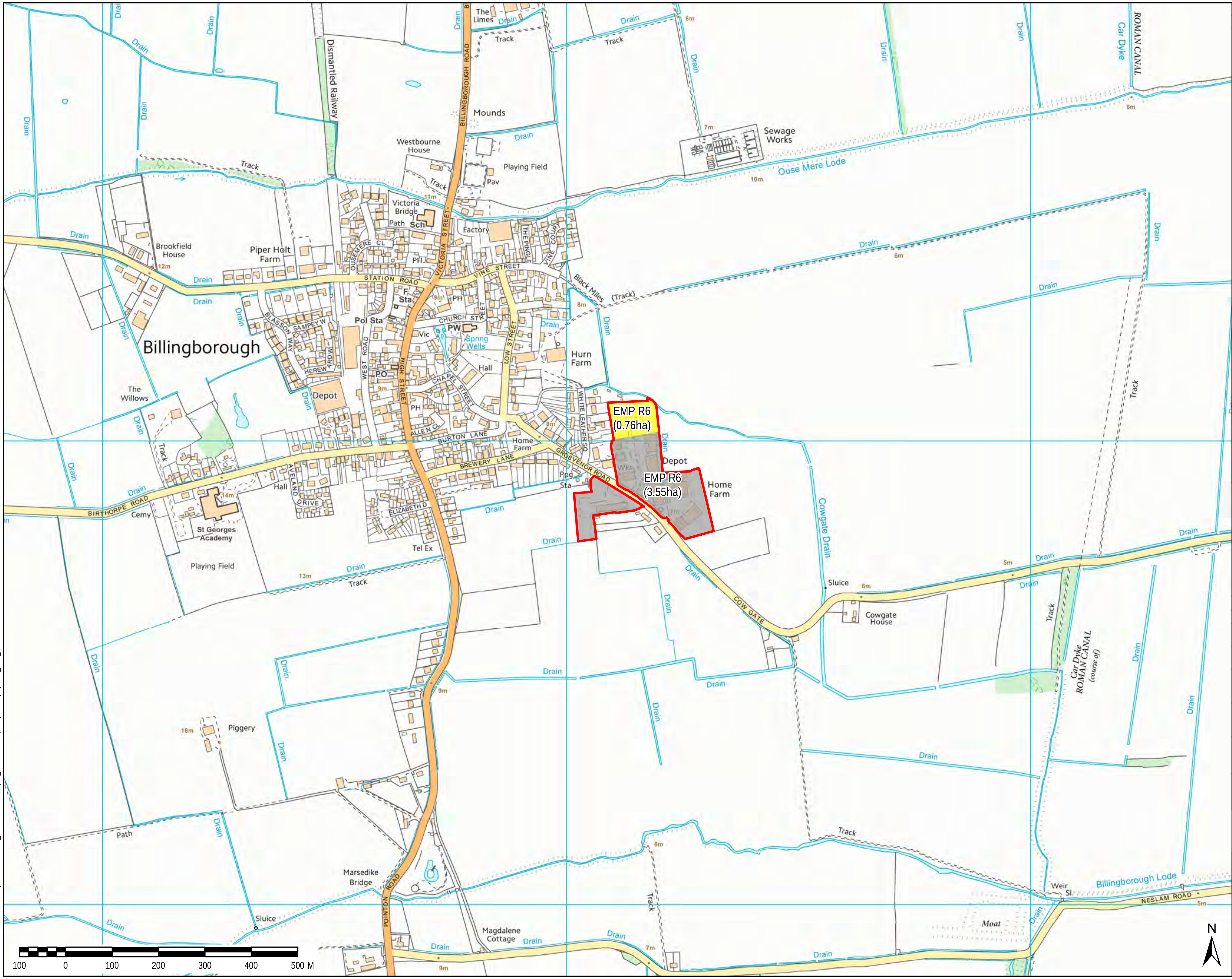

LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land

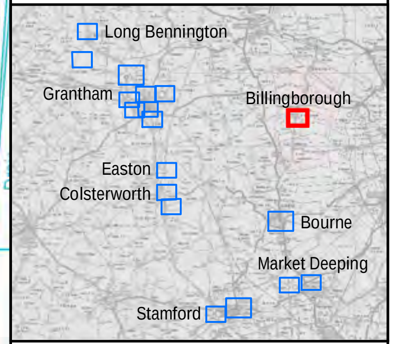

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FIGURE 10

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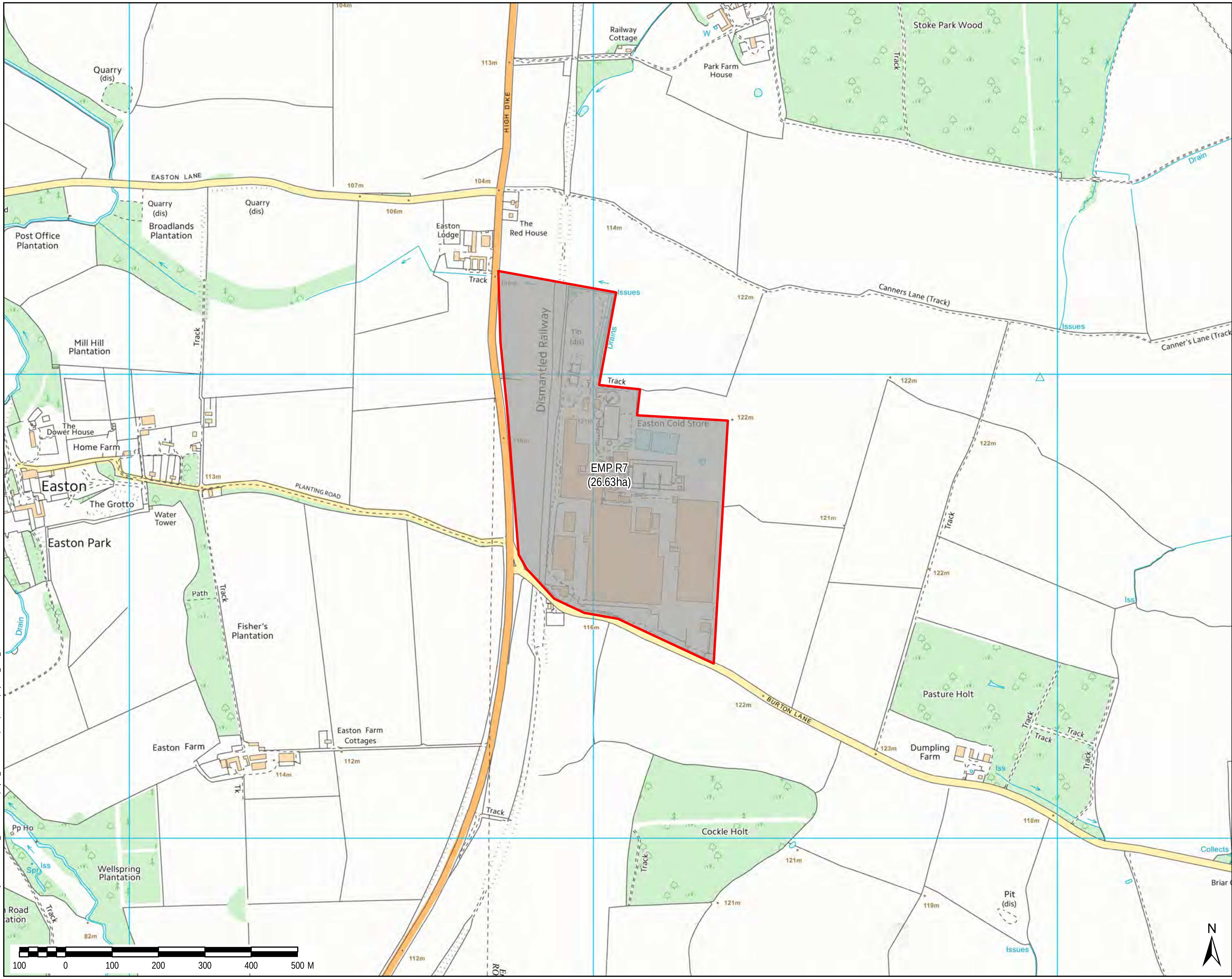

LEGEND

Cluster boundary

Existing employment land

Purpose of Issue

Client

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Project Title

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EMPLOYMENT LAND

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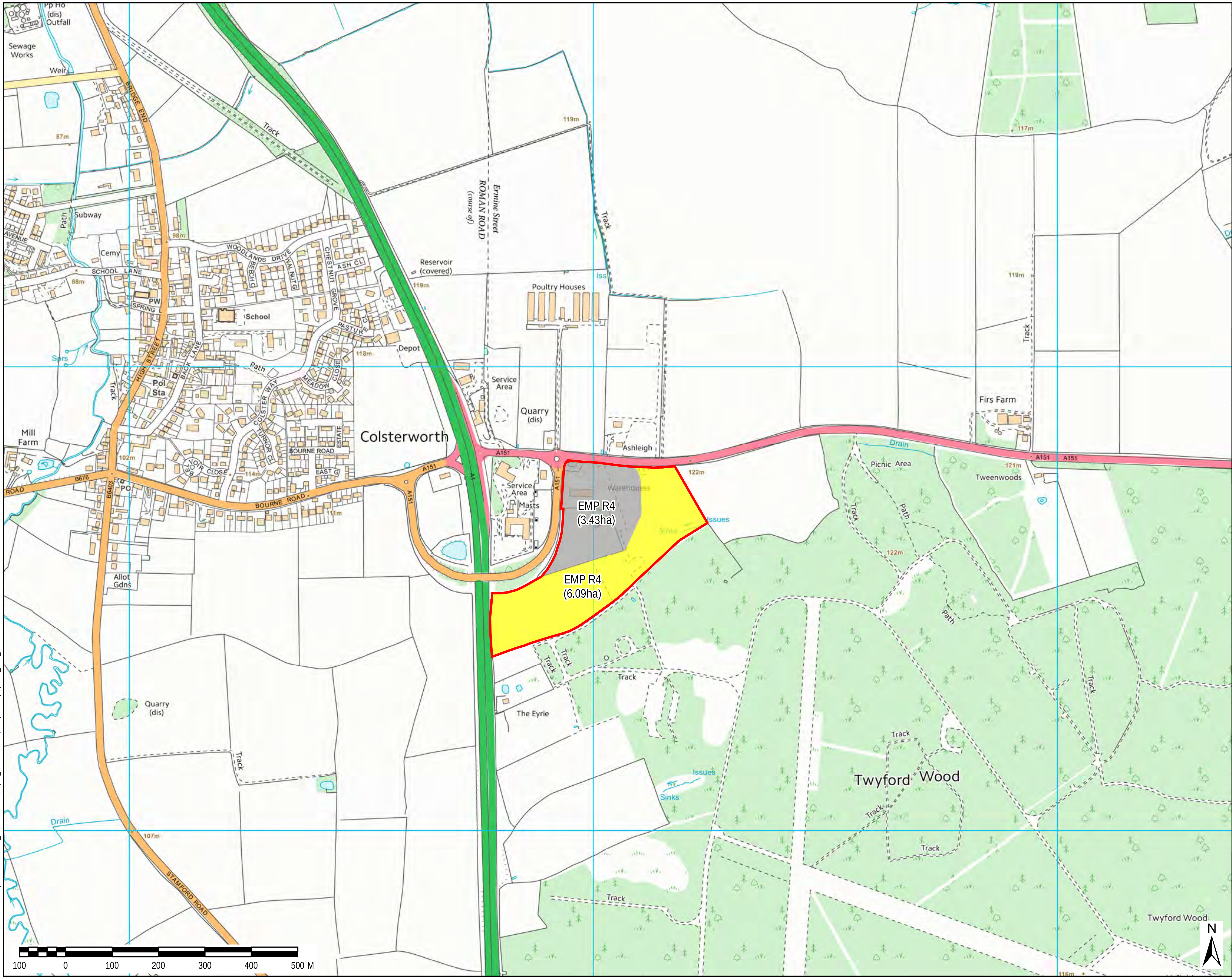

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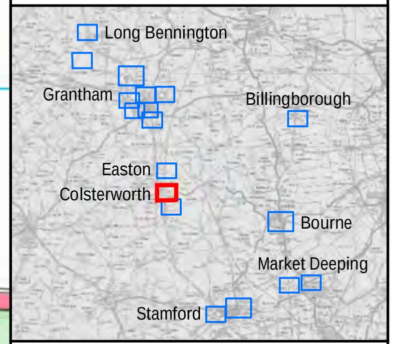
LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land



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Project Title
SOUTH KESTEVEN LOCAL PLAN

Drawing Title
EMPLOYMENT LAND

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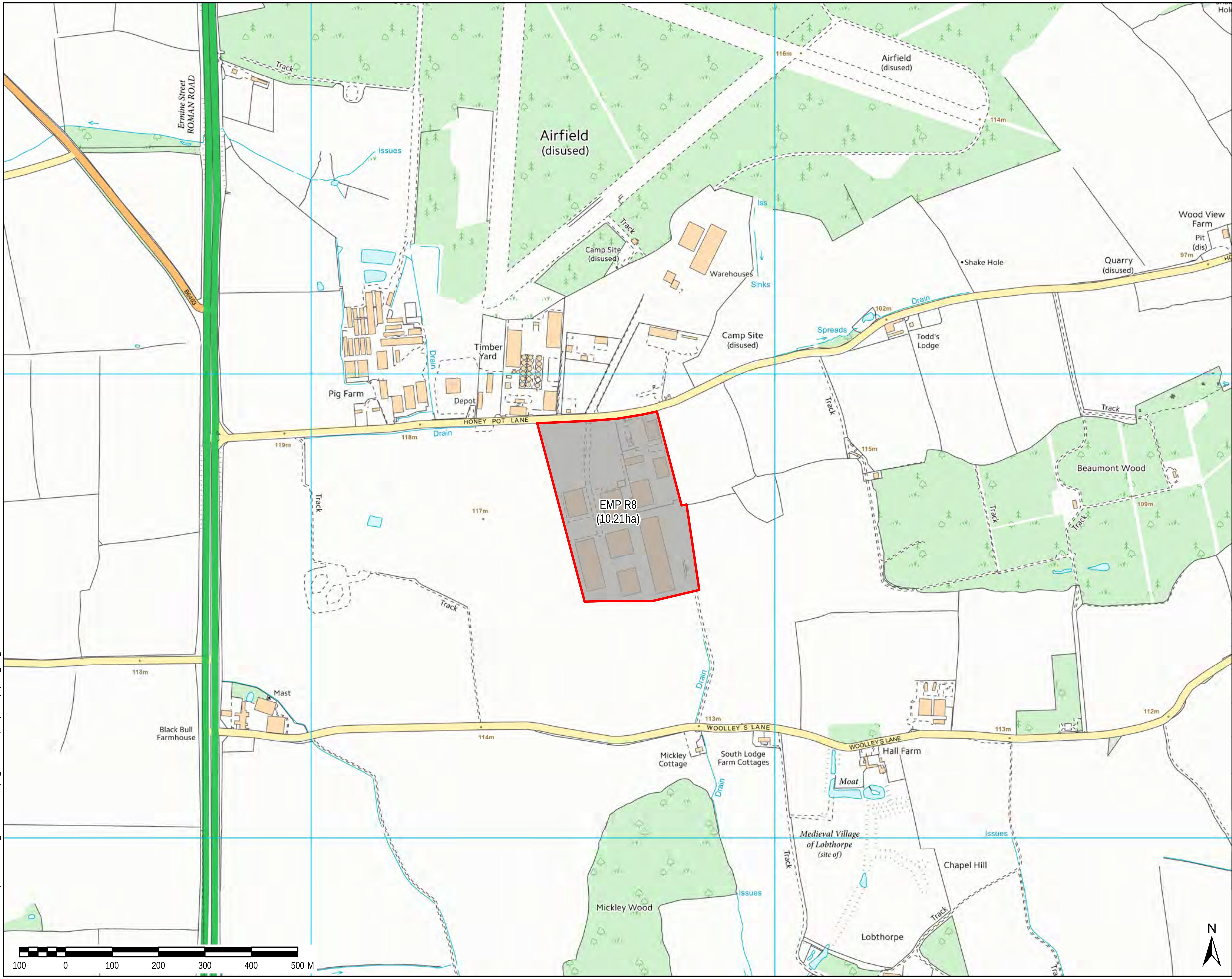

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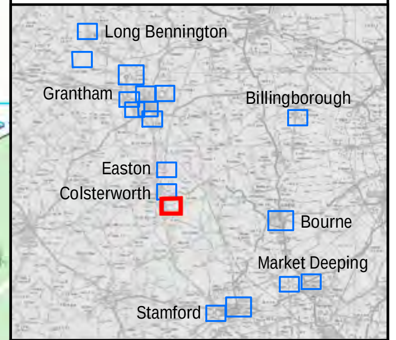
LEGEND

Cluster boundary

Existing employment land



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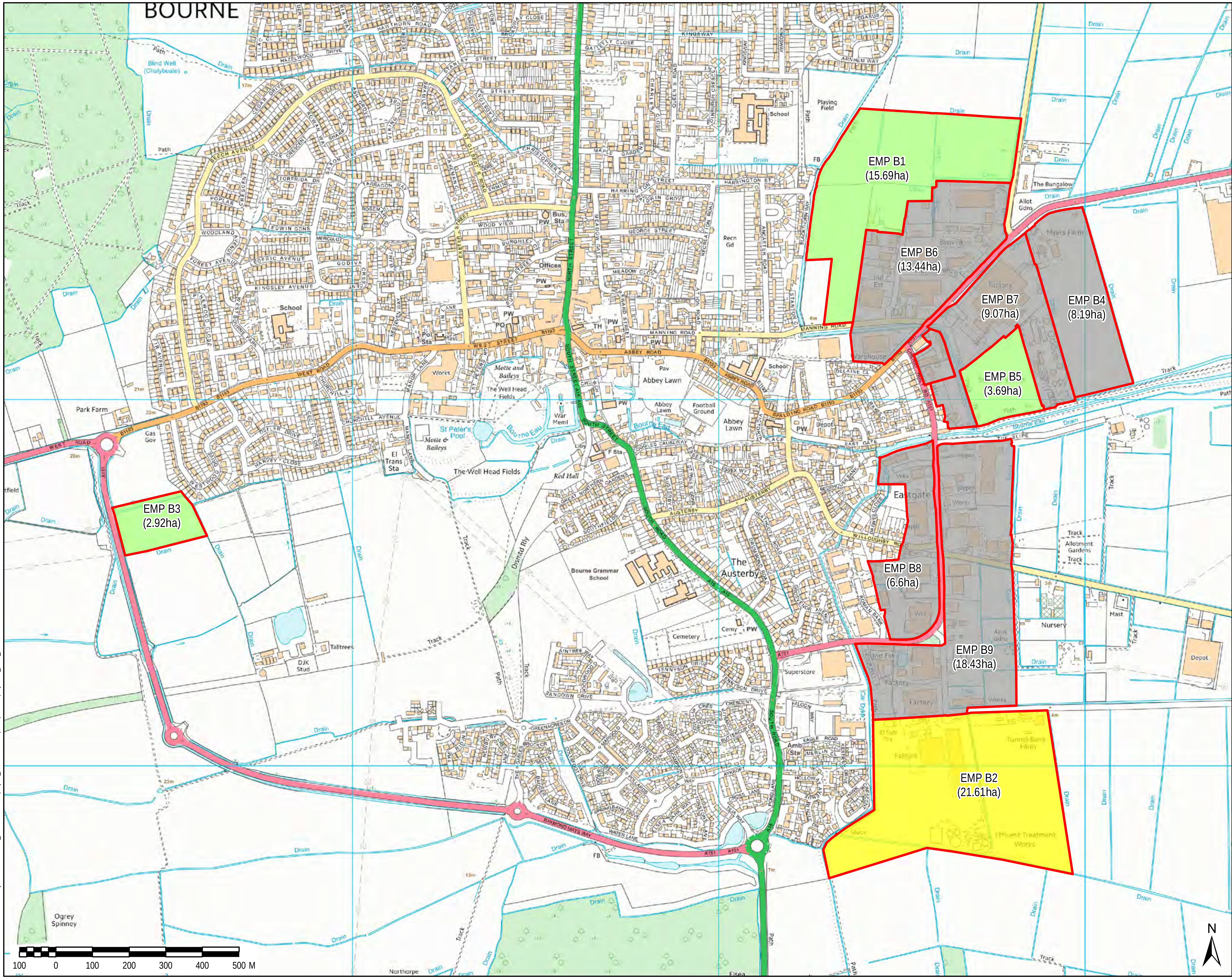
Drawing Number	Rev
FIGURE 13	



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LEGEND
- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site

Long Bennington
Grantham
Billingborough
Easton
Colsterworth
Bourne
Market Deeping
Stamford

Purpose of Issue

Client
SOUTH KESTEVEN DC

Project Title
SOUTH KESTEVEN LOCAL PLAN

Drawing Title
EMPLOYMENT LAND

Drawn	Checked	Approved	Date
JW	TC	TC	03/06/2015

AECOM Internal Project No.	Scale @ A3
47073432	1:9,500

AECOM
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Alençon Link, Basingstoke
Hampshire, RG21 7PP
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Drawing Number
FIGURE 14

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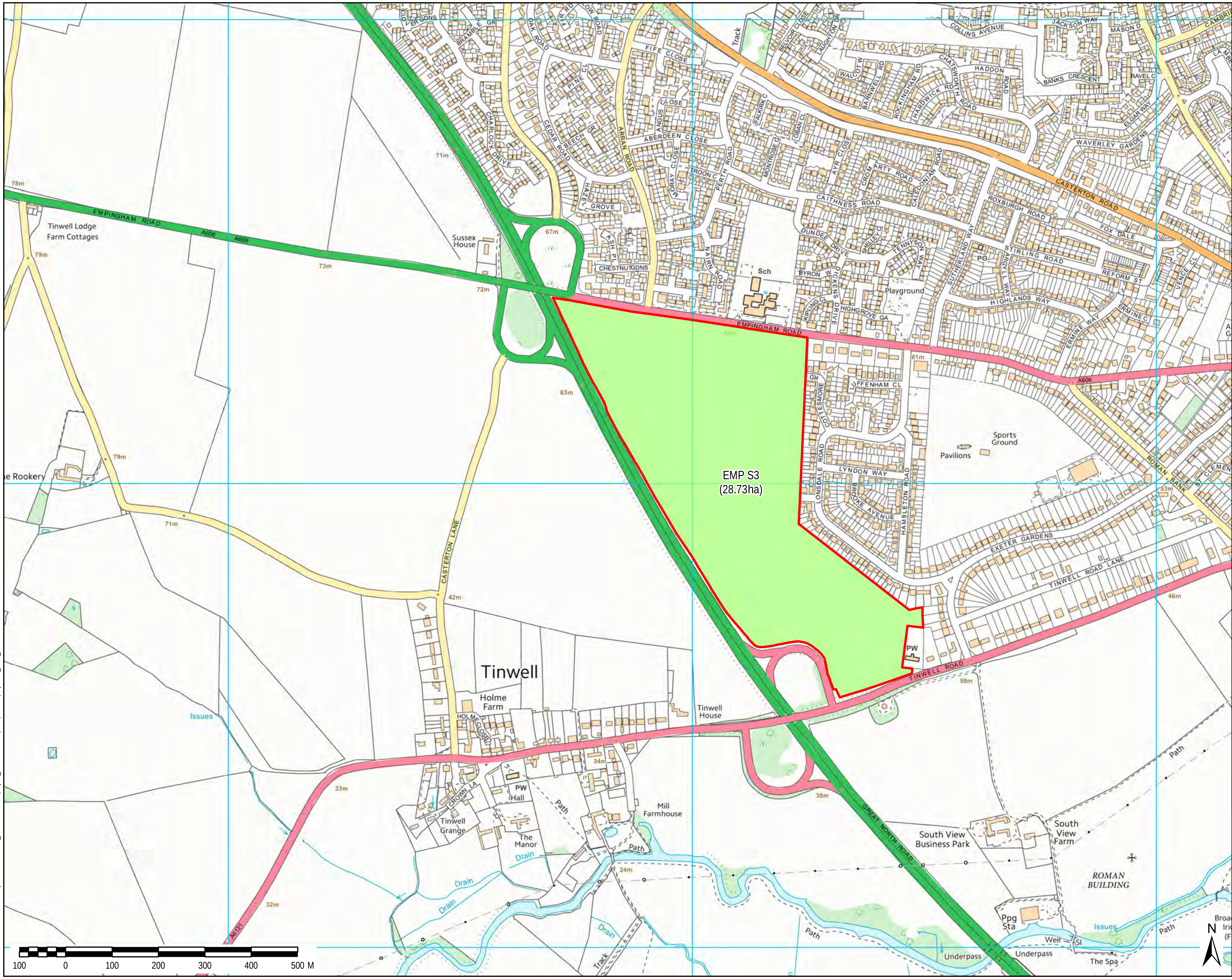
File Name:I:\5004 - Information Systems\47073432_SouthKesteven\project_files\MXDs\Map Outputs\Employment_sites_DDP.mxd



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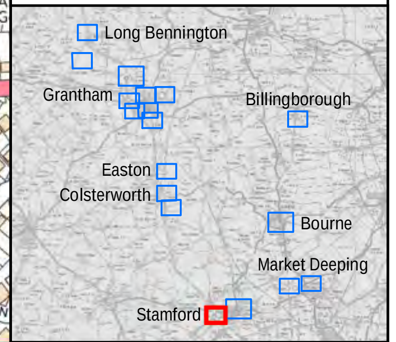
LEGEND

- Cluster boundary
- Greenfield site



Purpose of Issue

Client
SOUTH KESTEVEN DC

Project Title
SOUTH KESTEVEN LOCAL PLAN

Drawing Title
EMPLOYMENT LAND

Drawn	Checked	Approved	Date
JW	TC	TC	03/06/2015

AECOM Internal Project No.	Scale @ A3
47073432	1:7,500

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FIGURE 15

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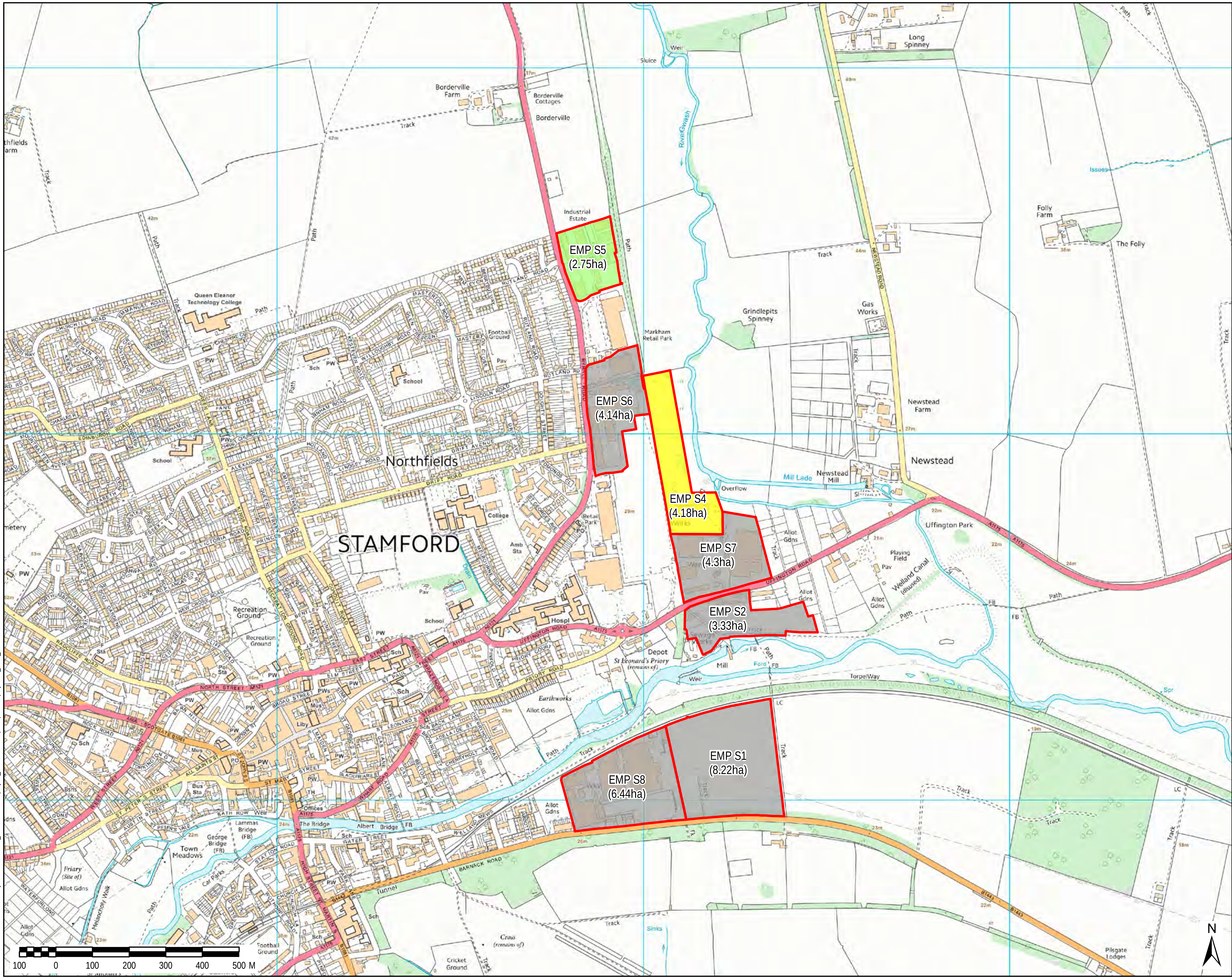

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LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site

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Purpose of Issue

Client

SOUTH KESTEVEN DC

Project Title

SOUTH KESTEVEN
LOCAL PLAN

Drawing Title

EMPLOYMENT LAND

Drawn	Checked	Approved	Date
JW	TC	TC	03/06/2015

AECOM Internal Project No.	Scale @ A3
47073432	1:9,500

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FIGURE 16

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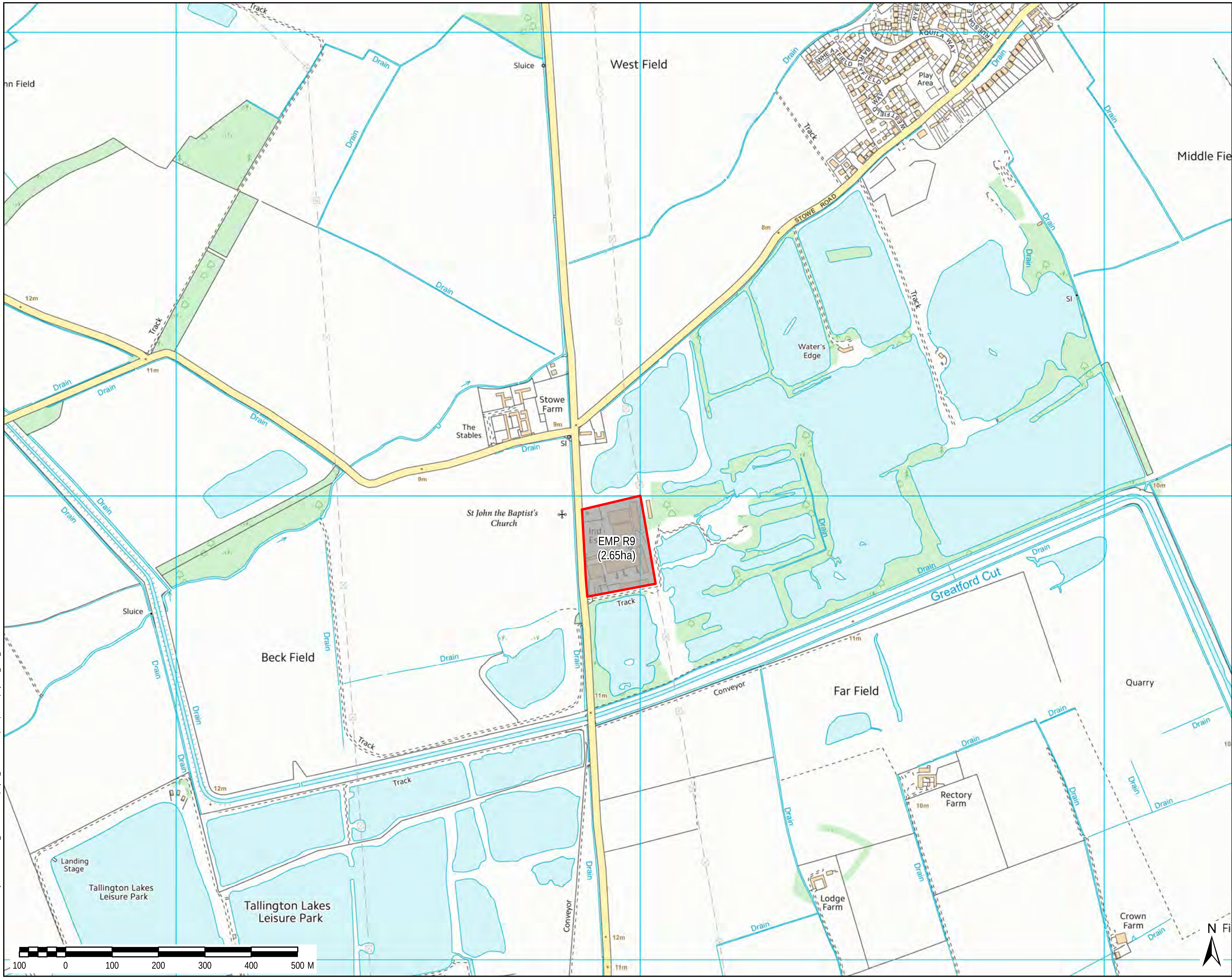

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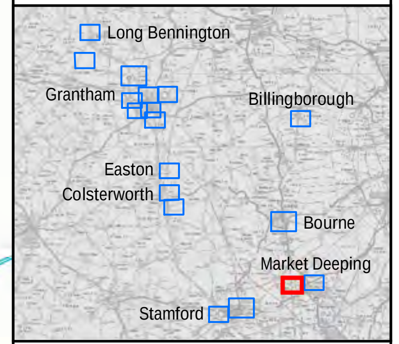
LEGEND

Cluster boundary

Existing employment land



Purpose of Issue

Client

SOUTH KESTEVEN DC

Project Title

SOUTH KESTEVEN LOCAL PLAN

Drawing Title

EMPLOYMENT LAND

Drawn	Checked	Approved	Date
JW	TC	TC	03/06/2015

AECOM Internal Project No.	Scale @ A3
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FIGURE 17

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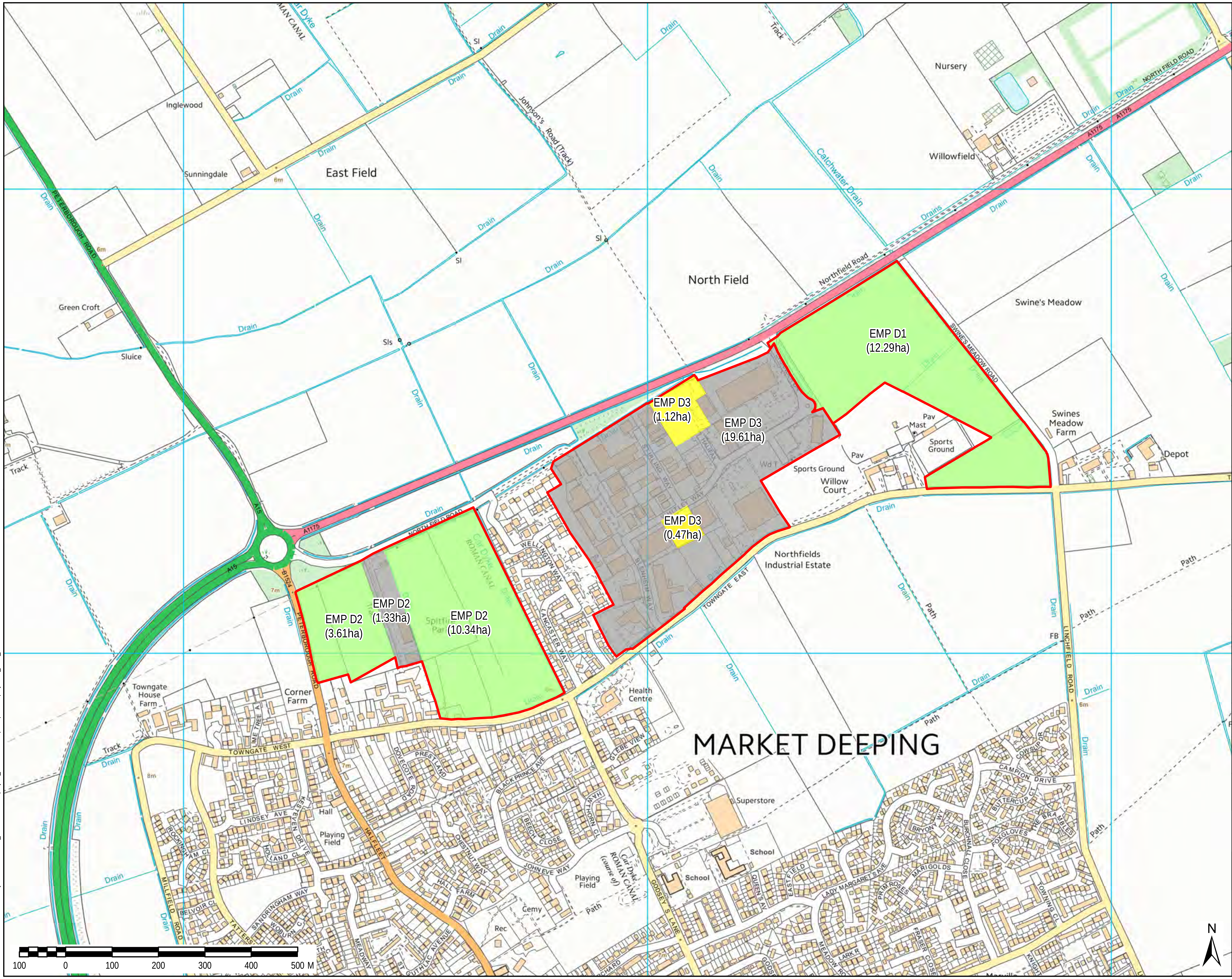

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LEGEND

- Cluster boundary
- Existing employment land
- Vacant developable land
- Greenfield site

Long Bennington
Grantham
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Bourne
Market Deeping
Stamford

Purpose of Issue

Client
SOUTH KESTEVEN DC

Project Title
SOUTH KESTEVEN
LOCAL PLAN

Drawing Title
EMPLOYMENT LAND

Drawn	Checked	Approved	Date
JW	TC	TC	03/06/2015

AECOM Internal Project No.	Scale @ A3
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FIGURE 18

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