



Stroud District Employment Land Review

Stroud District Council

Final Report

March 2021

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EXECUTIVE SUMMARY

- i) This report provides an Employment Land Review for Stroud District. The Study has been commissioned to provide evidence to support the development of the Stroud District Local Plan Review. The ELR takes the employment land requirements set out in the Gloucestershire Economic Needs Assessment (ENA) and identifies a supply of suitable land to meet the needs of the District over 2020-2040.
- ii) The key tasks of the study, as set out in the study brief, are to:
- Understand the outputs and recommendations from the Gloucestershire ENA
 - Review the quantity, quality and accessibility of the existing B/E Class and related land uses employment supply in Stroud District
 - *“Identify and assess the suitability, availability and deliverability of the existing stock in terms of its ability to meet future requirements, including the needs of particular settlements and the spatial requirements of particular sectors of the economy.”*
 - Assess the suitability, availability and deliverability of the proposed seven additional employment allocations set out in the 2019 Draft Local Plan
 - Undertake stakeholder engagement to understand the principal local factors affecting local take-up of employment land
 - Consider local constraints or barriers to employment development and whether and how they could be overcome
 - Recommend a policy approach that will deliver the employment land required by 2040
 - *“Review the Council’s current approach to monitoring employment land, using experience and best practice to demonstrate how the Council can improve systems for monitoring outcomes.”*

Methodology

- iii) A number of research methods have been used, including site visits and interviews with property market stakeholders such as developers, investors, and their agents. Major employers in the District have been individually consulted, as have key public-sector agencies. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken, alongside an assessment of Council methods of monitoring employment land take up. Conditions in the Employment Areas of the District have been reviewed using quantitative and qualitative methods, identifying any

underused or vacant land which may provide opportunities for regeneration and redevelopment, and providing an assessment of long-term area viability. Finally, the land supply, both existing Local Plan allocations, and future strategic/local development opportunities has been assessed against agreed criteria. The methodology follows Planning Practice Guidance on employment land reviews.

Findings

- iv) From the ENA study, an identified employment land need for Stroud District using the labour supply growth scenario is identified as 18.0 ha for E(g) (i/ii) uses and 44.4 ha for E(g) (iii)/B2/B8. A slightly higher figure is provided using the labour demand growth scenario which would support the continued growth in key sectors. These figures equate to 20.9 ha of E(g) (i/ii) and 50.8 ha of E(g) (iii)/B2/B8. This equates to a total need of 62.4-71.7 ha depending on scenario used.
- v) Stroud District retains a strong manufacturing sector employing 9,500 in 2018, 18.3 percent of total employment. Local manufacturing employment grew by 500 jobs over 2015-18 in defiance of forecasting for the ENA Study which suggest the sector will decline by up to 2,000 jobs to 2040. The Construction sector employs 3,750 people in 750 businesses locally and will be a further source of requirements for industrial space.
- vi) Transportation and storage play a fairly modest role in the local economy, accounting for 3.1 percent of those in employment and 2.6 percent of businesses. Stroud District's logistics sector appears to be focused in a modest number of large employers, such as Downton and those employers are drawing a lot of labour from outside of the District, unsurprising given the focus of local logistics at Quedgeley/Junction 12, M5 on the edge of Gloucester.
- vii) Sectors typically found in private offices, Professional, scientific and technical, ICT and Business administration, account for 10.9 percent of employees. This is lower than wider averages although still accounts for 6,075 jobs locally. ENA forecasting also suggests Stroud District will gain 1,820-2,250 extra jobs in E(g) (i) sectors to 2040. Most businesses in this sector are micro in size, employing an average of three people. Such micro firms will typically require developed property, including multi-let space, more likely to be found in established business schemes/town centres, rather than development land.
- viii) There are 1,500 business accommodating 6,780 jobs within Stroud District, at

2018/19, that can be calculated as having all or some focus upon being green, i.e. helping to support a low carbon future or deliver other environmental benefits. This accounts for 13.0 percent of local employment and around a quarter of businesses. If a Green business park were to be delivered at Junction 12, M5 or elsewhere, then this does suggest a reasonable proportion of the local economy who could seek space. Although, examples of other Green business parks in the UK point to their property, services and accessibility being the 'green' element rather than the nature of the occupiers themselves.

- ix) Overall Stroud District has an active local property market with local occupancy rates well above 90 percent for industrial and, to a lesser degree, office space. This suggests an undersupply of premises against demand.
- x) Quedgeley, Hardwicke and Junction 12, M5 are a focus of industrial and warehouse development with prime rents reaching £8.50/ sqft (£92/ sqm) and freehold sale values of £100-150/ sqft (£1,076-1,614/ sqm). The area has an active local industrial market with units of 1,000-4,000 sqm most commonly taken up and identified requirements for units up to 5,000 sqm. In terms of supply, all the available units of more than 3,600 sqm in size, in Stroud District, are found at St Modwen Park and Quadrant 12.
- xi) Stonehouse is another focus of industrial market activity for properties up to 4,000 sqm, with units of 1,000 sqm most commonly transacted. Rents are at £6/ sqft (£65/ sqm) and freehold values £83-93/ sqft (£900-1,000/ sqm). Stakeholders also identify Stonehouse as a focus for local office market activity, with best rents achieved at Stonehouse Park of £15/ sqft (£161/ sqm). The average transaction was for around 400 sqm, with units let/sold in the last decade up to 2,500 sqm. Office centres such as Stonehouse will potentially benefit from limited demand in Gloucester City Centre and a loss of City Centre supply to housing. However, the development of the Cheltenham Cyber Business Park next to the GCHQ facility will take up a lot of the County's demand from ICT businesses.
- xii) The Stroud Valleys retain a market for older units of less than 500 sqm, which are only attracting modest rents of £2.50-4.50/sqft (£27-48/sqm). Evidence is a lot of companies are seeking to leave this area and move to more modern options in Stonehouse or in rural schemes. Stroud Town Centre is a key local office market but not superior to Stonehouse or many strong rural locations.

- xiii) Industrial activity in Sharpness is focused around Severn Distribution Park for B/B8 units of 3,000-5,000 sqm. Evidence is Sharpness is well connected to the M5 Corridor area. Gloucester Science and Technology Park (GSTP) has grown to become a key centre for start-ups/micro businesses in technology sectors and has scope to expand across the rest of the decommissioned Berkeley Nuclear Facility, another 16 ha of land. This will meet a lot of needs in the Sharpness area and across the District more generally. The Eco Park at Junction 13, M5 is identified as a location which could provide grow-on space to compliment GSTP.
- xiv) Cam/Dursley have a strong local industrial market, which has recently seen the strong take up of freehold units at Littlecombe Business Park. The local office market appears negligible.
- xv) Stakeholders report that Stroud District has an active rural market comprising several well-established rural schemes providing a mixture of office and small workshop space. Such rural schemes have an important market role in providing micro and small firms located in the older industrial/office premises of the Stroud Valleys with opportunities for growth and expansion, and premises which meets modern business needs more generally. They also serve sizable rural catchments. Such businesses want modern premises not the design and build development options which are being offered at Employment Sites such as West of Stonehouse. Additionally, the main Employment Sites at Quedgeley/Junction 12, M5 and Stonehouse have been, and are likely to continue to be, developed for larger B2/B8 options.
- xvi) Evidence is that the economic impacts of the Covid-19 inspired lockdown are not hitting Stroud District exceptionally hard at present. Moving forward, despite changing practices in office working, there will still be requirements for offices including serviced offices which may provide workers with attractive alternatives to homeworking and larger floorplate offices which give the space to achieve social distancing. The impacts on the manufacturing sector have been varied and will be more dependent on the scale and nature of the economic downturn resulting from the Pandemic than the initial lockdown. Experience at schemes such as St Modwen Park and West of Stonehouse suggests that B2 and B8 premises demand is holding up well so far in 2020, with B8 demand particularly benefitting from growth in e-commerce
- xvii) Based on research, six key segments of market demand have been identified for future employment land to satisfy:

- *Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market*
- *Development to meet the needs of a specific business only*
- *Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse*
- *Local scale expansion/of established Employment Area*
- *Growth of technology sectors, including green businesses*
- *Meeting needs for larger offices in the Stonehouse area.*

Employment Sites and Areas

xviii) The maximum possible employment land supply to 2040, incorporating 2020 Commitments, existing allocations in the adopted 2015 Local Plan, proposed sites in the 2019 Draft Local Plan and further submissions made to Local Plan/SALA/Call for Site exercises is 208.13 ha. However, reflecting good practice, Planning Policy Guidance and the findings of this Study, eight adjustments are made to that supply:

- Adjustment 1: Exclusion of 45.10 ha Commitments which overlap with allocated and proposed sites, or with other Commitments. I.e., excludes double counting of land
- Adjustment 2: Exclusion of all Commitments affecting less than 0.25 ha of land, 0.56 ha
- Adjustment 3: Exclusion of 15.16 ha of site proposed to meet the needs of a single occupier and/or put forward as Employment Area allocations
- Adjustment 4: Exclusion of 4.50 ha land developed as of mid-2020
- Adjustment 5: Further amendments to reflect stakeholder discussions, planning consents, etc. A reduction of 0.68 ha
- Adjustment 6: Exclusion of Land adjoining Aston Down Business Park as likely not deliverable in planning terms. A 3.80 ha reduction
- Adjustment 7: Reduction allowing for potential losses due to existing permissions for other uses as at 31/03/2020. 17.39 ha of losses, as identified in the Stroud District 2020 Employment Land Availability report
- Adjustment 8: Possible Further Reduction – Reduced Area to Symmetry Park to minimise incursion into the countryside. Land East of Gloucester Road – 15.80 ha – excluded from allocation or held for the longer term.

xix) These amendments suggest a more realistic supply, for Stroud District of 105.14 ha,

including 14 main sites.

- xx) 105.14 ha exceeds the level of employment land need, identified in the ENA Study as 62.4-71.4ha to 2040 (see above). However, the additional supply, above need levels, provides a buffer to allow for further losses of employment land, to other uses, to 2040. In the 14 years between 2006 and 2020 28.44ha of E(g)/B class land was lost from in the District. Although the Study has taken account of known future losses from existing permissions, 17.39 ha at the time of writing, there are likely to be further losses from the local employment stock in the 20 years to 2040, following past trends and potentially increasing due to the new flexibility in changes of use introduced by the E Class. These losses would need replacing and the additional supply identified at this stage will safeguard against any further losses in the baseline supply. This should be subject to active monitoring and feed into future Local Plan reviews.
- xxi) Questions of deliverability remain over the Knowledge Park proposal at the Sharpness New Settlement and to a lesser degree at PS37: New settlement at Wisloe. However, these issues do not mean that no employment land can be brought forward in these schemes. Employment land in the Land north of Grove End Farm mixed-use proposal seems a stronger prospect. Located at Junction 13, M5 and linking to the Stonehouse employment cluster. The land is also under the control of an active local commercial developer.
- xxii) 46 Employment Areas were reviewed across Stroud District, they comprise 345.04 ha of land mostly in active E/B-Class use. Three of these, totalling 9.19 ha of land, have consent for and/or are in the process of being redeveloped for primarily residential uses and should be excluded from future Local Plan allocations for employment uses. The remaining 43 Areas are mostly active and well occupied and should be protected in the Local Plan.

Recommendations

- xxiii) This report has had full regard to the requirements of the NPPF and the PPGs to encourage and deliver growth through the planning system. The recommendations are:
- That, subject to the points raised below, the realistically available land supply in Stroud District be defined as 105.14 ha, including 14 main sites

- That the Council should consider the allocation of Grove End Farm as part of Employment Land Supply
- That the owners, and their agents, of PS36: New Settlement at Sharpness be asked to provide more evidence on deliverability
- That the owners, and their agents, of PS37: New settlement at Wisloe be asked to provide more evidence on deliverability
- That the Council allocate the Junction 13, M5 Eco Park Proposal, but with no restrictions on occupancy
- That the 43 outstanding Employment Areas continue to receive protection as identified under Policies EI1 and EI2/a of the 2019 Draft Local Plan
- That the ten Employment Areas which scored 70 out of 100, or more in the quantitative analysis be identified as 'High Quality Employment Areas' in the Local Plan and receive protection
- That the 26 Employment Areas which achieve a score of 50-69 be identified as 'General Employment Areas' in the Local Plan and receive protection
- That the following Employment Areas be considered as regeneration areas under Policy EI2, or similar:
 - EK4 Brimscombe & Thrupp Hope Mills Industrial Estate
 - EK10 Eastington Meadow Mill Industrial Estate – Only if current large occupier were to vacate
 - EK20 Kingswood Orchestra Works
 - EK24 Nailsworth Spring Mill Industrial Estate
 - ER1 Brimscombe & Thrupp Brimscombe Port Industrial Estate – Regeneration plans in place notwithstanding high scoring
 - ER2 Brimscombe & Thrupp Brimscombe Mills
 - ER3 Ham Mills, Griffin Mills Industrial Estate, London Road
 - ER4 Minchinhampton Wimberley Mills and Dockyard Works
 - ER8 Stafford Mills Industrial Estate, London Road.
- That the Downton HQ, Moreton Valence be allocated as an Employment Area in the Local Plan
- That, subject to other considerations, schemes for rural employment/farm diversification, which are in locations with good road access and are of a scale appropriate to the area, be supported. Applications for the growth of established rural employment locations, which are of a scale appropriate to the area and again which meet other planning criteria, should also be encouraged

- Review and monitor the employment land position and undertake the study again in about five years, as 2040 is a long time in the future and much will happen before then.

1.0 INTRODUCTION

- 1.1 This report provides an employment land review (ELR) for the District of Stroud. It has been carried out on behalf of Stroud District Council (the Council).
- 1.2 The Study has been commissioned to provide evidence to support the development of the Stroud District Local Plan Review. The ELR takes the employment land requirements set out in the Gloucestershire Economic Needs Assessment (ENA), now completed, by DLP Planning, and identifies a supply of suitable land to meet the needs of the District for the period 2020-2040.
- 1.3 BE Group, economic development and property consultants, completed this Study during April-November 2020. Combined with the ENA, this study updates previous employment land evidence base documents for the District, notably the 2013 Stroud District Employment Land Study and 2014 Employment Assessment Review, which were also completed by BE Group.
- 1.4 It should be noted that this study was completed during the Covid-19 Pandemic. This may influence the views of some stakeholders regarding future demand for land and property, although BE Group has encouraged all parties to think long term, beyond the lockdown and the short-term economic impacts resulting from it. Where possible, research has considered what the longer term impacts of the Covid-19 Pandemic might be on the local demand for land and property.
- 1.5 The key tasks of the study, as set out in the study brief, are to:
- *“Liaise with DLP Planning to understand the emerging outputs and recommendations from the Gloucestershire ENA and to ensure an efficient use of resources in seamlessly taking forward the ELR for Stroud District*
 - *Review the quantity, quality and accessibility of the existing B class and related land uses employment supply; 37 existing Local Plan key employment sites (Delivery Policy EI1 and EI2a), 9 existing employment sites in need of regeneration (Delivery Policy EI2), a sample of small rural employment sites (Delivery Policy EI4) and the 4 employment allocations in the current Local Plan (Core Policy CP2)*
 - *Identify and assess the suitability, availability and deliverability of the existing stock in terms of its ability to meet future requirements, including the needs of particular settlements and the spatial requirements of particular sectors of the economy.*

- *Assess the suitability, availability and deliverability of the proposed 7 additional employment allocations set out in the 2019 Draft Local Plan (Draft Core Policy CP2) and other potential land to meet the requirements of the Stroud economy*
- *Undertake stakeholder engagement to understand the principal local factors affecting local take-up of employment land (building upon previous engagement work in the ENA)*
- *Consider local constraints or barriers to employment development and whether and how they could be overcome*
- *Recommend a policy approach that will deliver the employment land required by 2040, including reviewing the employment policies within the Draft Local Plan, considering the need to protect particular employment sites from alternative uses and recommending site specific allocations where necessary*
- *Review the Council's current approach to monitoring employment land, using experience and best practice to demonstrate how the Council can improve systems for monitoring outcomes. This should ensure policies and employment land supply remain robust and up to date."*

Background

- 1.6 In November 2015, the Council adopted a new Local Plan for the Stroud District for the period up to 2031. The District Council is now in the process of reviewing the Stroud District Local Plan. The first stage was an Issues and Options public consultation, which took place during autumn 2017, followed by periods of public consultation over 2018-19 and 2019-20. The aim is to reach a pre-submission stage by spring 2021 and to adopt a new Local Plan by the end of 2022.
- 1.7 In late 2019 the Gloucestershire local planning authorities jointly commissioned DLP Planning to prepare the Gloucestershire ENA. Amongst other tasks, this was to *"identify future quantitative needs for B class and related land uses for each Gloucestershire district based on sectoral and employment forecasts, future employment needs and past take-up of land."* The ENA identifies the employment land need in Stroud District, to 2040, and this ELR will identify the land available in the District to meet that need. Both pieces of evidence will inform the emerging Local Plan.

Methodology

- 1.8 Research methods used include site visits and face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents.

Consultations were undertaken with a number of the District's major private sector employers and key public sector agencies. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken, alongside an assessment of Council methods of monitoring employment land take up.

- 1.9 Conditions in the Employment Areas of the District have been reviewed using quantitative and qualitative methods, identifying any underused or vacant land which may provide opportunities for regeneration and redevelopment, and providing an assessment of long-term area viability.
- 1.10 Finally, the land supply, both existing Local Plan allocations, and future strategic/local development opportunities has been assessed against agreed criteria. This is then developed into a series of economic development recommendations that cover not just land, but also premises.
- 1.11 A list of those contacted for this ELR is provided in Appendix 1.

Employment Land Review Guidance

- 1.12 A key reason for undertaking the updated ELR is to take account of published Planning Practice Guidance (PPG), which provides guidance on how local authorities should approach both housing and employment land reviews. *Housing and Economic Land Availability Assessment*, issued in 2014 and updated in 2018-19, provides a methodology of reviewing suitable land. A second PPG *Effective Use of Land* provides advice on assessing whether existing employment allocations should be protected or reallocated for a more deliverable use.
- 1.13 The assessment process takes the form of a five-stage methodology under the following headings:
 - **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). Identification methods may include a public 'Call for Sites' exercised by the local authority. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
 - **Stage 2: Site/broad location assessment** to estimate the development

potential. This will include a re-appraisal of the suitability of previously allocated land, and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability' in order to confirm which of them are unsuitable for/unlikely to continue in E(g)/B2/B8 employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:

- *"The best fit functional economic market area*
- *The existing stock of land within the area - this will indicate a baseline for land in employment uses*
- *The recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or loss to permitted development)*
- *Market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business*
- *Market signals – based on projected growth in the certain markets and demographic changes and*
- *Oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively."*
- When considering whether there is a realistic prospect of an existing employment site being developed for its intended use, PPG *Effective Use of Land* suggests that the following factors be taken into account:
 - *"The length of time since the site was allocated in the development plan*
 - *The planning history of the site including any planning applications or pre-application enquiries;*
 - *Whether there is evidence that the site has been actively marketed for its intended use for a reasonable period, and at a realistic price; and*
 - *Whether there are any changes of circumstance that mean that take-up of the site for its intended use is now unlikely.*
- *Where an alternative use for the allocated site is proposed, it will also be*

relevant to consider the extent to which evidence suggests the alternative use would address an unmet need, as well as the implications for the wider planning strategy for the area and other development plan policies.”

- **Stage 3: Windfall assessment** not applicable as relates to housing only.
- **Stage 4: Assessment review** ascertaining the need for economic development uses. This is being completed in the Gloucestershire ENA Study.
- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in the Local Plan. The Review is prepared in line with this advice.

1.14 Table 1 shows how the ELR aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

| Stage 1 – Site / Broad Location Identification | |
|--|--|
| Determine assessment area and site size | Undertaken by Stroud District Council |
| Desktop review of existing information | Review of the policy position, socio-economic position, local/sub-regional property market and the 2020 land supply (Covered in Sections 2, 3, 4, 5, 7) |
| Call for sites / broad locations | Call for Sites exercises completed internally by Stroud District Council. Relevant sites reviewed in Section 7 |
| Site / broad location survey | Review of available employment sites. Broad locations to meet future land needs completed in Conclusions and Recommendations. (Covered in Sections 6,7, 9 and Appendices) |
| Stage 2 – Site / Broad Location Assessment | |
| Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability | Covered in Section 7 and Appendices |
| Overcoming constraints | Covered in Section 7 and Appendices |
| Stage 3 – Windfall Assessment | |
| Determine housing / economic development potential of windfall sites (where justified) | N/A |
| Stage 4 – Assessment Review | |
| Review assessment and prepare draft trajectory; enough sites / broad locations? | Section 7, 9. Informed by ENA Study |
| Stage 5 – Final Evidence Base | |

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| Step 12 – Evidence Base and monitoring | ELR produced by BE Group and monitoring undertaken by Stroud District Council. Council monitoring arrangements reviewed in Section 8. |
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Source: BE Group, 2020

2.0 STRATEGIC AND POLICY CONTEXT

2.1 This section focuses on national, regional and local reports that have a relevance to the allocation of employment land and premises within Stroud. Any reports which have already been reviewed within the ENA will be only briefly summarised here.

National

National Planning Policy Framework (NPPF), 2019

2.2 The framework set out planning policies for England, as made by the Government, and the ways in which they can be applied. The introduction stated that it “*provides a framework within which locally-prepared plans for housing and other development can be produced.*” The NPPF must be taken into account when developing local authority development plans and remains a material consideration in planning decisions.

2.3 Most substantive amendments to the 2012 NPPF focused on housing policy and practice rather than employment. In terms of Local Plans, the NPPF recommended plan reviews be completed no later than five years after adoption (Para 33) and required Local Planning Authorities to prepare a statement of common ground with neighbouring authorities (Para 27).

2.4 Key for employment, and other sites, was Chapter 11 on making ‘Effective Use of Land.’ Para 120 encouraged reallocating land where there is no reasonable prospect of an application coming forward for the allocated use, specifically Local Planning Authorities should:

- a) *as part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped); and*
- b) *in the interim, prior to updating the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area.”*

2.5 “*Local planning authorities should also take a positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to ... use retail and employment land for*

homes in areas of high housing demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework.” (Para 121).

- 2.6 Additionally, planning policy should *“promote and support the development of under-utilised land and buildings, especially if this would help to meet identified needs for housing where land supply is constrained and available sites could be used more effectively (for example converting space above shops, and building on or above service yards, car parks, lock-ups and railway infrastructure)” (Para 118).*

Use Class Order Amendments, September 2020

- 2.7 As of September 2020, adjustments have been made to the Use Classes Order which mean that Use Classes A1, A2, A3 and B1 are now to be treated as Class E. The B1 class has been changed to E(g) and defined as “ [Employment] *Uses which can be carried out in a residential area without detriment to its amenity.*” E(g) is further separated into three sub-categories which reflect the previous a, b, c division of the B1 Use Class:

- E(g)(i): Offices to carry out any operational or administrative functions (former B1(a))
- E(g)(ii): Research and development of products or processes (former B1(b))
- E(g)(iii): Industrial processes. (former B1(c)).

- 2.8 Class D has also been redefined to newly introduced Classes E and F, with Class F comprising of Local Community and Learning premises. D1 is split out and replaced by the new Classes E(e-f) and F1. D2 is split out and replaced by the new Classes E(d) and F2(c-d) as well as several newly defined ‘Sui Generis’ uses, including:

- Pubs, wine bars and other drinking establishments (including those with expanded food provision)
- Hot food takeaways
- Live music venues
- Cinemas, concert halls, bingo halls and dance halls.

- 2.9 The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged.

- 2.10 The E Class brackets together a wide variety of uses, all of which are now considered to be in the same use class:
- Retail
 - Restaurants
 - Financial, professional or other commercial services
 - Publicly accessible indoor sport, recreation or fitness
 - Publicly available medical or health services
 - Crèches, day nurseries and day centres
 - Offices, including research and development
 - Industrial uses which do not harm amenity.
- 2.11 Planning permission is not required for changes of use within the same use class. This means that many types of business user will be able to change the uses of properties without seeking planning permission. For example, under the new rules, a shop will be able to change to an office and then to a gym and back again, without planning permission.
- 2.12 In order to change the uses within a class, there must have been actual and lawful use (i.e. if the building is not being used or occupied for the use permitted under an existing planning permission, it will need to be brought into that use before it can then change to another use within Class E).
- 2.13 The government has said that the main driver of the changes has been the need to enable a repurposing of buildings on high streets and town centres. The new Class E allows for a mix of uses to reflect changing retail requirements. It will allow a building to be used flexibly by having a number of uses taking place concurrently or by allowing different uses to take place at different times of the day. The aim is for this to support the high street revival and allow greater flexibility to change uses within town centres without the need for planning permission.
- 2.14 From 1st September 2020 to 31st July 2021, permitted development rights enabling a change of use will continue to be applied based on the existing use classes, as they existed on 31st August 2020. After July, the new use classes will apply.

- 2.15 The Government has also implemented separate changes to permitted development rights. These include allowing the demolition and rebuilding of vacant and redundant office and light industrial buildings into dwellings, without planning permission.
- 2.16 To implement this will require that prior approval from the local authority prior to commencement of the development. This includes approval in respect of traffic and highway matters, air traffic and defence asset impacts, contamination risks, flood risk, the external appearance of the building, the provision of adequate natural light in all habitable rooms of the new dwellings, impact on amenity of the existing building and neighbouring premises including overlooking, privacy and loss of light, and the impact on any protected views.
- 2.17 For Stroud District, the practical effects are likely to include:
- Limited impacts on the supply of town centre office stock, which is primarily found in Stroud town, with some properties converted from office to retail and other town centre services. As is discussed in the following sections, some large Town Centre employers are consolidating their operations, but have no plans to fully vacate the Town. A weak retail/town centre service property market in the Covid-19 Pandemic also means this is unlikely to be an issue in the short term
 - This new flexibility has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office type activities, including retail, in out of centre business parks, which runs contrary to national and local planning policies designed to protect town centre retail. At present, Stroud District only has one large office park, plus the Gloucestershire Science and Technology Park, where this may be an issue. The District's other main Employment Areas, including those at Quedgeley/Hardwicke and Stonehouse, mostly comprise larger B2/B8 premises
 - The biggest impacts are likely to be in the Stroud Valleys where the new Use Class/Permitted Development Rights would make the conversion of office and light industrial stock to other uses easier. However, this only accelerates existing trends which have seen a lot of older properties converted to retail/trade uses as E/B Class businesses seek more modern accommodation in other parts of the District. Such changes are not necessarily unwelcome as they bring stock which may no longer meet business needs back into productive use and may even support existing regeneration plans, for example in the Brimscombe and Thrupp areas

- It is noted that several Employment Areas in the Stroud town/edge of settlement area have been, or are in the process of being, converted to housing and retail uses. However, this has been by the full clearance and redevelopment of stock which could not be easily converted. Such major changes would still require consent.
- 2.18 There will also be policy impacts as Local Plan policies which seek to protect specific uses in the town centre, or office space within designated areas, will no longer be enforceable.
- 2.19 Landlords will also need to be particularly aware of the new arrangements when looking at leases and the extent of use that is authorised. Allowing too broad a permitted use could now result in undesirable changes of use within the scope of the lease, and landlords will not be able to fall back on the planning system to prevent such changes.
- 2.20 The changes will also have an impact on property valuation. For example, a property which had achieved a desirable change of use may now find that any such extant permission is unnecessary and does not result in an uplift in value. Similarly, there is likely to be a levelling-out of values for properties within the new use class, given the interchangeability of uses therein.

Sub-Regional

Gloucestershire Economic Needs Assessment (ENA), 2020

- 2.21 The ENA was commissioned by the Gloucestershire Councils to forecast the need for E/B-Class employment across the six local authority areas of Gloucestershire, including Stroud District over 2021-2041 (2020-2040 in the case of Stroud District). It compliments this ELR which, for Stroud District only, identifies the E/B-Class employment land available to meet that identified need.
- 2.22 The ENA *“provides a high-level assessment of the Gloucestershire economy, investigating the economic potential of Gloucestershire and identifying realistic yet aspirational growth scenarios based on economic forecasts and modelled scenarios for the delivery of employment land (B class uses).”* The main tasks of this ENA are to:

- *“Identify the Functional Economic Market Area (FEMA) for planning purposes.*
- *Provide a review of the context in neighbouring areas and the wider region.*
- *Provide an assessment of the economic performance and characteristics and commercial property market.*
- *Consider a range of scenarios for future economic growth in Gloucestershire and for each of the authorities.*
- *Identify future employment land requirements for Gloucestershire and for each of the authorities”.*

The Gloucestershire Functional Economic Market Area (FEMA)

2.23 Commercial property market activity was focused along the M5 Corridor which includes the majority of the County’s largest employment areas and the settlements of Cheltenham, Gloucester, Tewkesbury, and Stroud. Travel to Work Areas broadly overlap within this area, although there was some distinction between the commuting areas of Cheltenham and Gloucester. All of the Gloucestershire authorities combined had a self-containment rate of 83-84 percent. This represented a high level of self-containment, and was higher than any other combination of these authorities with areas outside of the County. Although Stroud District had some linkages with South Gloucestershire/West of England the six Gloucestershire authorities can be considered to form a single FEMA.

Economic Performance and the Commercial Property Market

2.24 The Gloucestershire economy supports around 339,000 jobs. Manufacturing was a strength of Stroud District accounting for 18.4 percent of Stroud District’s employment against 11.8 percent across the County and 8.2 percent nationally. Advanced manufacturing sub-sectors had a strong role in the Gloucestershire economy, notably the manufacture of machinery and equipment; transport equipment; computer, electronic and optical products; motor vehicles; and electrical equipment. Together, these sub-sectors accounted for 46 percent of all manufacturing jobs in Gloucestershire.

2.25 Cheltenham and Gloucester were both centres of employment in E(g) (i) offices, with both having strengths in public sector employment, finance and insurance and, in the case of Cheltenham, ICT.

2.26 An assessment of the commercial property market indicated that demand for industrial and warehouse space in Gloucestershire was focused primarily along the M5 corridor,

from Junction 9 to Junction 12. Junction 13, Stonehouse was also popular although was identified as having a distinct market from the Cheltenham/Gloucester/Tewkesbury settlement area. Units of 100-1,000 sqm were most commonly required. Companies were drawn to, and retained within, this market area at least in part because of the skilled local workforce. Gloucestershire's workforce had particular skill strengths in certain high-end manufacturing sub-sectors, as well as nuclear energy, other forms of energy, and cyber security.

- 2.27 Beyond the M5 corridor, the Stroud Valleys along the A46 and A419 principally comprised more traditional employment sites which were generally smaller sites and units comprising more dated stock. The county had been gaining industrial stock, an increase of 88,165 sqm in 2011, but three quarters of this growth had been in Tewkesbury. Stock growth had been at less than 1 percent/year in Stroud District, and in the other Gloucestershire local authority areas, apart from Tewkesbury. In Stroud District, as well as the Forest of Dean, this was felt to reflect the high levels of available older floorspace, which meets a lot of business needs and depresses demand, and the rents which companies were willing to pay, for new build space.
- 2.28 The industrial vacancy rate in Stroud District was identified at 10.5 percent, comparable to that in Gloucester and suggesting a reasonable amount of choice in the stock available to businesses, without suggesting particular issues of oversupply. The county-wide vacancy rate was a slightly more constrained, 6.9 percent.
- 2.29 Demand for office space was principally focused in Gloucester, Cheltenham, and neighbouring businesses parks, with smaller units of 0-500 sqm required. Gloucester City Centre and Cheltenham Town Centre were the most sought-after locations due to the proximity to town centre retail, leisure and amenities and public transport links. However, Gloucester had been losing a lot of E(g) (i) stock via permitted development rights to residential uses, which may provide opportunities for other locations to meet some needs. Beyond the city centres, Quedgeley and the area around J12 in Gloucester/Stroud districts provided a business park type offer which was a popular location.
- 2.30 Office vacancy rates were at 2.6 percent across the county and at 7.6 percent in Stroud District specifically, suggesting a constrained market with little choice for businesses.

2.31 This was seen in the development of new office stock. Since 2011, Stroud District has gained 39,000 sqm of E(g) (i) stock equating to 5 percent growth/year. By comparison Gloucester only gained 1,200 sqm/year of a 0.5 percent growth rate. Again, this was felt to reflect the fact that most recent office developments had been on the fringes of Gloucester, at Quedgeley in Stroud District as well as at Gloucester Business Park in Tewksbury.

Forecast Needs

2.32 There is no set formula for assessing future needs. Guidance points to a range of trend data that may be used, including employment demand, labour supply and historic take-up. All of these models were considered in the ENA.

Forward Projection of Historic Take Up

2.33 Tables 2-3 summarise the ENA's model for projecting forward growth over 2021-2041 using past take up. For consistency across the six Gloucestershire districts, available take up data for the years 2011-19 was used, although it is worth noting that for Stroud District at least, completions data going back to 1991 can be sourced from past research, including the 2013 Stroud Employment Land Study completed by BE Group.

2.34 As Table 2 shows, Stroud District had seen the second highest level of average annual completions over 2011-19, after Tewkesbury. At 11,880 sqm/year, Stroud District's average annual take up rate was more than double that of Gloucester's and nearly four times that of Cheltenham's. This supported statements made in the ENA's Commercial Property Market assessment that most recent E/B-Class development has taken place outside of the two main urban areas of the county, in locations including Quedgeley/Junction 12, M5. Stroud District had also seen the highest rates of E(g) (i/ii) office development in Gloucestershire, again noticeably above rates in Cheltenham and particularly Gloucester. This reflects completions at Stonehouse and Quedgeley as well as developments to meet the needs of large local businesses.

Table 2 – B Class Completions/year by Local Authority, 2011-19 (sqm)

| District | E(g) (i/ii) | E(g) (iii)/B2 | B8 | Total |
|----------------|-------------|---------------|-------|-------|
| Cheltenham | 2,591 | 394 | 238 | 3,223 |
| Cotswold | 2,790 | 2,461 | 2,014 | 7,265 |
| Forest of Dean | - | 850 | 125 | 975 |
| Gloucester | 1,224 | 2,229 | 1,818 | 5,272 |

| | | | | |
|-----------------|--------------|--------------|--------------|---------------|
| Stroud | 4,873 | 3,779 | 3,227 | 11,880 |
| Tewkesbury | 2,703 | 2,595 | 7,958 | 13,256 |
| Gloucestershire | 12,786 | 11,077 | 14,374 | 38,237 |

Source: Gloucestershire Authorities, 2020

2.35 As Table 3 shows, the average annual take up rate for Stroud District was then projected forward for 20 years to give a need of 237,700 sqm. This is then converted into a land need by dividing the floorspace totals by 4,000. I.e. by assuming that for every hectare of employment land developed, 40 percent of the site will be covered by buildings, the rest by ancillary uses such as car parking, access roads, etc. This generated a land requirement of 59.4 ha to 2041, or 28.3 percent of the total employment land requirement for Gloucestershire of 209.3 ha. Reflecting past data, Stroud District's requirement included a strong E(g) (i/ii) office requirement of 24.4 ha or 41.1 percent of the total need for Stroud District.

Table 3 – Take Up Growth Scenario – Stroud District

| | E(g) (i/ii) | E(g) (iii)/B2 | B8 | Total |
|--|--------------------|----------------------|-----------|--------------|
| B Class Completions/year in Stroud District, 2011-19 (sqm) | 4,873 | 3,779 | 3,227 | 11,880 |
| 20 Year Floorspace Requirement Based on Past Completions Trend (sqm) | 97,500 | 75,600 | 64,500 | 237,600 |
| 20-Year Land Requirement Based on Past Completions Trend (ha) | 24.4 | 18.9 | 16.1 | 59.4 |

Source: Gloucestershire Authorities, 2020

Labour Demand Scenarios

2.36 Projection of jobs change was based on three forecasts of employment from 2019:

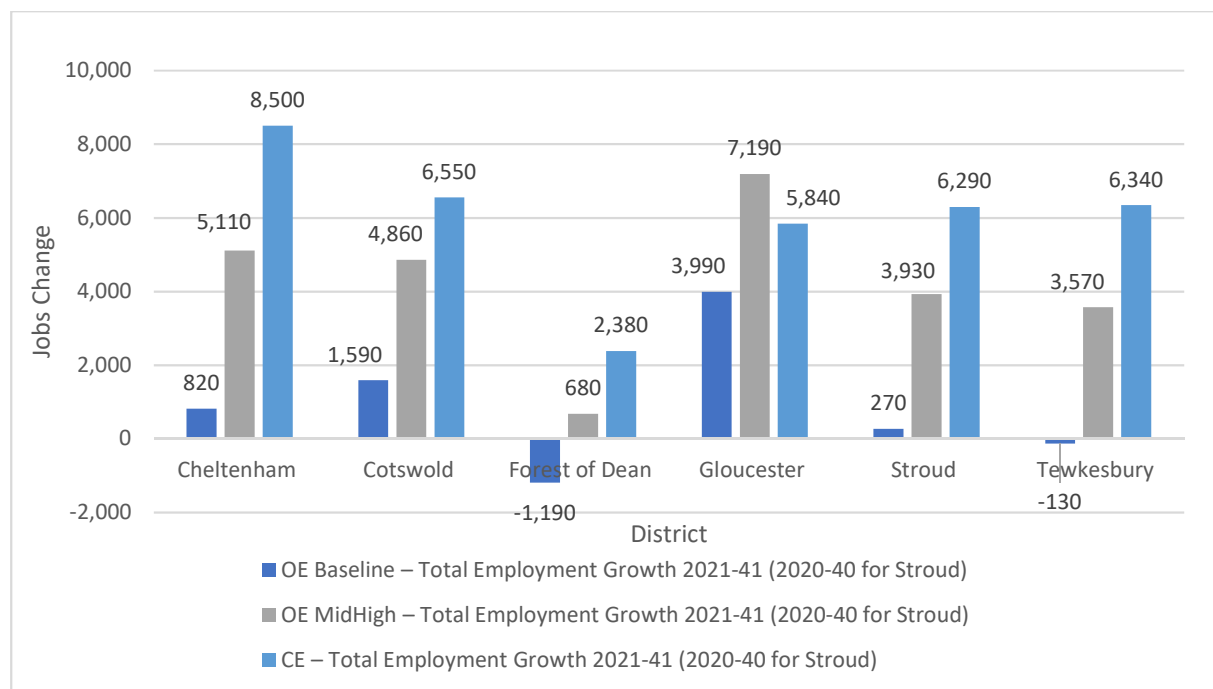
- Oxford Economics (OE) Baseline forecast
- Oxford Economics Medium-High forecast
- Cambridge Econometrics (CE) forecast.

2.37 Figure 1 shows the total jobs change forecast by the three scenarios, for each Gloucestershire District. Growth of 270-6,290 jobs was forecast for Stroud District, relatively average rates of growth when compared to equivalent forecasts for other

Districts and with the OE baseline forecast being notably more pessimistic about jobs growth than the others.

2.38 Despite the large differences in total jobs growth projections, all three forecasts showed comparable trends in sectoral change. All three predicted that manufacturing employment will decline across the county, by -1,720 - -2,760 in the case of Stroud District, while construction will gain jobs, 610-1,490 jobs in Stroud. Transportation and storage will gain some 30-200 jobs in Stroud District, fairly modest growth when considered against the sizable B2/B8 schemes which are being delivered/or proposed round Junction 12, M5 in Stroud.

Figure 1 – Total Jobs Change by Forecast, 2021-2041 (2020-2040 for Stroud District)



Source: Gloucestershire Authorities, 2020

2.39 The bulk of the jobs growth was forecast to be in private sectors which will require E(g) (i) office space. For Stroud at least, this does broadly reflect the sizable amount of office floorspace which has been completed locally in recent years and therefore the direction of future growth which is forecast from take up. For Stroud District the net office-based jobs growth will be:

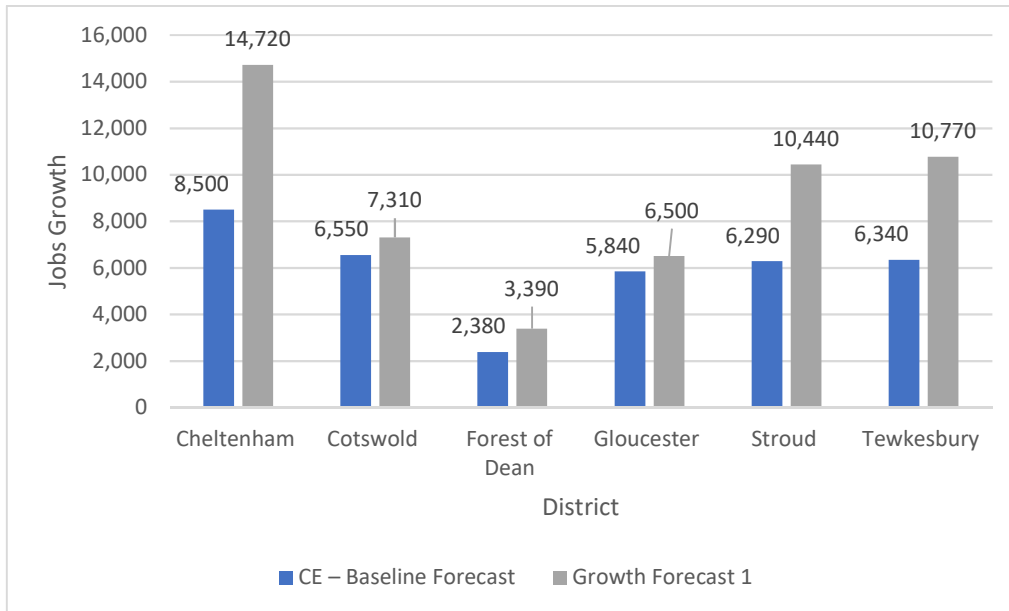
- OE Baseline forecast – 1,820 extra jobs
- OE Medium-High forecast – 3,620 extra jobs
- CE forecast – 2,250 extra jobs.

- 2.40 The ENA compared these forecasts against the forecasts from the Councils' previous employment land evidence documents – forecasts with a base date of 2014. Relevant Business Register and Employment Survey (BRES) Data showed that almost all of the authorities have seen stronger jobs growth over the period 2011-18 than was predicted in the 2014 forecasts. The 2019 CE forecast did not show any significant uplift on the 2014 version in terms of projections of overall jobs growth, i.e., it was likely to underestimate real world jobs growth just as the 2014 forecasts did. The OE forecasts were considerably more negative than their 2014 predecessors, i.e., there was a good chance they significantly underestimate real world change.
- 2.41 The pessimistic growth projections of the OE forecasts, and to a lesser degree the CE forecasts, were felt to reflect forecasters' views of how the sectors will perform following the UK's withdrawal from the EU. However, they also reflected projections about the changing structure of the national economy from one focused on manufacturing, to focus more on financial and businesses services.
- 2.42 The ENA argued that such national projections do not fully reflect Gloucestershire's economy which, as noted above, includes a thriving advanced manufacturing sector. To try and address this, two further forecasts were created, adjusting the CE Forecast, i.e., the most optimistic scenario, to reflect:
- An increase in manufacturing jobs to account for growth in advanced manufacturing sectors. This impacted on all areas largely cancelling the largescale losses seen in the CE forecast. This had most significant impacts for Stroud and Tewkesbury as these two authorities had the largest manufacturing bases in the county.
 - An increase in job growth in the Electricity, gas and water. This had most significant impacts for Gloucester and Tewkesbury
 - An increase in job growth in the Information and communications sector. This had a positive impact for all authorities and increased the total Gloucestershire-wide jobs growth for the sector to 6,880. This broadly correlated with the plans for the Cheltenham Cyber Technology Park that will deliver up to 7,500 high value jobs in the sector. This supported the increased job growth in the sector shown in the Growth Forecast, however it would mean that the uplift in new jobs created in the sector (5,380) would all be met in Cheltenham District. An alternative Growth Forecast was therefore developed where the additional jobs in this sector were met

in Cheltenham. In this alternative forecast the other local authorities see sectoral growth in-line with the CE forecast.

2.43 The outputs of the expanded forecast (Growth Forecast 1), which does increase forecast jobs growth in Stroud District, are shown in Figure 2. For the Stroud District the Growth forecast was a gain of 10,440 jobs and increase of 4,150 jobs on the previous forecast. This included a forecast net gain of 420 manufacturing jobs, against previous forecasts of negative growth, plus 3,990 extra private sector office jobs.

Figure 2 – Total Jobs Change by Forecast – CE Existing/Growth Forecast, 2021-2041 (2020-2040 for Stroud District)



Source: Gloucestershire Authorities, 2020

2.44 The method for modelling labour demand need is summarised in Table 4.

Table 4 – Overview of Forecasting Assumptions

| Forecasting Stage | Key Assumptions |
|----------------------------|--|
| Full Time Equivalent Jobs | Full time equivalent (FTE) jobs has been calculated for each sector for each authority. This was based on full-time and part-time employment data from BRES. An average was taken for the years 2015-18. |
| Sectoral Jobs by Use Class | The proportion of jobs in each sector was divided by the type of employment (B Class) use class and non-employment use classes. The use class proportions for each sector were based on detailed (SIC4 sub-sectors) BRES data for each sector. Each SIC4 sub-sector had been allocated a use class, and this was used to calculate the |

| | | |
|--------------------|----|---|
| | | proportional jobs in each sector by use class, where the proportions of each sector reflect the proportions of jobs in each SIC4 sub-sector. |
| Plot Ratios | | The next stage was to convert floorspace requirements to land requirements. This was calculated by dividing the floorspace totals by 4,000. I.e. for every hectare of employment land developed, 40 percent of the site will be covered by buildings, the rest by ancillary uses such as car parking, access roads, etc. |
| Net to Gross | | The econometric forecasts all provide jobs growth on a net basis – i.e. they include for sectors which will see growth and sectors which will see decline. This means figures up to this point are net. The next stage was to convert this to gross development needs. This was done by accounting for the quantum of losses of existing stock which will be expected to be lost over the forecasting period. This was estimated based on past trends of employment land lost to other uses in each authority since 2011/12 annualised and then forecast forward over the 20-year forecasting period. |
| Margin Flexibility | of | For the final stage, the ENA added a margin of flexibility. This reflected the following factors: <ul style="list-style-type: none"> • To allow greater flexibility to support changing business needs • To provide a choice of sites to facilitate competition in the property market • To provide flexibility to allow for any delays in individual sites coming forward • The potential error margin associated with the forecasting process. The flexibility margin is typically 2-5 years' worth of past completions. For Stroud this equates to an extra 14.8 ha of need – 6.1 ha of E(g) (i/ii) 4.7 ha of E(g) (iii)/B2 and 4.0 ha of B8. This approach broadly reflected the approach of BE Group in completing some 60 employment land reviews since 2006, where a buffer of around 5 years was added. |
| Total Land Needs | | Outputs were provided in terms of hectares required for each type of employment use. |

Source: Gloucestershire Authorities, 2020

2.45 Table 5 summarises the land need outputs of the various forecasts estimating that Stroud needs 11.3-71.8 ha of land depending on which scenario is used.

Table 5 - Summary of Labour Demand Scenarios by Local Authority, 2021-41 (2020-40 for Stroud), Hectares

| District | OE Baseline | OE MidHigh | CE | Growth Scenario 1 | Growth Scenario 2 |
|------------------------|--------------|--------------|--------------|-------------------|-------------------|
| Cheltenham | 15.1 | 32.3 | 29.6 | 43.8 | 56.5 |
| Cotswold | 32.2 | 44.8 | 43.1 | 52.1 | 48.6 |
| Forest of Dean | -1.0 | 8.7 | 10.9 | 21.9 | 21.4 |
| Gloucester | 38.2 | 52.7 | 44.6 | 53.6 | 49.1 |
| <i>Stroud</i> | <i>11.3</i> | <i>34.0</i> | <i>41.1</i> | <i>71.8</i> | <i>69.5</i> |
| Tewkesbury | 16.8 | 38.9 | 48.6 | 98.4 | 96.2 |
| Gloucestershire | 112.6 | 211.5 | 217.9 | 341.6 | 341.3 |

Source: Gloucestershire Authorities, 2020

Labour Supply Scenarios

2.46 This final approach forecasted future employment land needs based on future population growth – the labour supply approach. One of the benefits of considering a labour supply approach was to consider alignment between future housing and employment land needs. The starting point for the labour supply approach was the quantum of housing delivery expected over the study period to 2041. This was informed by the Gloucestershire Local Housing Needs Assessment (LHNA), 2020.

2.47 Table 6 shows how the LHNA data was converted to give a forecast jobs supply figure of 7,740 to 2040 for Stroud District.

Table 6 - Demographic-Led Jobs Growth, 2021-41

| Source | Source | JCS | Cotswold | Forest of Dean | Stroud* | Total |
|---|-----------------|--------|----------|----------------|---------|--------|
| Projected workers from LHNA | LHNA | 18,936 | 3,700 | 3,154 | 6,648 | 32,438 |
| Percent inward commuting | LHNA | 11.4 | 21.5 | 12.2 | 10.0 | - |
| Increase in Main jobs | Derived figure | 21,372 | 4,713 | 3,592 | 7,387 | 37,065 |
| Double Jobbing (workers in multiple jobs) | Source: OE 2020 | 4.6% | 4.6% | 4.6% | 4.6% | 4.6% |
| Total Employment | Derived figure | 22,394 | 4,939 | 3,764 | 7,740 | 38,837 |

Source: Gloucestershire Authorities, 2020

*Stroud figures for 2020-40

2.48 The next stage was to estimate the sectors in which these additional jobs were likely to be. Three approaches were taken:

- The first approach was based on the sectoral profile of the CE forecast. The sectors which were forecast to grow in the CE forecast have been adjusted so that overall growth aligns with the demographic-led total employment figure
- The second approach was based on the sectoral profile of the OE MidHigh forecast. This was adjusted in a similar way so that the additional growth reflected the profile of growth sectors in the OE MidHigh forecast
- The final approach was based on the profile of growth taking account of the Local Industrial Strategy. This assumed that the jobs growth will reflect the profile of growth in the Strategy labour demand scenario which was constrained so that overall growth was equal to the demographic-led figure. In this scenario the

additional jobs growth was in sectors which were supported by the LEP's growth targets, rather than just a proportional increase in forecast growth sectors.

2.49 Jobs were then converted to floorspace and the land, hectares using the same approach as for the Labour Demand Model. As Table 7 shows, this generated needs of 44.5-62.5 ha for Stroud District.

Table 7 – Total Employment Land Needs (ha) – Comparison of Labour Supply Scenarios by Local Authority, 2021-41 (2020-40 for Stroud)

| | Labour Supply - CE based | Labour Supply - OE based | Labour Supply - Growth Sectors |
|------------------------|--------------------------|--------------------------|--------------------------------|
| Cheltenham | 29.8 | 38.2 | 38.4 |
| Cotswold | 39.5 | 45.1 | 44.3 |
| Forest of Dean | 13.2 | 16.8 | 22.4 |
| Gloucester | 44.9 | 59.8 | 50.2 |
| <i>Stroud</i> | 44.5 | 45.5 | 62.5 |
| Tewkesbury | 49.3 | 43.5 | 83.8 |
| Gloucestershire | 221.1 | 248.8 | 301.6 |

Source: Gloucestershire Authorities, 2020

Comparison of Scenarios and Conclusions

2.50 The following conclusions are made on the above Scenarios:

- The labour demand scenarios based on the OE and CE forecasts showed growth well below the completions trend and included a net negative need for industrial land which does not reflect market demand. The OE MidHigh and the CE labour demand scenarios showed a level of growth lower than any of the labour supply scenarios. This suggested that planning for this level of growth would likely constrain the employment demand arising from the demographic growth. The labour supply approach was therefore considered a more appropriate measure of future employment land needs
- The labour supply scenarios based on the CE and OE forecasts identified very low future needs for industrial (E(g)(iii)/B2) land – around 45 ha across Gloucestershire. These forecasts did not reflect the strong recent performance seen in key growth sectors of Advanced manufacturing, Energy, and Cyber security and related IT services
- The labour supply growth scenario was modelled on the profile of jobs growth shown in the growth forecast assuming a strong 10-year performance in the growth

sectors. These sectors generally occupy B Class employment sites, and as such the higher jobs growth in these scenarios translated to considerably higher employment land requirements. This results in a need for 124 ha of E(g) (iii)/B2 industrial land across the county. However, this was lower than the 140 ha identified in the labour demand growth scenarios

- The range across the scenarios for E(g) (i/ii) and B8 uses was less significant with the labour supply scenarios sitting in the mid-point of the range.

2.51 The **labour supply growth scenario** was therefore considered to provide a realistic yet positive estimate for future employment land needs in Gloucestershire. *“It aligns with demographic growth and takes account of recent growth trends, stakeholder feedback, and the LEP’s Local industrial strategy. It is therefore considered to provide a positive basis for planning to ensure that future business needs of Gloucestershire are provided for. The labour demand growth scenario provides a slightly higher figure which would support the continued growth in key sectors of the Gloucestershire economy and support the aims of the GFirst LEP and Local Industrial Strategy.”* The preferred needs scenarios are set out in Table 8.

Table 8 – Preferred Scenario Outputs, Hectares

| Use Class Scenario | E(g) (i/ii) | | E(g) (iii)/B2/B8 | |
|------------------------|----------------------|------------------------|----------------------|------------------------|
| | Labour Supply Growth | Labour Demand Growth 1 | Labour Supply Growth | Labour Demand Growth 1 |
| Cheltenham | 22.9 | 26.2 | 15.4 | 17.6 |
| Cotswold | 19.7 | 23.5 | 24.6 | 28.6 |
| Forest of Dean | 3.1 | 2.9 | 19.3 | 19.0 |
| Gloucester | 31.1 | 33.7 | 19.2 | 19.9 |
| Stroud | 18.0 | 20.9 | 44.4 | 50.8 |
| Tewkesbury | 20.7 | 23.0 | 63.1 | 75.5 |
| JCS Area | 74.7 | 82.9 | 97.7 | 113.0 |
| Gloucestershire | 115.5 | 130.2 | 186.0 | 211.4 |

Source: Gloucestershire Authorities, 2020

2.52 The recommended total employment land requirement for Stroud District was therefore 18-20.9 ha of E(g) (i) and (ii), land and 44.4-50.8 ha of E(g) (iii)/B2/B8 land. A combined need of **62.4-71.7 ha**.

Gloucestershire LEP Strategic Economic Plan (SEP), 2018

- 2.53 This non-statutory document set a series of Strategic Policies for the LEP and refreshes and analyses those of the 2014 SEP. The most significant of these for Stroud District being support for the Gloucestershire Renewable Energy, Engineering and Nuclear Skills Centre (GREEN) which opened in Berkeley in September 2017.
- 2.54 The County’s economic position was analysed based on a series of strengths, weaknesses, opportunities and threats, of which the high-level points can be seen in Table 9.

Table 9 – SWOT analysis for Gloucestershire

| Strengths | Weaknesses |
|---|---|
| <p>Emerging Cyber specialism: sector and skills</p> <p>GCHQ & proposed National Cyber Innovation Centre in Cheltenham</p> <p>Above average number of businesses are ‘innovation active’</p> <p>Excellent countywide access to business support via The Growth Hub network</p> | <p>Failure to attract and/or retain enough talented young people</p> <p>Under exploited export potential</p> <p>Capacity Constraints in the highways network:</p> <ul style="list-style-type: none"> • M5 J10 (a restricted junction) • A417 – The ‘Missing Link’ • M5 J9/A46 (junction at capacity in peak hours) • A40 to west of River Severn • A40 between Cheltenham and Gloucester centres |
| Opportunities | Threats |
| <p>Cyber security sector of international significance</p> <p>Cross LEP working within key sectors, particularly Cyber</p> <p>Productivity growth improvements</p> <p>Employment and Skills Board strengthening partnerships between education and business</p> | <p>Uncertainty surrounding the impact of BREXIT to the economy locally as well as nationally</p> <p>Lack of suitable premises for high value businesses</p> <p>Businesses unable to fill skilled vacancies</p> <p>Skills gaps and shortages in some sectors</p> |

Source: Gloucestershire ENA Draft Report, 2020

Gloucestershire LEP Draft Local Industrial Strategy (LIS), 2019

- 2.55 The aim of this document was to show a strategy for increasing economic productivity in the County and to guide funding investments. The County’s existing industrial strengths, and therefore foci for growth, included:
- Manufacturing

- Aerospace
- Agri-tech
- Cyber-tech
- Green Growth.

2.56 Two significant barriers to this growth were people and connectivity. The County must work to attract and retain a workforce of talented and skilled people, along with addressing issues of housing, competition from elsewhere and training/education. These issues will be addressed to ensure a workforce of local skills to meet local business needs. Additionally, improving physical connectivity via cycle links, rail projects and innovative transport solutions will help to improve the sub-region's connectivity.

2.57 Sharpness Eco Village (Sharpness New Settlement) was identified as one of Gloucestershire's three future garden towns and villages. These *"will put green energy and green construction at the heart of their design."* *"The Sharpness Eco Village in Stroud will offer sustainable transport links, green infrastructure and both walking and cycle routes for up to 5,000 sustainable houses."*

The Assessment of Strategic Development Opportunities in Cheltenham Borough, Gloucester City, Tewkesbury Borough, Stroud District and Parts of Forest of Dean District, 2020

2.58 This assessment informed the search for suitable and available strategic development land beyond the existing settlement boundaries, helping to identify development options to meet needs and will feed into the Stroud Local Plan. It was noted that Green Belt land was included as the aim of the study was to identify areas with potential suitability for development. It was not treated as a constraint to development. This work will help in identifying the most suitable locations for future strategic housing growth within the areas up until 2040.

2.59 An Interim report was released in late 2019 to time in with the draft Stroud Local Plan. This was vital as a key issue was the relative merits of meeting a proportion of housing needs originating in Gloucester City within Stroud District, as they could not be accommodated within Gloucester City. The final report built upon the Interim findings.

2.60 Initially a high level review was undertaken to remove parts of the Study Area that did not require further consideration in respect to their development potential. This involved a review of:

- The primary environmental constraints to development
- The accessibility to key services
- Travel to work patterns
- Infrastructure constraints
- Viability.

2.61 GIS was used to identify potentially developable land, with anything less than 5 ha disregarded and any areas within 100 metres of each other merged. 55 'Assessment Areas' were established as the primary units for the assessment of development options, each categorised for potential of either becoming urban extensions or a new settlement. The study did not draw conclusions for which areas are most suitable overall for development, as this matter is reserved for further consideration in the individual Local Plans and JCS.

2.62 21 areas fell fully or partly within Stroud District. Table 10 shows each area along with a comment on overall viability the area for the development of various number of dwellings. As seen, all areas had a medium and/or high ranking of viability.

Table 10 – Assessment Areas within Stroud District

| No. | Name | Development Typology | Size (ha) | Viability | | |
|-----|------------------------------------|----------------------|-----------|---------------------------------------|------------------------------------|---|
| | | | | Small Extension (500-2,500 dwellings) | Medium Extension (3,500 dwellings) | Large Extension (4,500-5,000 dwellings) |
| 31 | East of Gloucester | Urban Extension | 288 | Medium | Medium | Medium |
| 32 | South of Gloucester | Urban Extension | 692 | Medium | Medium | Medium |
| 36 | South of Gloucester (Quedgeley) | Urban Extension | 521 | Medium | Medium | Medium |
| 43 | North of Stonehouse | Urban Extension | 495 | High | High | High |
| 44 | East of Stroud | Urban Extension | 41 | High | ~ | ~ |
| 45 | North of Stroud | Urban Extension | 25 | High (500-1,000) | ~ | ~ |
| 47 | Land East of Frampton on Severn | Urban Extension | 688 | High | High | Medium-High |
| 50 | Land North East of Cam and Dursley | Urban Extension | 696 | High | High | High |

| 51 | Land North West of Cam | Urban Extension | 223 | High | ~ | ~ |
|----|--|-----------------|-------|------------------------------------|------------------------------|---------------------------|
| | | | | Viability: | | |
| | | | | Small Village (2,500-4,500) | Large Village (7,500) | Town/City (10,000) |
| 37 | Southwest of Gloucester | New Settlement | 972 | High | High | Medium-High |
| 39 | South of Gloucester (A4173 corridor) | New Settlement | 316 | High | High | N/A |
| 40 | South of Gloucester (East of M5) | New Settlement | 548 | High | High | Medium-High |
| 41 | South of Gloucester (West of M5/ A38 corridor) | New Settlement | 851 | High | High | Medium-High |
| 42 | Land at Overton | New Settlement | 431 | High | High | Medium-High |
| 46 | Land South West of Stonehouse | New Settlement | 423 | High | High | Medium-High |
| 48 | Land at Frocester and silver Street | New Settlement | 998 | High | High | Medium-High |
| 49 | Land at Slimbridge and Cambridge (West of M5) | New Settlement | 781 | High | High | Medium-High |
| 52 | Land North of Berkeley | New Settlement | 2,228 | High | High | Medium-High |
| 53 | Land South of Berkeley | New Settlement | 2,500 | High | High | Medium-High |
| 54 | Land Between M5 and North Nibley | New Settlement | 792 | High | High | Medium-High |
| 55 | Land at Kingswood | New Settlement | 1,422 | High | High | Medium-High |

Source: Tewkesbury BC, Gloucester CC, Cheltenham BC, Stroud DC and Forest of Dean DC, 2020

- 2.63 Overall findings were discussed in relation to the five bullet points above. Several areas have the potential to accommodate development at all potential scales with minimal impacts on ecological assets, including Assessment Area 43 – Urban extension North of Stonehouse. However, assessment areas in Stroud District were noted as having the highest potential impacts on water quality.
- 2.64 Due to the nature of the land in the assessment areas, most were identified as having moderate-high landscape sensitivity. Positively, five assessment areas in Stroud – 37, 47, 49, 52 and 53 – were noted as having the potential to accommodate small villages of 1,500-5,000 dwellings with no more than moderate adverse effects on the landscape. Additionally Area 43 noted moderate-low effects for small-medium urban extension options.

- 2.65 Transport in the majority of the assessment areas has been identified as having some/ significant congestion/capacity issues. Greater capacity in the road network has been identified in areas 51 and 52, around Cam and Berkeley, however the accessibility to employment opportunities in these locations is relatively poor and any residential development may contribute to unsustainable travel patterns. Only area 32, South of Gloucester was noted as having spare capacity in the road network. Areas 31, 32, 36 and 37 have a primary relationship with Gloucester with regard to accessibility, as do areas with good access to a station in the south (i.e., within the vicinity of Cam station). The remaining areas within Stroud District have a stronger relationship to Stroud than Gloucester, and therefore development should look to strengthen the relationships with the settlements which each area is closest to.
- 2.66 The conclusion for deliverability overall was that the urban extensions are more likely to be deliverable than new settlements. Areas 39 and 49 were the only two instances at the largest scale of development (new settlements of over 10,000 dwellings), where the delivery of drinking water infrastructure is not considered a fundamental constraint to growth.
- 2.67 Overall, for both urban extensions and new settlements, viability was higher around the key settlements including Stroud, with the highest levels of viability present in the assessment areas in Stroud District, along with Tewkesbury and Cheltenham Boroughs.

Local

Stroud District Local Plan, 2015

- 2.68 The District Local Plan was adopted in November 2015. Strategic Objective SO2: Local economy and jobs aims to *“Providing for a strong, diverse, vibrant local economy that enables balanced economic growth, coupled with enhanced job opportunities across the District.”*
- 2.69 The Plan intended that Stroud District would accommodate at least 11,400 additional dwellings and 58 ha of additional employment land for the period 2006-2031. Employment development would be focused at a small number of large sites close to the M5/A38 and Stroud and integrated with housing opportunities. *“It will create the*

opportunity to provide a range of units from large warehousing and distribution units down to offices and smaller industrial units, possibly as start-up businesses.” An aspiration for employment growth was to achieve the creation of two new jobs for every home that gets built.

2.70 Relevant strategic sites are identified at the following locations:

- SA4a: Quedgeley East - 13 ha
- SA3: North East Cam -12 ha (450 homes)
- Sharpness –17 ha (300 homes) including SA5: Sharpness Docks – 7 ha and SA5a: South of Severn Distribution Park – 9.8 ha
- Stroud Valleys – Intensification of employment uses (450 homes)
- SA2 West of Stonehouse –10 ha (1,350 homes).

2.71 These strategic employment sites are reviewed in this Study.

2.72 Delivery Policy EI1: ‘Key Employment Sites’ identified 36 developed employment areas to be protected for E/B-Class uses. Delivery Policy EI2: ‘Regenerating Existing Employment Sites’ identified a further nine locations where regeneration for mixed-use development, including employment generating uses would be permitted. Policy EI2a: ‘Former Berkeley Power Station’ identifies that this *“site will be retained for B1 [E(g)]-B8 employment uses and for employment related training and education purposes and for operations and uses associated with the decommissioning of the nuclear power station. Redevelopment for unrelated alternative uses will not be permitted.”* This Study reviews these 46 employment areas.

2.73 Delivery Policy EI3: ‘Small employment sites (outside identified employment areas)’ noted that such small sites *“will be protected from non-employment uses such as housing unless wholly exceptional circumstances can be demonstrated by the applicant. Small freehold employment development plots for owner occupiers will be supported.”*

2.74 Delivery Policy EI4: ‘Development on existing employment sites’ in the countryside allowed the extension of buildings and the provision of new buildings, including infilling between existing buildings, provided that:

- *“The proposal facilitates the retention or growth of local employment opportunity*

- *The proposal would not cause an unacceptable visual impact on the local character in terms of its siting, scale, materials or site coverage*
- *There are no suitable alternative buildings or sites that can be used adjacent to the site or locality*
- *The proposal can avoid harm to local amenities and adjoining land uses*
- *The proposal would not generate significant traffic movement and volume that would lead to unacceptable environmental impacts or detriment to road safety.*
- *Proposals will be expected to include measures to secure environmental improvements such as landscaping, enhancing biodiversity and incorporating SuDS.”*

2.75 Delivery Policy EI5: ‘Farm enterprises and diversification’, allowed such diversification where it will *“stimulate new economic activity with a use compatible with its location, which maintains the relative sustainability of a rural area including the rural-urban fringe.”*

Stroud District Local Plan Review: Draft Plan for Consultation, 2019

- 2.76 The new Stroud District Local Plan will identify the growth and development required to meet local needs to 2040, with the intention to adopt the new Local Plan by the end of 2022. Regarding employment, the draft plan aimed to:
- *“Provide for job opportunities across the District, with a focus on knowledge based industries, environmental technologies, engineering and manufacturing, creative industries and high quality social care*
 - *Rebalancing and regenerating the existing employment stock to secure modern office premises with business support services and freehold small industrial sites.”*
- 2.77 The Draft Plan’s development strategy proposed economic growth and additional jobs on and adjacent to existing high value employment sites and within the M5/A38/rail corridor; new employment sites of varying sizes and locations to meet the specific locational requirements of different sectors; and new employment together with new housing to create sustainable communities and to reduce the potential for further out commuting. There were opportunities identified for developing new modern business park premises at Quedgeley East and at Stonehouse and for growing Green technologies at Berkeley-Sharpness.

2.78 The employment supply up to 2040 was calculated at 34.3 ha, whilst there was a minimum further requirement of 14.4 ha based upon past take up rates, although it was recognised that further work was required to identify future land requirements. The latest job forecasts were reported as suggesting a need to plan for between 2,300 and 6,300 net new jobs by 2040.

2.79 Core Policy CP2: 'Strategic growth and development locations' identifies that Stroud District will accommodate at least 12,800 additional dwellings, and at least 50 ha of additional employment land to meet the needs of the District for the period 2020-2040. Strategic development sites to meet the employment needs are to be allocated at the following locations:

- PS19a: Stonehouse North West - 5 ha (650 homes)
- PS20: Stonehouse - Eco Park M5 J13 –10 ha
- PS32: Quedgeley East Extension – 5 ha
- PS36: Sharpness – 10 ha (2,400 homes (5,000 by 2050))
- PS37: Wisloe – 5 ha (1,500 homes)
- PS43: Javelin Park – 9 ha
- PS47: Renishaw New Mills –10 ha
- SA5: Sharpness Docks – 7 ha (300 homes).

2.80 Again, these sites are reviewed in this Study. Delivery Policies EI1-5, as noted previously, were retained in this Draft Plan with minor amendments.

Strategic Assessment of Land Availability (SALA), 2017-2020

2.81 These annual reports provided an assessment of land availability within Stroud District for various uses including employment. This supply was measured against the adopted Stroud Local Plan employment land target of 58 ha between 2006-2031, or 2.3 ha per year. Taking into account sites with planning permission and those in accordance to Local Plan policy. 32.83 ha of employment land was identified in the 2015 Local Plan within five strategic locations. These were:

- West of Stonehouse
- North East Cam
- Quedgeley East
- Sharpness Docks
- Severn Distribution Park.

- 2.82 Overall, in 2017 an employment land supply of 79.17 ha for 2006-2031 was calculated, exceeding the Local Plan target by 21.17 ha. However, there was also a potential employment land loss of 11.0 ha, reflecting extant planning permissions and other commitments, as of 2017.
- 2.83 SALA was updated in 2018, 2019 and 2020. To 2031 a total employment land supply of 77.13 ha was identified in 2018, increasing slightly to 77.61 ha by 2020. Against the Stroud Local Plan requirement of 58 ha, this gave surpluses of 18.13 ha in 2018, increasing to 19.61 ha in 2020. However, there was also a potential loss of 8.90 ha of E(g)/B2/B8 employment land in 2018, increasing to 17.39 ha in 2020, from planning permissions/ other commitments. Table 11 identifies the employment land supply, as set out in the latest 2020 SALA.

Table 11 – Potential Employment Land Supply with Current Policy Requirements, 2020

| Type of Employment Potential | 2006-2020 | 2020-2031 | 2006-2031 |
|---|-----------|-----------|---------------|
| Completions | 32.30 | - | 32.30 |
| Losses | (28.44) | - | (28.44) |
| Commitments | - | 50.74 | 50.74 |
| Local Plan Allocated Sites | - | 8.40 | 8.40 |
| Sites without permission within settlements | - | 14.61 | 14.61 |
| Total employment land supply | 3.86 | 73.75 | 77.61 |
| Stroud Local Plan Requirement | | | 58 |
| Shortfall/Surplus against Plan Requirement | | | +19.61 |
| Potential Losses | | | (17.39) |

Source: SDC, 2020

- 2.84 In total, SALA reports 2017 to 2020, identified 28 sites outside settlements which were considered to have future potential for additional employment.

Employment Land Availability in Stroud District 2012-2020

- 2.85 All District Councils in Gloucestershire undertake annual surveys of available employment land. This data then acts as monitoring evidence to inform future local plans. Reports from 2012 and 2013 measured supply against a requirement of 100 ha of employment land set by the Gloucestershire Structure Plan for 1991-2011. The

reports of 2014-2019 break down the supply by B class use against a Local Plan requirement for the period 2006-2031 of 58 ha. All years showed a surplus of land as displayed in Table 12.

Table 12 – Employment Land Supply, 2012-2020

| Year | Requirement (ha) | Net Land Supply (ha) | Total Surplus (ha) |
|--|------------------|----------------------|--------------------|
| Structure Plan – Total Employment Land Supply | | | |
| 2012 | 100 | 103.39 | 3.39 |
| 2013 | 100 | 114.98 | 14.98 |
| Local Plan – Total B Class Use Supply | | | |
| 2014 | 58 | 82.54 | 24.55 |
| 2015 | 58 | 93.85 | 35.85 |
| 2016 | 58 | 72.69 | 14.69 |
| 2017 | 58 | 64.66 | 6.66 |
| 2018 | 58 | 61.52 | 3.52 |
| 2019 | 58 | 62.58 | 4.58 |
| 2020 | 58 | 63.04 | 5.04 |

Source: Employment Land Assessment, 2012-2020

- 2.86 It can be seen that the total net additional supply of E/B-Class employment land has been reducing in the last few years, however, it still remains above the Local Plan Requirement of 58 ha.

Stroud District Employment Land Study, 2013

- 2.87 This report assessed the demand, supply and need for employment land and premises in Stroud District to 2031, to inform the current Local Plan. It was produced by BE Group and Aecom.
- 2.88 In terms of the market assessment, it was identified that District’s industrial property market sub-divides to three key geographies. Two are associated with the M5 corridor – Junction 12 (Quedgeley) and Junction 13 (Stonehouse). These were a focus for sub-regional and modern space demand. The third was Stroud Valleys, where the very many former mill buildings cater for indigenous start-ups and ‘grow-on’ space. However, the continuing loss of such mills to non-employment uses was considered a negative impact on the supply of business incubation space and on future business start-ups.

- 2.89 The office market was small, with demand very much locally sourced. Stroud did not compete with the more established, substantial markets of Gloucester, Cheltenham and North Bristol. Modern space provision was limited, with only Stonehouse Park delivering an appropriate offer.
- 2.90 Private sector commercial property agents reported that companies already established in the District mostly look for moderate quality industrial space. Requirements were greatest for large units of 2,001-5,000 sqm, and for freehold properties. This presents a challenge as much of the existing stock and development opportunities are geared to leasehold transactions. Office demand was predominately local and for premises of less than 500 sqm. There was a paucity of good quality office space available within the District.
- 2.91 36 employment areas were reviewed totalling 283 ha. Of this, 36.5 ha (12.5 percent) was identified as representing options for the future change of Stroud's land supply. 23.3 ha of this was associated with Quedgeley East Business Park.
- 2.92 As of March 2012, there was a supply of 57.91 ha of employment land from 24 sites. These sites were mainly in the west of the District, around Sharpness/ Cam/ Dursley, with a reasonable supply at Stonehouse. The District lacked any immediately available land, although 18 percent of the supply (10.53 ha) could be made available in a few years.
- 2.93 In terms of land needs, an additional 34.6 ha was required based on past take-up rates. The other forecast models (employment, labour supply and the 'policy on' scenario) suggest the District had a significant oversupply of employment land (see Table 13). This would suggest that much of the 2012 land supply was surplus to requirements and could be used for other activities. However, these methods took no account of pent-up demand, failures in the property market or need for a range of sites and locations to provide companies with choice; a five year buffer to ensure a continuum of supply beyond the Plan period.

Table 13 – Land Need Forecasts, All Models

| Model | Land Need, ha 2012-2031 (including 5 years buffer) | Predicted Surplus (shortfall) to 2031 Perceived Supply (57.91 ha) | Predicted Surplus (shortfall) to 2031 Residual Supply (32.78 ha) |
|-------------------------------|---|--|---|
| Historic Land Take-up Rate | +67.44 | (9.53) | (34.66) |
| Employment Based | +10.86/ +14.81 | 43.10/ 47.05 | 17.97/ 21.92 |
| Labour Supply | +16.31/ +16.69 | 41.22/ 41.60 | 16.09/ 16.47 |

Source: BE Group, 2012

2.94 The main recommendations made were:

- Allocating a further 36.5 ha of employment land for the period 2012-2031 (the additional land requirement increased to this when adjustment is made to achieve a market equilibrium rate of 7.5 percent of total floorspace stock)
- Review the Regeneration Opportunities identified to meet needs and, to help meet the full requirement, the Council should consider new allocations at Quedgeley East, north of Stroudwater Industrial Estate, Stonehouse, and an extension to Severn Distribution Park
- 11 key employment areas should be safeguarded for E/B-Class use/ other employment uses
- For Stroud's other allocated employment areas and land/premises plus nine additional sites identified through this study, a more flexible approach could be taken to help facilitate a broad range of economic development. In some cases, a more intensive mixed-use development could provide greater benefit to the local community than if the site was retained solely in employment use
- However, Stroud Council should continue to protect employment sites (including single standalone employment sites outside employment areas) from non-employment uses, such as housing or retail, unless wholly exceptional circumstances can be demonstrated. If employment sites (allocations) are lost to other uses, then an equivalent amount of land should be identified elsewhere to ensure a sufficient overall land supply in Stroud
- The Council should undertake research to identify the scale and location of unused or underused mill floorspace within the District, in order to identify the constraints or opportunities associated with bringing such space to the market
- The Council should address the lack of modern office premises with associated business support services by examining the feasibility and viability of creating

a business incubator/serviced offices facility to be located within its unused floorspace at Ebley Wharf

- Given the strength of continuing demand for freehold industrial units there should be sites set aside to provide small freehold development plots for owner-occupiers. As such, delivery is more likely where land is in public sector ownership, it was recommended consideration is given to provision on part of the County Council owned land at Stonehouse.

Stroud Employment Assessment Review, November 2014

2.95 This report addressed the comments raised by the Inspector regarding the Employment Land Study, produced in 2013. It was also produced by BE Group. It aimed to address six key issues with the report:

1. Is the study compliant with national guidance?
2. Is the approach consistent with the approach taken by the JCS authorities?
3. Is the Policy in the Local Plan and the Strategic Employment Plan consistent?
4. Is replying on historic land take up an appropriate approach?
5. Are the allocated sites still appropriate and deliverable?
6. Does forecasting data reflect latest growth figures?

2.96 Regarding bullet 4: The different forecasting methods were reviewed and compared, however historic take up trends were chosen to be used as, in view of the market assessment, it was considered other methods did not reflect the projected active local market in Stroud.

2.97 Regarding bullet 5: The ELS identified a need up to 34.66 ha and the Draft Local Plan included new allocations of 25.00 ha to meet this shortfall. Additionally, numerous employment areas were protected to retain employment uses and others re-designated as mixed-use sites, including employment. The Council revised its monitoring, to take into account new allocations and commitment. Therefore, the total net land supply, taking account of completions since 2006, is 51.83 ha, which was considered available and deliverable for the Local Plan period.

2.98 Regarding bullet 6: The forecasting methods were updated to take into account 2014 land availability, adjustments to forecasting data and the interpretation of relationship between employment growth and consequent land needs. The findings showed no immediate need to allocate further land.

Neighbourhood Plans

- 2.99 Eight made plans have been reviewed:
- Dursley (2019)
 - Eastington (2016)
 - Hardwicke (2017)
 - Kingswood (2017)
 - Minchinhampton (2019)
 - Stonehouse (2018)
 - Stroud Town Centre (2016)
 - Whiteshill and Ruscombe (2016).
- 2.100 Also considered are the Cam (2020) and Horsley (2019) Neighbourhood Plans, which have both passed examination but were not subject to referenda in 2020 because of restrictions associated with the Covid-19 Pandemic.

Cam Parish Neighbourhood Development Plan 2019 – 2031 (Referendum Version, 2020)

- 2.101 The document has three Objectives for employment:
- *“O13 Protect existing employment sites in the Parish*
 - *O14 Encourage provision of high quality employment space for start-up, small and medium sized businesses, allowing flexibility for businesses to start, grow, and stay in Cam.*
 - *O15 Encourage house builders to build with home office workers in mind and developers to include fibre broadband networks as part of their designs.”*
- 2.102 Cam is identified as a focus for strategic growth in Stroud. Local Plan policy CP2 allocates 12ha of employment land (providing up to 1500 jobs), and 450 dwellings at the North East Cam urban extension (Site Allocation SA3). Future development in Cam will be of a strategic nature and to come forward through the current and next Stroud District Local Plan.
- 2.103 There were two designated employment sites in Cam in the 2015 Stroud Local Plan: Cam Mills and Draycott/Middle Mill Industrial Estate. The Village centre is a District Centre where the vitality and viability and the existing range of uses should be

maintained and enhanced, promoting the range of employment opportunities available for people in Cam.

- 2.104 The Neighbourhood Plan seeks to promote opportunities for different types of businesses in the Parish. There is evidence that more young people between 15-24 move out of the Parish than into the Parish (ONS 2010), affecting the work force and skills base within Cam. The Neighbourhood Plan looks to address this by encouraging the development of small and/or start-up businesses which may operate from smaller premises or from home.
- 2.105 Policy CAME1 Encouraging Startup, states that “*New Businesses and Home-working Provision of local employment and the establishment of new start-up businesses, and development and alterations to provide spaces for home working will be supported, subject to an assessment of the impact of the proposals on:*
- I. *Residential amenities*
 - II. *The transport network and parking conditions*
 - III. *Biodiversity and the environment.*”

Dursley Neighbourhood Development Plan, 2018-2031

- 2.106 The document aims to aid development which would support the local economy and encourage new start-up businesses (Planning Policies E1 and E2). Employment has changed significantly in the town in recent years as manufacturing companies have been relocating out of the town and agricultural activity has reduced. This has resulted in a reduction in the total number of businesses. Littlecombe Business Park was listed as a ‘Key Employment Site’ in the 2015 Local Plan and was therefore protected from change of use to non E/B-Class uses.
- 2.107 To help the local economy to thrive once more, start-up businesses will be encouraged within the town subject to no adverse impacts found on the residential community, transport network or the environment (Policy E2). This is supported at the LEP level and the Stroud District jobs and growth plan, with recognition that ‘*small businesses are the most significant sector within Dursley*’ and local economic analysis emphasises a focus on manufacturing, retail and tourism.
- 2.108 The Town Council is keen to reverse losses in employment and strengthen opportunities for local people, also known as Project A.

Eastington Parish Council, Neighbourhood Development Plan, 2015-2031

2.109 This document aims to support small scale employment opportunities as well as providing support for those working from home. Around 22 percent of the workforce leave the area for employment and therefore local employment opportunities need to be developed. Two areas of employment land within the Parish were identified in the 2015 Local Plan – Meadow Mill Industrial Estate and West of Stonehouse.

2.110 Any additional employment development will be subject to Policy EP6, which states that employment development proposals should be supported subject to *“there being no significant adverse impact on neighbouring properties, or the locality in general.”* The conversion of existing dwellings to provide space for home-working and the conversion of disused agricultural and other rural buildings for small business use will be supported.

Hardwicke Parish Council, Neighbourhood Development Plan, 2015-2031

2.111 *‘To support the development and sustainable growth of rural business in Hardwicke’* is an objective for the Parish, however the 2015 Local Plan identified sufficient employment land within the Parish to meet needs. Any employment development therefore could be accommodated within existing employment sites, according to Policy EC1.

Horsley Neighbourhood Development Plan, 2019 – 2040

2.112 Horsley Village has a limited employment role and high levels of self-employment and home-working. The two main employers within the Parish are Ruskin Mill College and Barton End riding stables. In addition, there is significant agricultural diversification at Hay Lane farm, supporting joinery workshops and stone working.

2.113 Key Neighbourhood Plan policies include:

- *“Policy B1 Proposals that increase opportunities for residents to work from home (such as a home office for remote working) and/or to work from within the parish will be supported, if planning permission should be required, as long as they do not conflict with other policy in this Plan.*
- *Policy B2 Where commercial space at residential properties is required, support will be given to proposals for small scale, proportionate residential extensions or modest conversions of existing buildings in the gardens of residential properties where the express purpose is to provide B-class*

commercial space from which to operate a business or workshop. Such proposals will only be considered if they can clearly demonstrate that the work area for its occupants; is ancillary to the primary residential use; that the commercial activity is appropriate in terms of amenity to residential neighbours; Includes measures to reduce the impact of traffic generation, noise and odours; does not conflict with other Plan policy.

- *Policy B4 To help local farmers and landowners to sustain the economics of farming businesses, by means of diversification, through change of use of disused agricultural buildings, applications where planning permission is required will be supported where they can demonstrate that:*
 - *There is no significant traffic generated causing problems of access on narrow lanes*
 - *The visual impact and noise or disturbance is acceptable*
 - *The activity befits the rural setting within the AONB*
 - *There is no conflict with other policy in this Plan.”*
- *Policy A3 Proposals for a ‘co-working hub’ will be supported within the settlement boundary for the change of use of an existing building, or on previously developed land (subject to Policy B2), if there is evidence of demand through researched study and subject to general HNDF guidelines.”*

Kingswood Neighbourhood Development Plan, 2014-2031

2.114 An objective for the community, relating to employment is ‘*To support business development and employment opportunities within the Parish*’.

2.115 The 2015 Local Plan recognised the need to protect its existing business/ sector strengths, with four key employment sites in Kingswood safeguarded for E/B-Class uses:

- Renishaw New Mills
- Renishaw Charfield Works
- Abbey Mills Industrial Area
- Orchestra Works.

2.116 Policy BE1 wishes to protect and encourage employment opportunities and uses within the Parish whether through the conversion of existing buildings or creation of new schemes. These will be supported provided that negative impacts on neighbouring

properties, on the local and rural character and significantly increased traffic congestion can be avoided.

2.117 Due to the rural nature of the Parish, the conversion of disused agricultural/ other rural buildings will be supported for small business use under Policy BE3. So will businesses wishing to operate from home, including conversion of part of a dwelling for business use.

Minchinhampton, Neighbourhood Development Plan, 2018-2036

2.118 Policy MP Emp1 supports “*the conversion of disused agricultural and other rural buildings of traditional sound construction for small business use*”.

2.119 The majority of local jobs are provided by small employers and self-employment. The popularity of homeworking has increased nationally due to advancements in technology. Policy MP Emp2 supports development proposals for conversion of dwellings/ creation of extensions for E/B-Class uses, subject to no adverse impacts to residents or the surrounding area.

Stonehouse Neighbourhood Development Plan, 2016-2031

2.120 The aim for employment is ‘*To support employment opportunities and secure a prosperous economic future for Stonehouse*’. Stonehouse contains almost a third of the District’s commercial floorspace, predominantly found in Stonehouse Business Park. This location along with four others (Bonds Mill Industrial Estate, Upper Mills Industrial Estate, Oldends Lane Industrial Estate and Ryeford Industrial Area) are safeguarded as employment sites in Policy EM1.

2.121 Policy EM3 supports small development of ‘hot-desk’ or incubator space in order enable the start-up and growth of small and medium sized businesses. Also, communication infrastructure improvements will be supported under Policy EM4 to produce viable locations for successful businesses to reside in.

2.122 Priority projects for employment in Stonehouse include:

- *‘Expansion/ intensification of existing employment to ensure Stonehouse maintains its commercial attractiveness, particularly to uses other than B8*
- *Developing schemes for local employability, linking local employers to skills and employment training for local residents*
- *Assist the establishment of flexible serviced/ managed co-working space’.*

Stroud Town Centre Neighbourhood Development Plan, 2015-2035

2.123 A key theme of the plan is sustaining the town centre economy. Whilst this relates to tourism and retail, it also *'welcomes and supports new and existing businesses and provides a good range of high-quality accommodation in which businesses can establish and grow'*. Policy AP1 supported new development which will retain/ increase the number of jobs and:

- *'Enhance the vitality and viability of the designated core zone by utilising vacant floorspace*
- *Form part of a mixed use development*
- *Provide opportunities for skills development especially for young people.*

2.124 Some specific development sites have been included in the Plan such as Fromeside Industrial Estate (Policy ZP2c). Whilst this estate did provide useful services, they are low-intensity uses and do not take full advantage of the setting of the restored canal. This policy supports the intensification of employment on site, and any new buildings which show a well-designed frontage onto the canal. Commercial development will also be welcome in the Merrywalks Area (Policy ZP4c).

Whiteshill and Ruscombe Neighbourhood Development Plan, 2015-2031

2.125 For employment, the Parish aims to *"Encourage and support enterprise development and opportunities for employment in the Parish"*. The economy within the Parish is mainly farming along with construction companies, livery stables and other small rural businesses which provide a variety of services.

2.126 Support will be given to enterprise development that do not have an adverse effect upon the character, infrastructure or environment of the area according to Policy LE1. The majority of the workforce are employed within the service industry and travel out of the Parish for work due to minimal opportunities in the villages, although the numbers of self-employed and working from home are above the national averages.

Summary

2.127 The Gloucestershire-wide ENA identified a strong industrial market along the M5 Corridor, including Junctions 12-13 in Stroud District. A sizable supply of older

floorspace in the Stroud Valleys weakens new build demand elsewhere in the District, although industrial vacancy rates of 10.5 percent, as of 2019/20 at least, suggest Stroud District was not significantly oversupplied with industrial premises. Although county office demand remained somewhat focused in Gloucester and Cheltenham, most new build development has taken place outside of these centres, including at Quedgeley/Junction 12, M5 while Gloucester was losing stock to residential conversions. Since 2011 at least, Stroud District saw the largest amount of office development in Gloucestershire, when measured on an annual basis.

2.128 After reviewing eight scenarios the ENA identified Stroud District's employment land requirements, to 2040, to be 18-20.9 ha of E(g) (i) and (ii), land and 44.4-50.8 ha of E(g) (iii)/B2/B8 land. A combined need of **62.4-71.7 ha**.

2.129 In September 2020, changes in the Use Classes Order combined A and B1 uses into a new E- Class Use. Permitted Development rights also now allow the conversion of vacant office and industrial properties to housing. For Stroud District, the practical effects of this are likely to include:

- Some conversions of town centre office stock, primarily in Stroud town, although it is not assumed that larger employers will vacate the Town completely. This also supposes a return of demand for retail/other service uses in the Town Centre following the end of the Covid-19 Pandemic and resulting Lockdowns
- Risk of increased retail/service options on out of town office parks although most of Stroud's main Employment Areas provide mostly B2/B8 space which is not affected
- The biggest impacts are likely to be in the Stroud Valleys where the changes would make the conversion of office and light industrial stock to other uses easier. However, this only accelerates existing trends which have seen a lot of older properties converted to retail/trade uses as businesses seek more modern accommodation elsewhere. It may even support regeneration in the Brimscombe and Thrupp areas
- Most recent major losses of industrial stock have been redevelopments rather than changes of use, which would still require consents.

2.130 The Draft Local Industrial Strategy identified five industrial strengths for Gloucestershire and foci for future growth:

- Manufacturing
- Aerospace
- Agri-tech
- Cyber-tech
- Green Growth.

2.131 The adopted 2015 Stroud Local Plan intended that Stroud District would accommodate at least 11,400 additional dwellings and 58 ha of additional employment land for the period 2006-2031. Employment land needs were to be met through the provision of a number of strategic sites which are reviewed in this Study:

- SA4a: Quedgeley East - 13 ha
- SA3: North East Cam -12 ha (450 homes)
- Sharpness –17 ha (300 homes) including SA5: Sharpness Docks – 7 ha and SA5a: South of Severn Distribution Park – 9.8 ha
- Stroud Valleys – Intensification of employment uses (450 homes)
- SA2 West of Stonehouse –10 ha (1,350 homes).

2.132 46 Employment Areas were also identified in the Local Plan, including nine regeneration areas. Again, these are reviewed in this ELR.

2.133 Annual employment land monitoring shows that the total net additional supply of E/B-Class employment land has been reducing in the last few years, however, it still remains above the Local Plan Requirement of 58 ha.

2.134 The emerging Draft Local Plan, 2019 identified that Stroud District will accommodate at least 12,800 additional dwellings, and at least 50 ha of additional employment land to meet the needs of the District for the period 2020-2040. Strategic development sites to meet the employment needs are to be allocated at the following locations:

- PS19a: Stonehouse North West - 5 ha (650 homes)
- PS20: Stonehouse - Eco Park M5 J13 –10 ha
- PS32: Quedgeley East Extension – 5 ha
- PS36: Sharpness – 10 ha (2,400 homes (5,000 by 2050))
- PS37: Wisloe – 5 ha (1,500 homes)
- PS43: Javelin Park – 9 ha
- PS47: Renishaw New Mills –10 ha
- SA5: Sharpness Docks – 7 ha (300 homes).

2.135 These proposed allocations, as well as employment provision in two proposed Garden Villages at Newtown/Sharpness and Wisloe, are also reviewed here.

2.136 Eight Neighbourhood Plans have been 'made' so far in Stroud District, with two others nearing this status subject to referenda. These generally echo the 2015 Local Plan, identifying defined Employment Areas as the focus for economic activity while encouraging some rural diversification to support growing micro businesses and those expanding from homeworking into premises.

3.0 SOCIO-ECONOMIC PROFILE

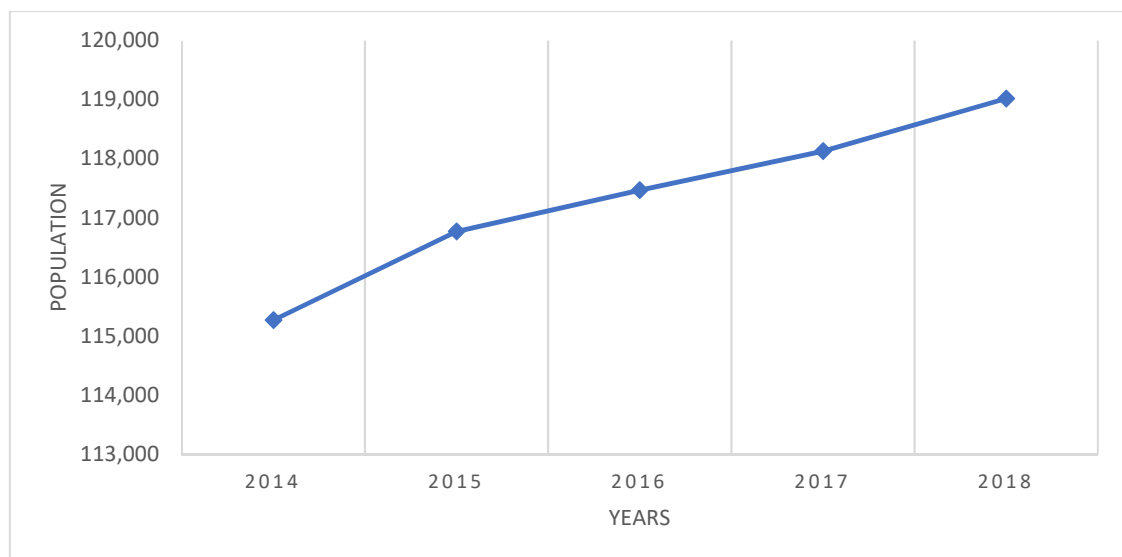
Introduction

- 3.1 This section provides a summary profile of the socio and economic conditions of Stroud District. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the District to facilitate sustainable growth.
- 3.2 Where relevant, data has also been gathered for county, regional and national averages in order to compare performance levels.

Demographic Assessment

- 3.3 The population of the District was 119,019 as of the ONS 2018 Population Estimates. Stroud District represented 2.1 percent of the South West total (5.6 million) during 2018. Figure 3 below shows how Stroud District's population has changed over the last five years, with an increase in population being seen every year. Since 2014 the population has increased by 3.2 percent.

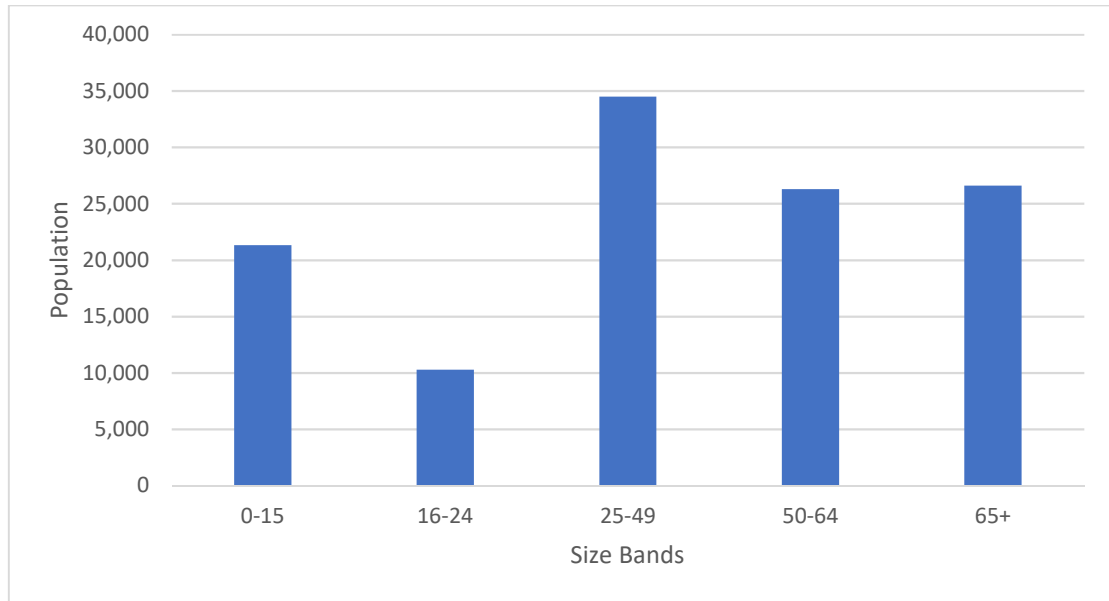
Figure 3 – Population Change, 2014-2018



Source: ONS Population Estimates/ Projections, 2019

- 3.4 The population of 2018 can also be split by age and into several bands, as displayed in Figure 4. 59.7 percent of Stroud District's population comprises working age residents aged 16-64. Residents of 65 and over, who are not likely to be in work, also represent a strong cohort, with 22.4 percent of the total population.

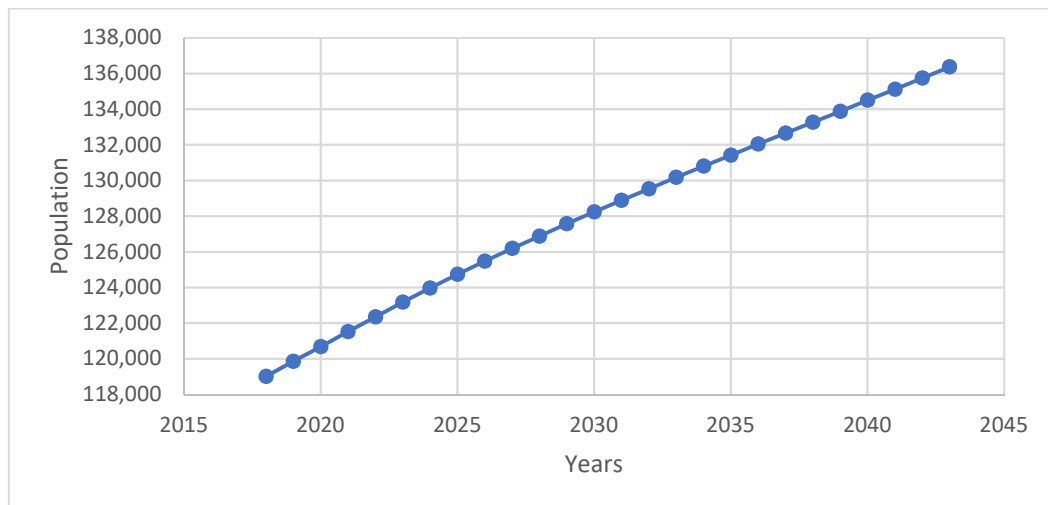
Figure 4 – Population Structure, 2018



Source: *Population Estimates/ Projections, 2019*

3.5 Additionally, it is important to understand the future projections for the population as they will have an impact on jobs growth and thus employment land requirements. Figure 5 shows the forecasted population figures to 2043 based on 2018 population projection figures. It is clear that the population is estimated to increase over the next 25 years, reaching a figure of 136,363 in 2043. This is an increase of 14.6 percent on the 2018 figure, in line with projected population growth in the South West of 14.1 percent, over the same period.

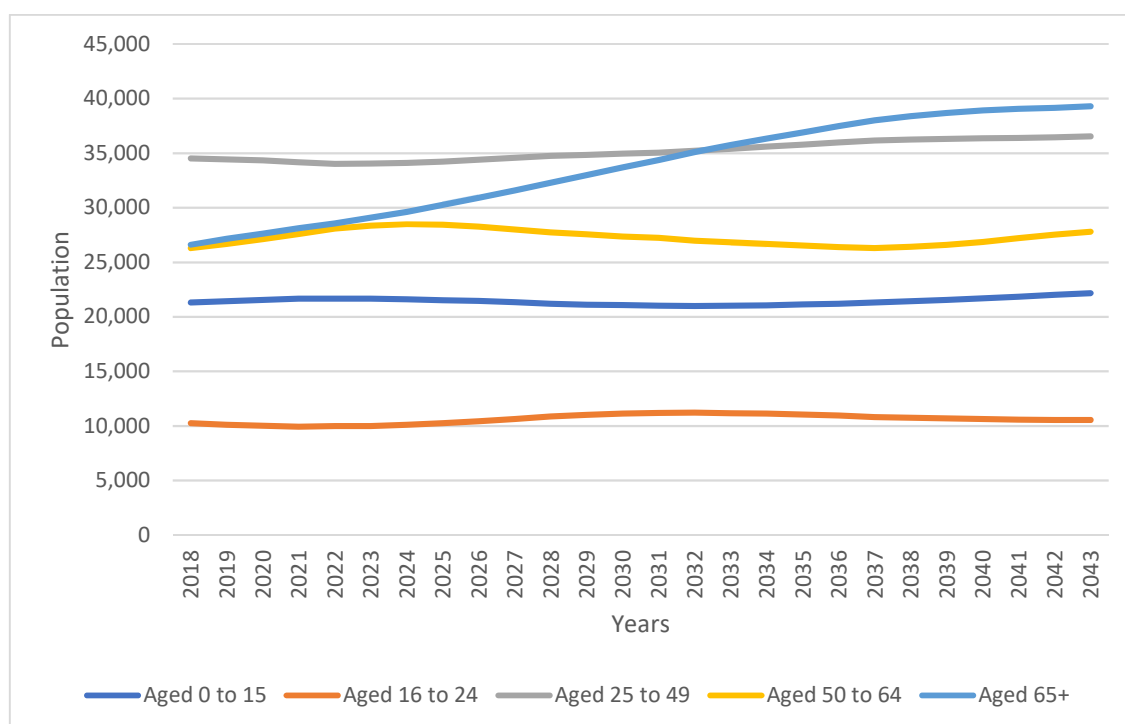
Figure 5 – Population Projections, 2018-2043



Source: *Population Estimates/ Projections, 2020*

3.6 However, while Stroud’s population is expected to grow overall, as Figure 6 shows, that growth is strongly focused in the 65 plus cohort, with this age group projected to increase by 12,677 between 2018 and 2043, nearly a 50 percent increase from the 2018 figure of 26,618. By comparison change in the working age, 16-64 groups will be far more modest, a projected increase of 3,811 or a 5 percent increase on the 2018 total of 71,075. Age groups of 0-15 are forecast to see negligible change over this period.

Figure 6 – Population Projections by Age Group, 2018-2043



Source: Population Estimates/ Projections, 2020

3.7 Available data (January 2018-December 2018) shows that 85.2 percent of the District’s present working age population are in employment (60,400 residents). This figure lies significantly higher than the South West average (78.7 percent) and the national average also (75.4 percent), indicating a strong and active local economy. During the same time period, the unemployment rate within Stroud District was 4.0 percent. Whilst this is higher than the South West average of 3.2 percent, it is in line with the national average of 4.2 percent.

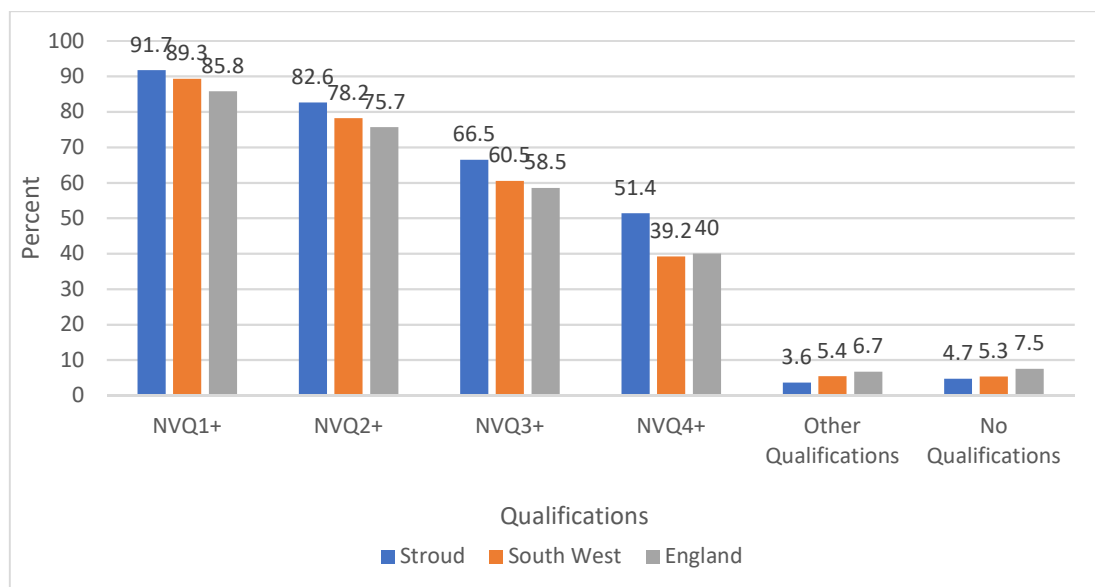
Population Profile

3.8 The national index of deprivation (IMD) 2019, ranks Stroud District the 280th (out of 317 Local Authorities) most deprived local authority in England. This indicates a low

level of deprivation within the District, which falls within the top 20 percent least deprived local authorities in England. 69 Lower Super Output Areas (LSOAs) can be found within Stroud District. 14 of these LSOAs (20 percent) were amongst the 10 percent least deprived in England. No LSOA in Stroud fell into the top 20 percent most deprived in England.

- 3.9 Figure 7 below shows the National Vocational Qualifications (NVQ) level attained by the working age population of Stroud District in 2019. It can be seen that the levels of people with NVQ1-4 qualifications in Stroud District are all higher than regional and national averages. This shows a well-educated workforce within the District.

Figure 7 – Qualifications



Source: ONS Annual Population Survey, 2020

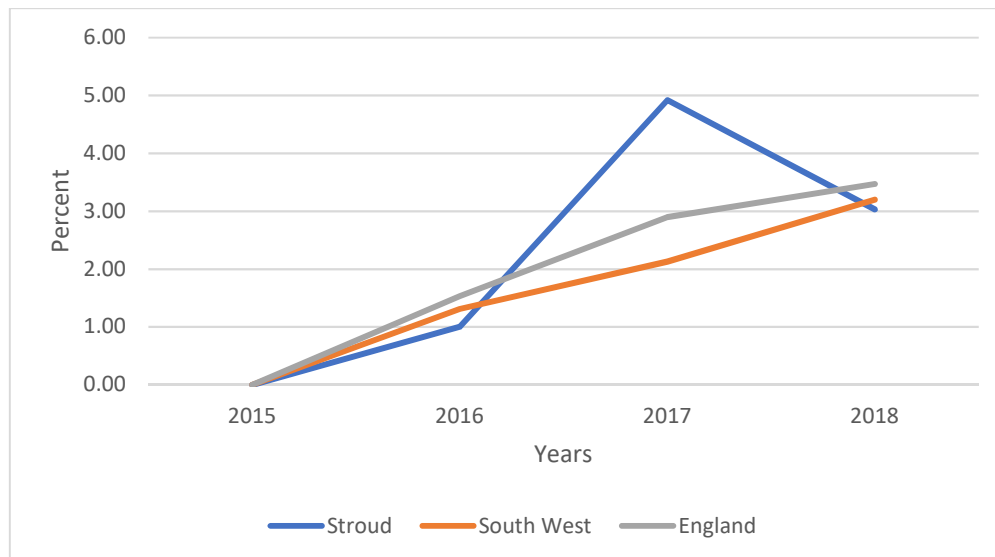
- 3.10 The proportion of the working age population with no qualifications is 4.7 percent, a figure again better than wider averages by being 0.6 percent lower than the South West average and 2.8 percent lower than the English average. This positively shows only a small amount of the local working population with no qualifications.

Employment Growth

- 3.11 The Business Register and Employment Survey (BRES) data provides details on the number of jobs within differing industry sectors within a local authority area.
- 3.12 As of 2018, within Stroud District, there were a total of 52,000 jobs identified in BRES split between 19 different main industries. As seen in Figure 8, from 2015-2017,

employment numbers were rising in Stroud District, a total growth of 4.92 percent. However, a decline occurred in 2017-2018 of 1.89 percent. Overall during the time frame employment figures increased from 50,000 to 52,000. During the same time frame, employment levels in the South East and England only increased by 3.20 percent and 3.47 percent respectively.

Figure 8 – Employment Growth, 2015-2018



Source: BRES, 2020

- 3.13 This growth in Stroud District has mainly been driven by growth in the Accommodation and Food services sector of 1,250 jobs, with growth focused in the Beverage Serving activities sector. This will have been in the form of pubs/ bars.
- 3.14 Sectors requiring at least some E/B-Class premises, which also grew over 2015-2018 included Manufacturing and Health, both of which gained around 500 jobs. Some sectors which experienced decline during the time frame included Professional, scientific and technical (of 750 jobs) and Water supply (425 jobs). Employment reductions in the former are concentrated in scientific research and advertising/market research activities. It is not clear if the reductions are linked to the loss, or decline, of any specific local employer(s).
- 3.15 Table 14 measures local economic activity by sector within Stroud District as of 2018.

Table 14 – Economic Activity, Employees, 2018

| | Employment Structure | | | |
|--|----------------------|--------------|--------------|--------------|
| | Stroud District | | South West | England |
| | No. | Percent | Percent | Percent |
| 1: Agriculture, forestry and fishing* | 1,625 | 3.1 | 2.7 | 1.3 |
| 2: Mining, quarrying and utilities | 35 | 0.1 | 0.1 | 0.1 |
| 3: Manufacturing | 9,500 | 18.3 | 8.3 | 7.9 |
| 4: Electricity, gas, steam and air conditioning | 900 | 1.7 | 0.5 | 0.4 |
| 5: Water supply, sewerage and waste management | 425 | 0.8 | 0.8 | 0.7 |
| 6: Construction | 3,750 | 7.2 | 5.5 | 4.8 |
| 7: Wholesale and retail trade | 7,500 | 14.4 | 15.7 | 15.3 |
| 8: Transportation and storage | 1,625 | 3.1 | 3.9 | 4.8 |
| 9: Accommodation and food services | 4,750 | 9.1 | 9.5 | 7.5 |
| 10: Information and communication | 1,875 | 3.6 | 3.3 | 4.3 |
| 11: Financial and insurance | 275 | 0.5 | 2.7 | 3.4 |
| 12: Property | 700 | 1.3 | 1.9 | 1.9 |
| 13: Professional, scientific and technical | 3,000 | 5.8 | 7.2 | 9.0 |
| 14: Business administration and support services | 2,375 | 4.6 | 6.4 | 9.0 |
| 15: Public administration and defence | 950 | 1.8 | 4.2 | 3.8 |
| 16: Education | 4,250 | 8.2 | 8.3 | 8.6 |
| 17: Health | 6,000 | 11.5 | 14.3 | 12.5 |
| 18: Arts, entertainment and recreation | 1,625 | 3.1 | 2.7 | 2.5 |
| 19: Other Services | 800 | 1.5 | 2.0 | 2.1 |
| Total | 52,000 | 100.0 | 100.0 | 100.0 |

Source: BRES, 2020

- 3.16 The figures in Table 14 show that Manufacturing accounts for the largest number of employees within Stroud District, 9,500 or 18.3 percent of the total number of jobs within the District (52,000). This figure is significantly higher than wider averages, by at least 10.0 percent. This illustrates the ongoing strength of manufacturing in Stroud District, which, as noted above has gained jobs over 2015-2018. This contradicts past and current economic forecasts, discussed in relation to the ENA Study in Section 2.0, which suggest that manufacturing should have declined in recent years, and will

continue to decline in the future. It also supports the conclusions of the ENA that the preferred forecast methods are growth models which, amongst other changes, adjust out the forecast declines in manufacturing and allow for some growth in key manufacturing sectors.

3.17 Dominant manufacturing sub-sectors in Stroud District include:

- Manufacture of computer, electronic and optical products – 3,000 employed as of 2018 and a focus for recent growth.
- Manufacture of machinery and equipment n.e.c. – 1,500 employed as of 2018.
- Manufacture of fabricated metal products, except machinery and equipment – 1,250 employed as of 2018.
- Manufacture of food products – 1,000 employed as of 2018.

3.18 Wholesale and Retail trade employs the second highest number of people, 7,500. This equates to 14.4 percent of the total, and lies just below both regional and national averages. The Health sector is the only other sector within Stroud District employing more than 10.0 percent of those in employment, 11.5 percent (6,000 employees). This will include employment at Stroud General Hospital.

3.19 Transportation and storage has a fairly modest role in the local economy, employing 1,625 in 2018, or 3.1 percent of employment, which is below wider averages.

3.20 Private sectors that are typically found within offices comprise: Financial and insurance; Professional scientific and technical; and Business administration and support services. These sectors account for 0.5 percent, 5.8 percent and 4.6 percent of local employees respectively, all lower than wider averages. Stroud District has a combined total of 10.9 percent of employees in primarily office-based sectors, compared with 16.3 percent and 21.4 percent for the South West and England respectively.

3.21 In particular, financial and insurance only accounts for 0.5 percent of employment. This figure is 2.2 percent behind South West average and 2.9 percent behind the English average. Financial services thus only have a very modest role in the economy of the District. At 1.8 percent of employment, compared to an average of 2.4 percent for the South West, Public administration also has only a modest role in the local economy.

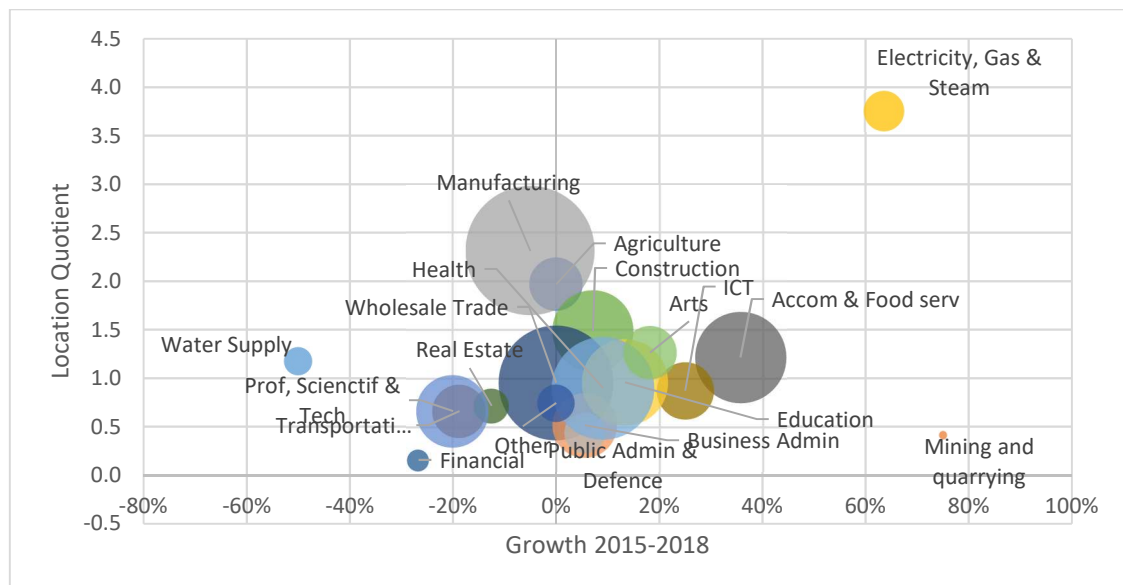
The Health sector apart, Stroud District is not particularly dependent on public sector employment.

- 3.22 Several sectors have a comparatively weak role within the District: including Mining and quarrying; Water supply; and, as stated, Financial and insurance, which all account for less than 1 percent of local employment.

Location Quotients

- 3.23 Location Quotients (LQ) are a measure of an areas specialisms within the local economy. Figure 9 displays these along with both the size of a sector in 2018 and its growth through employment numbers over 2015-2018. Location Quotients were calculated for Stroud District in the ENA, and whilst numbers may be slightly different, the same pattern still follows for each of the sectors. LQ Figures are given in tabular form in Figure 21 of the ENA report, whilst those for this Study presented in a graph in Figure 9 below.

Figure 9 – Location Quotients vs Employment vs Growth, 2015-2018



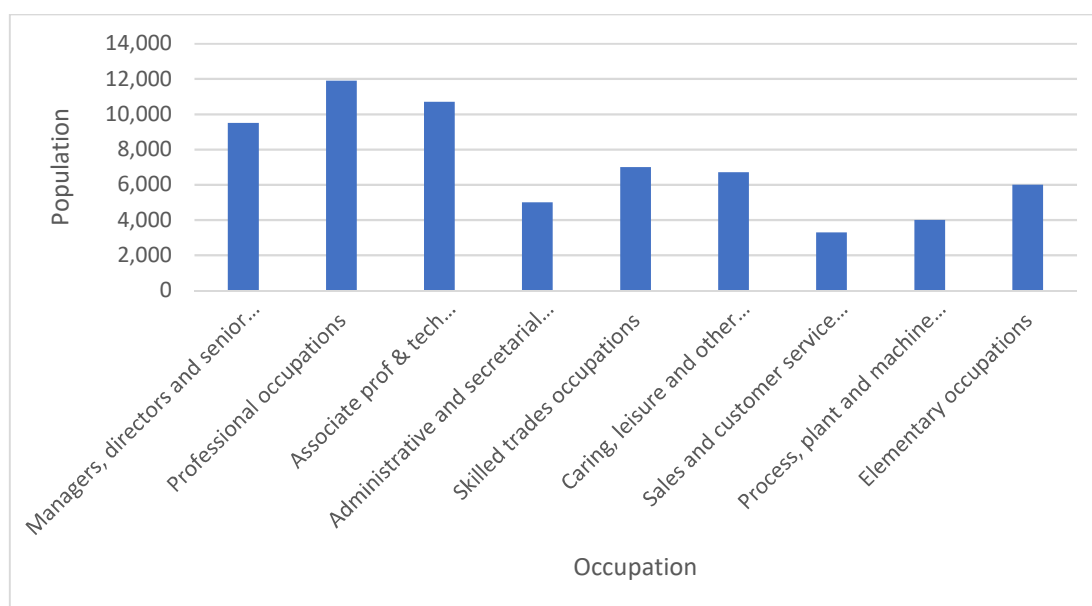
Source: BE Group analysis of BRES, 2020

- 3.24 Employment growth is shown on the horizontal (x) axis. Mining and quarrying has experienced 75.0 percent growth since 2015, although this only represents a boost of 15 jobs, from 20 to 35. The sector still has a negligible role within Stroud District. The only other sector to experience a growth of over 40 percent was Electricity gas and steam, which grew by 63.64 percent.

The largest decline in employment numbers occurred in the Water supply sector which, as previously mentioned, experienced a reduction of 425 jobs, 50.0 percent of the 2015 figure. It is not clear if this reduction relates to the closure of any specific facility or office in the District.

- 3.25 Location Quotients are displayed on the vertical axis (y axis), describing the proportion of employment within a sector in Stroud District relative to Great Britain (GB) in 2018. It is a measure of an area's specialisms i.e. if a certain sector is more prevalent in the area than in the country as a whole. A score of 1.00 shows a sector performing at the same level as seen in Great Britain. The closest sector to this, as seen in Figure 9 above, is Education with an LQ of 0.959. Each sector is also represented by different sized bubbles, which indicates the size of the sector's employment in 2018.
- 3.26 The sectors situated at the top of the diagrams (i.e. at the top of the vertical axis) show the sectors which have a high degree of localised specialisation, compared to GB. Electricity, gas and steam displays the highest degree of specialisation, being 3.76 times the average size of the sector in GB. As previously stated this sector has experienced the second highest percentage of growth since 2015 and employs 900 people. Manufacturing, with an LQ of 2.31, has the second highest degree of specialisation in Stroud District (over twice the size of the sector within GB). This sector employs the largest number of people, 9,500. Again, this shows Manufacturing as a very important sector for Stroud District.
- 3.27 Financial services are displayed as the lowest on the y axis, with an LQ of 0.16. This means the local sector is less than a fifth the average size of the sector in GB. It has also experienced a 26.7 percent decrease in employment numbers since 2015.
- 3.28 Figure 10 below shows the split of employment by occupation of residents in Stroud District, as opposed to those travelling in to work in the District from elsewhere, from January – December 2019. Residents in Professional occupations account for 18.5 percent of the workforce, the highest amount within Stroud District. Collectively, along with occupations of managers and associate professionals, exactly half of residents within Stroud District are employed within the top three occupations, in terms of skilled work and pay.

Figure 10 – Employment by Occupation, January-December 2019



Source: Annual Population Survey, 2020

Number and Sizes of Businesses

3.29 ONS data identifies that there were 5,969 VAT and PAYE registered businesses operating in Stroud District as of the latest 2019 data. This is the same number that were registered within 2018. A breakdown of these businesses by size is shown in Table 15, and compared with wider averages.

3.30 Micro businesses (0-9 employees) are dominant within Stroud District, representing 89.4 percent of businesses. This is in line with wider averages. On a national scale, 97.9 percent of local businesses employ up to 49 people, again close to wider averages.

3.31 In Stroud District, 15 businesses were identified as having more than 250 people, a total of 0.3 percent of businesses. This is in line with percentages of the South West and England.

Table 15 – Business Sizes

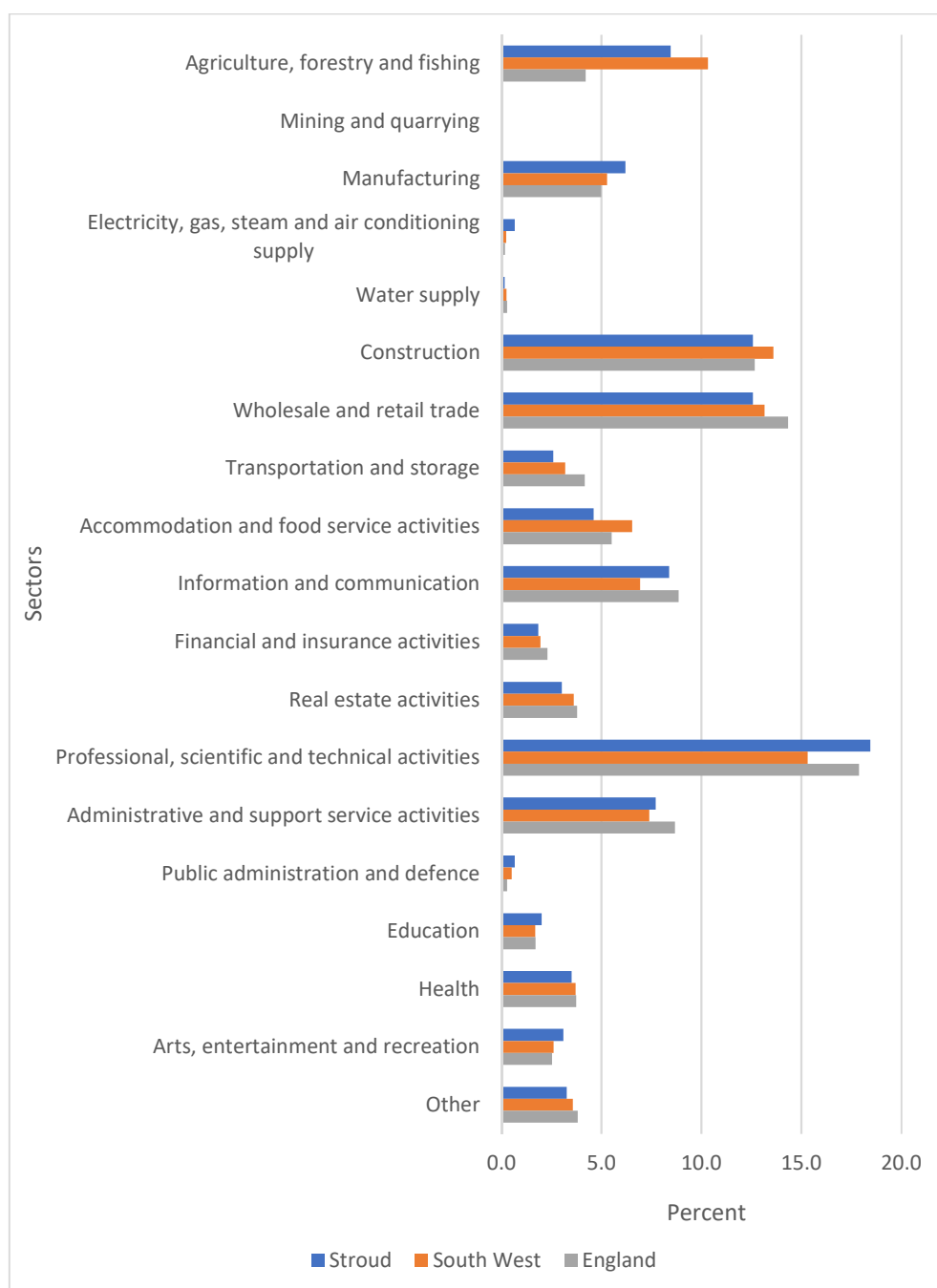
| Area | Number/ Percentage | Employees | | | | | | |
|-----------------|-----------------------|-----------|--------|--------|-------|--------|---------|-------|
| | | Micro | | Small | | Medium | | Large |
| | | 0-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250+ |
| Stroud District | Number | 4,675 | 655 | 345 | 190 | 60 | 30 | 15 |
| | Percentage | 78.4 | 11.0 | 5.8 | 3.2 | 1.0 | 0.5 | 0.3 |
| South West | Number | 181,075 | 27,790 | 13,875 | 7,365 | 2,335 | 1,190 | 790 |
| | Percentage | 77.2 | 11.9 | 5.9 | 3.1 | 1.0 | 0.5 | 0.3 |

| | | | | | | | | |
|----------------|-------------------|-----------|---------|---------|--------|--------|--------|-------|
| England | Number | 1,854,115 | 260,850 | 130,720 | 69,345 | 23,350 | 13,150 | 9,250 |
| | Percentage | 78.5 | 11.0 | 5.5 | 2.9 | 1.0 | 0.6 | 0.4 |

Source: ONS UK Business Counts, 2020

- 3.32 The total number of businesses can also be broken down by industry sector, as seen in Figure 11. The highest proportion of businesses within the District can be found within the Professional, scientific and technical sector (18.4 percent or 1,100 businesses), higher than wider averages. This sector, which is an office based sector, is noted above as comprising 3,000 employees (5.8 percent of those in employment). This equates to an average business size of three employees, i.e. a micro business.
- 3.33 Construction and Wholesale and retail trade are the joint second most populous sectors in terms of number of businesses, with a 12.6 percent share of businesses within the District, each. This equates to 750 businesses within each sector. The number of employees within Construction is 3,750 or 7.2 percent, meaning construction businesses are mostly micro business with an average of five employees. An average of 10 employees are found within each Wholesale and retail trade business. Businesses within this sector are thus mostly micro-small in size.
- 3.34 155 businesses or 2.6 percent of local firms are within the transportation and storage sector, well below wider averages.
- 3.35 Manufacturing businesses account for the highest number of employees, 9,500, as previously stated, whilst the sector contains the seventh highest number of businesses with 370. This equates to 6.2 percent of businesses belonging to the Manufacturing sector, and an average of 26 employees per business, equating to a 'small' firm.

Figure 11 – Business Count by Sector, Percent



Source: ONS UK Business Counts, 2020

The Strength of the Green Economy

3.36 The GFirst Draft Local Industrial Strategy, summarised in Section 2.0, put ‘Green Growth’ at the heart of its strategy for economic change in Gloucestershire. Policy “*will capitalise on Gloucestershire’s natural assets and rural environment to make the county the greenest place to live and work in England...*” with activities including:

- *“Putting clean growth at the heart of our strategies for business growth and our approach to infrastructure investment*
- *Building on the capabilities of local green companies and attracting more.”*

3.37 ‘Green’ companies can be defined as those which manufacture products or provide services aimed at reducing the UK’s carbon footprint or otherwise enhancing the local environment. As one measure of possible demand for accommodation locally from such green companies, this section considers the level of employment already present in Stroud District, and adjoining areas, which may be considered ‘Green’.

3.38 Primary Green Jobs sectors are those in which company activities wholly or mainly are aimed at the low carbon and environmental markets. Secondary Green Jobs are those in which company activities are partially involved in the low carbon and environmental markets but may have other aspects to their business which are not ‘Green’ in nature. These have been classified into the following sectors listed in Table 16 below from the latest BRES data from 2018. A breakdown of the SIC codes used to classify these sectors can be found in Appendix 2.

3.39 Additionally, business counts data captures the number of companies who fall within these primary and secondary sectors and have also been identified in Table 16. This data has been gained from UK Business Counts in 2019.

Table 16 – Primary and Secondary Green Jobs and Businesses

| Sub-Sector | Stroud | |
|---|--------|------------|
| | Jobs | Businesses |
| Primary | | |
| Energy Management | 50 | 5 |
| Environmental Consultancy | 280 | 100 |
| Renewable Energy | 345 | 60 |
| Green Infrastructure | 510 | 100 |
| Waste and Recycling | 530 | 20 |
| Water Supply and Treatment | 5 | 0 |
| Secondary (where not fitted into a primary category) | | |
| Agriculture, Forestry and Fishing | 1,625 | 505 |
| Electricity | 130 | 40 |
| Architects and Technical Services | 830 | 245 |

| | | |
|-------------------------------------|--------------|--------------|
| Construction | 1,220 | 225 |
| Electrical and Heating Installation | 855 | 190 |
| Sustainable Transport | 255 | 10 |
| Total | 6,780 | 1,500 |

Source: BRES, 2020

- 3.40 A total of 6,780 jobs within Stroud, in 2018, can be calculated as having all or some focus upon being 'green'. From earlier analysis there was found to be 52,000 people in total employment during the same year. This equates to 13.0 percent of jobs in Stroud being counted as 'green'. Within the primary sectors, the majority of green jobs are found within Waste and recycling. Within this category, 43.4 percent are found within 'Collection of non-hazardous waste'.
- 3.41 Overall, the highest proportion of 'green' jobs are found within the Agriculture, Forestry and Fishing sector. This is a secondary green industry - not all roles will contribute to the low carbon and environmental markets. It accounts for nearly a quarter of employment in Stroud District. Within this sector, 1,500 are in employment (92.3 percent) within DEFRA recognised agricultural jobs. Whilst these are 'green' roles, they are not the type which could be situated within commercial property i.e. business parks and therefore are not directly relevant to this study.
- 3.42 The second strongest category is Construction, and in particular the 'Construction of domestic buildings', where increasingly strong environmental construction codes are applied. Whilst a total of 650 are in employment within this sub-sector, it is recognised that only a small number of these will be counted as 'green', most of which comprise manual labour. However, the administration side of a company within this sector could be situated within a business park.
- 3.43 Of a total of 5,969 business found within Stroud District in 2019, around a quarter, 1,500, can be seen as being 'green'. This is a sizable number of local firms which could potentially occupy green business space although, in practice, around a third of these firms are in agriculture, forestry and fishing, and will be mostly farm or land based and will not require specific E/B-Class accommodation.
- 3.44 Within the primary sectors, the highest number of green businesses currently are found within the Environmental Consultancy and Green Infrastructure sectors, with 100 businesses each in 2019. 70 percent of businesses within Environmental Consultancy

were found within 'Other Professional, scientific and technical activities', whilst 75 percent of business within Green Infrastructure were within 'Landscape service activities'.

- 3.45 A strong secondary category is Architects and technical services, which contains 245 business, with 85.7 percent within 'Engineering activities and related technical consultancy'. Similar to the construction category discussed above, whilst some roles within this sector may comprise manual labour, any administration of companies which are 'green' could be located within a business park.

Table 17 – Green Jobs in Comparative Areas

| Location | Total No. of Green Jobs | Total No. of Green Businesses |
|------------------------------|-------------------------|-------------------------------|
| Cheltenham | 4,940 | 810 |
| Cotswold | 7,330 | 1,725 |
| Forest of Dean | 4,540 | 1,225 |
| Gloucester | 5,430 | 575 |
| Stroud | 6,780 | 1,500 |
| Tewkesbury | 6,150 | 1,075 |
| Gloucestershire | 35,170 | 6,910 |
| <i>South Gloucestershire</i> | <i>18,560</i> | <i>2,360</i> |
| South West | 302,540 | 60,450 |
| England | 2,445,400 | 441,480 |

Source: BRES, 2020

- 3.46 As Table 17 shows, a total of 35,170 green jobs were identified in Gloucestershire in 2018. Another 18,560 can be found in nearby South Gloucestershire. Stroud District ranks as the second highest in the county in terms of number of those in employment in green jobs, 19.3 percent of the county total. Gloucestershire accounts for 11.6 percent of the total number of green jobs in the South West.
- 3.47 A total of 6,910 green businesses were identified in Gloucestershire in 2019, with Stroud District accounting for 21.7 percent of this total and again ranking second highest in the County. By both measures, Cotswold has the county's largest green economy overall in Gloucestershire, although it is only 8-13 percent larger than Stroud District's. All the Gloucestershire Local Authority Areas have smaller green economies than South Gloucestershire, however. Positively, South Gloucestershire borders Stroud District and could allow businesses easy movement to a specially designed green business park.

Potential Economic Implications of Covid-19 Pandemic

- 3.48 Covid-19 is still an ongoing situation and therefore much of the actual, near-term impacts have yet to be fully realised and the economic data (which has a lag time) has yet to fully emerge. The impacts over the longer term are still less certain, most pertinently in relation to the upward curve of the economic recovery in the medium term following the pandemic; however, some evidence has been gathered to show potential impacts upon Stroud District and wider areas.
- 3.49 Figures show that the number of people claiming out of works benefits almost trebled from March to July 2020, from 1055 to 2,885 in Stroud District, rising from 1.5 percent to 4.1 percent of the 16-64 year old population. However, the proportion of claimants in Stroud District remains below county (2.0 percent rising to 4.9 percent), regional (2.2 percent rising to 5.3 percent) and national levels (3.1 percent rising to 6.5 percent). The proportion of claimants in Stroud District was lower than, or equal to, all other local authority areas in Gloucestershire in July 2020.
- 3.50 The Coronavirus Job Retention Scheme (furlough scheme) has protected some jobs during the lockdown, including in Stroud District. Unemployment would be higher if not for the scheme, therefore the number and proportion of claimants would be higher. Her Majesty's Revenue and Customs (HMRC) data on the furlough scheme shows that for July 2020 some 16,000 jobs were furloughed in Stroud District, approximately 29 percent of eligible jobs. This was slightly lower than the Gloucestershire/South West average of 30-31 percent.
- 3.51 In May 2020, McKinsey & Company produced the report '*COVID-19 in the United Kingdom: Assessing jobs at risk and the impact on people and places*' which reviewed sectors which could be impacted and identified that "7.6 million jobs or 24 percent of the UK workforce, are at risk because of Covid-19 related lockdowns".
- 3.52 By sector, the impacts are predicted to fall most heavily on leisure and retail services with many businesses forced to close over March-July 2020, and still facing restrictions on operations. McKinsey & Company estimate that 41 percent to two thirds of jobs are at risk in these sectors. Certainly, three quarters of eligible jobs in accommodation and food serves were furloughed across the South West in July 2020, and 40 percent of retail and wholesale jobs. For the most part these sectors do not require E/B-Class accommodation, but it is still worth noting that they accounted for 28.1 percent of

employment in Stroud District or 14,675 jobs in 2018, and nearly a quarter of businesses, 1,405 in 2019 (see Table 18).

Table 18 – Sectors Most at Risk from the Economic Impact of the Covid-19 Pandemic

| Sector | Percentage in Employment | Business Counts |
|------------------------------------|--------------------------|-----------------|
| Accommodation and food services | 9.1 | 4.6 |
| Arts, entertainment and recreation | 3.1 | 2.6 |
| Other service activities | 1.5 | 3.3 |
| Wholesale and retail trade | 14.4 | 12.6 |
| Construction | 7.2 | 12.6 |

Source: McKinsey & Company, 2020 and BRES, 2018

- 3.53 In the Construction sector, which does require E/B-Class accommodation, McKinsey & Company estimate that 39 percent of jobs are at risk from a slowdown in development activity. 62 percent of eligible Construction jobs were furloughed in July 2020. Construction accounted for 7.2 percent of employment, in Stroud District, in 2018, as noted above and 12.6 percent of local businesses, 750, in 2019.
- 3.54 In sectors likely to be accommodated in E(g) (i) offices – Business administration and support services, Financial and insurance, Professional, technical and scientific – 8-21 percent of jobs were judged to be at risk and around a quarter of eligible jobs in each sector were furloughed in July 2020. Collectively these accounted for 10.9 percent of local employment, 5,150 jobs and 28.0 percent of total businesses, 2,210.
- 3.55 As noted above, this is the strongest sector in terms of job contribution to the local economy; Manufacturing, accounted for 18.3 percent of those in employment and 5.3 percent of businesses. 17 percent of employment in this sector was judged to be at risk in May 2020 and 37 percent of eligible jobs were furloughed in July 2020. Transportation and storage has a fairly modest role in the Stroud economy at present, employing 1,625 in 2018. McKinsey & Company felt that 18 percent of jobs in this sector are at risk, notwithstanding the growth in e-commerce which has also resulted from the lockdown. 29 percent of eligible jobs were furloughed regionally in July 2020.

Homeworking

- 3.56 In Stroud District, as of the 2011 Census, 4,908 people were counted as working mainly at or from home. The last Census remains the key data source for assessing homeworking. This figure comprised 8.18 percent of the working age population in active employment during 2011. This proportion was higher than levels seen in the South West (6.57 percent) and England (4.96 percent) over the same time frame. This

indicates homeworking having a reasonable role in the local economy, more so than wider averages.

- 3.57 At time of writing, the Covid-19 pandemic was taking place, forcing many employees to work from home. These unprecedented times have forced a high proportion of businesses to operate and manage their staff remotely,. Many businesses may choose to operate, in some capacity, from home moving forward and therefore it is likely a trend will be seen in the next Census of an increased number of home workers.

Earnings

- 3.58 Understanding the difference in pay between residents and by workplace can be an indication of the strength of the economy of Stroud District. Table 19 shows the difference in pay between residents and by place of work in Stroud District compared to wider averages.

Table 19 – Average Weekly Earnings

| Area | Gross Median Weekly Pay, £ (Analysis by place of work) | Gross Median Weekly Pay, £ (Analysis by place of residence) |
|-----------------|--|---|
| Stroud District | 574.90 | 546.90 |
| South West | 551.40 | 560.60 |
| England | 591.40 | 591.30 |

Source: Annual Survey of Hours and Earnings, 2020

- 3.59 The average weekly pay for a resident of Stroud District was £546.90/ week and when measured by place of work was £574.90/ week. This is a difference of £28.00. This difference indicates Stroud District residents are out-commuting for work and therefore not taking full advantage of the higher paid employment opportunities that can already be found within the District.
- 3.60 Compared to the wider averages, by place of work, Stroud District ranks higher than South West yet lower than the national average. However the national average must be taken with caution as will include major cities such as London where pay is higher. By place of residence, pay in Stroud District is, perhaps surprisingly, well below average.

Summary

- 3.61 As of 2018, the population of the District was 119,019, a figure which has been steadily growing since 2014. Looking forward, the population is forecast to steadily increase by

14.6 percent up to 2043. This growing population is increasing at a rate in line with the South West, whose population is set to increase by 14.1 percent during the same period.

- 3.62 However, the vast majority of that growth is projected to be in the 65 plus cohort, which could see an increase of nearly 50 percent over 2018-43. By comparison, the working age population of 16-64 year olds is only projected to see 5 percent growth. This means working age people, as a proportion of the local population, are forecast to reduce from 60 percent today to 55 percent in 2043.
- 3.63 From January 2018-December 2018 the proportion of the District's working age population that was in employment, was 85.2 percent, well above wider averages. The unemployment rate of 4.0 percent was higher than the South West average but in line with the national average of 4.2 percent. Thus, Stroud District does not seem to have a significant problem with joblessness.
- 3.64 Deprivation is not an issue in Stroud District. Stroud District is the 280th most deprived local authority in England, out of 317. No LSOA in Stroud fell into the top 20 percent most deprived in England. The District population is also well educated with the number of residents with all levels of NVQ attainment being above wider averages.
- 3.65 Stroud District had some 52,000 jobs in 2018 and local employment has seen around a five percent increase in local employment since 2017. This growth has mainly been driven by growth in the Accommodation and Food services, which gained 1,250 jobs. There were 5,969 VAT and PAYE registered businesses operating in Stroud District as of the latest 2019 data. These were mostly micro in size.
- 3.66 Manufacturing continues to dominate the local economy, employing 9,500 in Stroud District in 2018, 18.3 percent of total employment and seeing an increase of 500 jobs since 2017. This is stronger than wider averages by at least 10.0 percent and with an LQ of 2.31, has the second highest degree of specialisation within Stroud District. While most local industrial businesses are likely to be small in size, Stroud District is home to some major employers which give the District strong specialisms in the manufacture of computer, electronic and optical products; machinery and equipment; fabricated metal products and food production.

- 3.67 Transportation and storage has a fairly modest role in the local economy at present, employing 1,625 in 2018, or 3.1 percent of employment, which is below wider averages. 155 businesses or 2.6 percent of local firms are within the transportation and storage sector, again well below wider averages.
- 3.68 Sectors typically found in private offices, Professional, scientific and technical, ICT and Business administration, account for 10.9 percent of employees. This is lower than wider averages although still accounting for a not irrelevant 6,075 jobs locally. Financial services have a negligible role in Stroud District's economy, accounting for only 0.5 percent of local employment. Although employment in office-based businesses is below wider averages, the highest proportion of local businesses are in the Professional, scientific and technical sector, 18.4 percent or 1,100 businesses. A high number of businesses and a modest number of employees suggests most businesses in this sector are small, employing an average of three people.
- 3.69 The public sector has a modest role in the local economy, public administration and defence, health and education together account for 21.5 percent of local employment, compared to regional and national averages of 26.8-24.9 percent.
- 3.70 1,500 businesses, accommodating 6,780 jobs within Stroud District, at 2018/19, can be calculated as having all or some focus upon being green, i.e. helping to support a low carbon future or deliver other environmental benefits. This accounts for 13.0 percent of local employment and around a quarter of businesses, at least in 2018/19, a sizable proportion, indeed larger than employment in sectors mostly in private offices.
- 3.71 While Stroud District has been impacted by the Covid-19 lockdown, the initial effects, in terms of the furloughing of workers have been milder in Stroud District than elsewhere in Gloucestershire. Of the sectors which require E/B-Class accommodation, the Construction sector is felt to be most at risk from the economic impacts of the Covid-19 lockdown. Construction accounted for 7.2 percent of employment, in Stroud District, in 2018, and 12.6 percent of local businesses, 750, in 2019.
- 3.72 According to the 2011 Census, 4,908 people were counted as working from home, 8.18 percent of the working age population in active employment at that time. This proportion is higher than levels seen in the South West (6.57 percent) and England (4.96 percent) over the same time frame.

- 3.73 With a difference of £28.00 between average weekly pay for a resident of Stroud District, £546.90/ week, and for people who just work in the District, £574.90/ week, residents of Stroud District are not taking full advantage of the higher paid employment opportunities that can be found within the District.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This section considers the demand for commercial property within the District of Stroud. Commentary is given on national and regional market trends which will impact on the local demand for land and premises. It also considers some of the initial impacts of the Covid-19 Pandemic on relevant UK property markets. The local market is assessed through a quantitative review of the local supply of vacant premises, transactional data from the last decade, alongside up to date market knowledge from consultations carried on with developers, scheme managers and property agents.

National and Regional Property Markets

- 4.2 BE Group has a long experience of operating in the commercial property market across the UK, as well as in Gloucestershire, and understands market perceptions and the conditions facing the industrial, logistics and office sectors, along with the wider investment market.
- 4.3 Some brief comments on the wider market are therefore provided below. It is noted that this report has been compiled during the Covid-19 pandemic and some market reports researched pre-date this, however, comments have also been made regarding the effects this pandemic may cause on future markets and the recovery process.

| <i>Industrial Market</i> | |
|--------------------------|--|
| • | New supply and softer demand in the South West market has resulted in a prime rent of £7.25/ sqft in 2019 (Cushman & Wakefield, 2020) |
| • | Prime yield in the UK in April 2020 was 4.4 percent (Savills, 2020) |
| • | Take-up reached 6.8 million sqft (632,000 sqm) in Q4 across the UK, taking the annual total to 32.5 million sqft (3 million sqm) – a 5 percent increase on the 10-year average (Cushman & Wakefield, 2020) |
| • | A return of speculative development to the South West is helping replenish the supply of grade A space (Cushman & Wakefield, 2019) |
| • | Despite some 3 million sqft (279,000 sqm) of floorspace being available in the Greater Bristol area in mid-2019 there were still felt to be shortfalls against demand particularly for units of 3,500-7,000 sqm |
| • | Quedgeley/Junction 12, M5 remains a focus for B2 and B8 development in the Gloucester market, with only Gloucester Business Park offering significant competition. With only 350,000 sqft (33,000 sqm) of supply available as of the end of 2019 the demand for more |

| |
|--|
| <p>remains strong. Headline rents are £7/sqft (£75/sqm) with prime rents reaching £8.50/sqft (£92/sqm) (Alder King, 2020).</p> |
| <p>Warehouse/ Logistics Market</p> |
| <ul style="list-style-type: none"> • Availability has been rising during 2019 in the South West, up 6 percent since 2018, of which 20 percent (1.1 million sqft (102,000 sqm)) was deemed Grade A (Cushman & Wakefield, 2020) • However, regional supply is skewed towards smaller-sized units as 44 percent of available units are under 20,000 sqm with no units above 40,000 sqm available as of Q3 2019. With only around a years B8 supply available, demand is strongly encouraging B8 developments, especially for Grade A options (Savills, 2020) • Online retail and supermarket demand is surging during the pandemic, producing a knock on effect of new warehouse requirements. Whilst several retailers are seeking short-term space, over 5 million sqft (465,000 sqm) of requirements are expected nationwide to allow occupiers to respond to changing behaviours (Lambert Smith Hampton, 2020) • Vacancy rates have dropped from 23 to 7 percent nationwide (Savills, 2020) • Investment activity fell sharply in the UK during lockdown, but is beginning to pick up again (CBRE, June 2020) |
| <p>Office Market</p> |
| <ul style="list-style-type: none"> • A quiet market is being experienced during the pandemic, especially April and May, but a strong release of pent-up transactions are expected in later 2020 (Lambert Smith Hampton, 2020) • In the UK, transaction volumes in April were at the lowest monthly record since November 2008 (Savills, 2020) • Prime yield in April 2020 in the UK was 4.5 percent (Savills, 2020) • Across the UK in the last 12 months, the business services sector has accounted for 25 percent of take-up (CBRE, 2020) • Interest remains strong in Gloucester's out of town market, which is dominated by Gloucester Business Park, Tewkesbury. Prime rents reached £21.50/sqft (£231/sqm) in 2018/18 here against £16.00 sqft (£172/sqm) in the City Centre. Gloucester's city centre has struggled with weak demand, although prospects are looking more positive moving forward with the delivery of King's 4,000 sqm office space. • Cheltenham is similarly dominated by its out of town market, in part due to restrictions on development in the historic centre. However, in town activity is set to benefit from the recent completion of Honeybourne Place (6,300 sqm), which is expected to achieve a prime rent of £31.0/sqft (£334/sqm) by the end of 2020. Key for the wider county will be the delivery of Cheltenham Cyber Business Park next to the GCHQ facility. The 2 million sqft (220,000 sqm) Park will focus on cyber-security but is expected to draw in a lot of demand from Gloucestershire's ICT sector generally • Recent growth in Bristol City Centre has focused on the serviced office market, with demand strongest for flexible space. Bristol is a focus for technology, media and telecoms (TMT) industries in the South West. Dyson, Netflix, and Channel 4 have all established |

offices here in recent years. However, In the past five years, Bristol has lost more office space through conversion to residential than any other major UK market, with stock levels decreasing by circa 18 percent over the period. Limited new build development and a decreasing number of refurbishment opportunities are leading to significant shortages of Grade A space. Space shortages have pushed headline rents to £35.00/sqft (£377/sqm). Demand remains focused in the City Centre (LSH, 2020)

The Initial Impacts of Covid-19 on Demand for E/B-Class Employment Uses

- 4.4 The Covid-19 Pandemic, and the related lockdown and downturn in economic activity is ongoing and its likely longer-term effects are still being understood. However, it is still possible to discern some initial impacts for sectors and businesses that use E/B-Class employment land and premises – offices, industrial and warehouses.

E(g) (i) Offices

- 4.5 During the lockdown imposed on the economy, office-based firms have adjusted to being able to work remotely. As such there is a risk for the office market that there will be longer-term structural changes to demand for office spaces. Some businesses in the UK and overseas have already indicated that they will change the way their offices function, with a higher degree of homeworking, including major tech companies. However, this is not uniform, and there will still be demand for office space.
- 4.6 Furthermore, changing workplace expectations in regard to safety and social distancing will mean that businesses will be looking for larger floor plates to enable distance between workers and team bubbles. Therefore, there are differing forces impacting on the market in different directions, including demand for increased space and demand for smaller space as higher percentages of workers work remotely.
- 4.7 The implications for serviced offices or co-working spaces are also mixed. Intuitively it would appear that the near-term demand for such spaces reduces, or indeed that such operations cannot fully open, as the risk of spreading the virus within a shared environment would be too great. However, once a new equilibrium and work practices are established in regards to working with the virus, given that there would be the potential for higher numbers of workers to be working remotely, the offer of a flexible, shared work environment may appeal to some businesses and workers.
- 4.8 The need for face-to-face interactions for office-based businesses will mean that an office presence will still be the norm. The creative and innovation benefits of an active office environment are critical for most businesses, which cannot be fully replicated

through digital platforms. Furthermore, the mental health benefits of socialising with colleagues and separating home and work environments will mean that most employees would prefer to spend at least part of their work week in the office.

- 4.9 Offices with higher levels of parking (e.g. business park, rather than city centre location) may be seen as more attractive if staff are reluctant to use public transport, or are actively discouraged from using public transport, due to the risk of catching the virus. For Stroud District, this may be manifested in some businesses looking for office premises outside of Gloucester, Cheltenham or Bristol, into a business park with higher levels of car parking. In the case of Gloucester at least, this will reflect a continuation of current trends.

B2 General Industry

- 4.10 Throughout the UK some manufacturing businesses have reduced or closed their operations, though many others have remained open, deemed essential businesses. Those that have reduced operations are beginning to scale back up as restrictions ease. Manufacturers providing medical equipment and some household staples have seen substantially increased operations, driven by spikes in demand and difficulties in accessing comparable products from overseas. However, manufacturers in vulnerable sectors, such as aviation and automotive, have experienced severe negative impacts, with several major brands announcing substantial job reductions (e.g. Airbus, Rolls Royce).
- 4.11 Some businesses that have remained open during the lockdown have seen local clusters of virus outbreaks (e.g. in food manufacturing premises) that have required a local response. Most businesses have seen some adaptation of their processes, either through reduced production or reduced product lines to respond to needs for social distancing. With less ability to undertake operations remotely, reduced production has meant furloughing staff or job losses.
- 4.12 In general, the demand for industrial premises is likely to be influenced more by the health of the economy, rather than lockdown or social distancing restrictions. Therefore, the ability of the economy to bounce back from this economic shock will be critical for the demand for stock in Stroud District. Experience at schemes such as St Modwen Park and West of Stonehouse suggests that B2 and B8 demand is holding up well so far in 2020.

B8 Warehousing

- 4.13 For the logistics sector, there have been several urgent requirements throughout the UK for short term storage and warehousing needs, including from the NHS, online retailers and supermarkets. This has been in response to the substantial changes in consumer behaviour occurring leading up to and during the lockdown, including spikes in demand for certain consumer items and increasing use of online retailing. It is likely that there will be a structural change within the retailing sector, with online retailing maintaining a higher share of the overall retail market beyond the lockdown and social distancing regimes. This likely longer term boost to online retailing from changing consumer behaviour would require further logistics premises and capacity.
- 4.14 Some information emerging in this sector is that property requirements, while seeing a spike, have had a higher proportion of short term leases (12-18 months), to respond to the immediate upturn in demand. It is expected that this would be moderate and thus recent very high levels recorded in some areas should not be seen as the new normal. However, with a likely sustained increase to online retailing and a recognition that further capacity in supply chains is needed, it is expected that demand in this sector will continue to be buoyant. Employment locations including Quedgeley/Junction 12, M5 that can provide logistics premises are likely to be seen as more attractive in the current and emerging market.

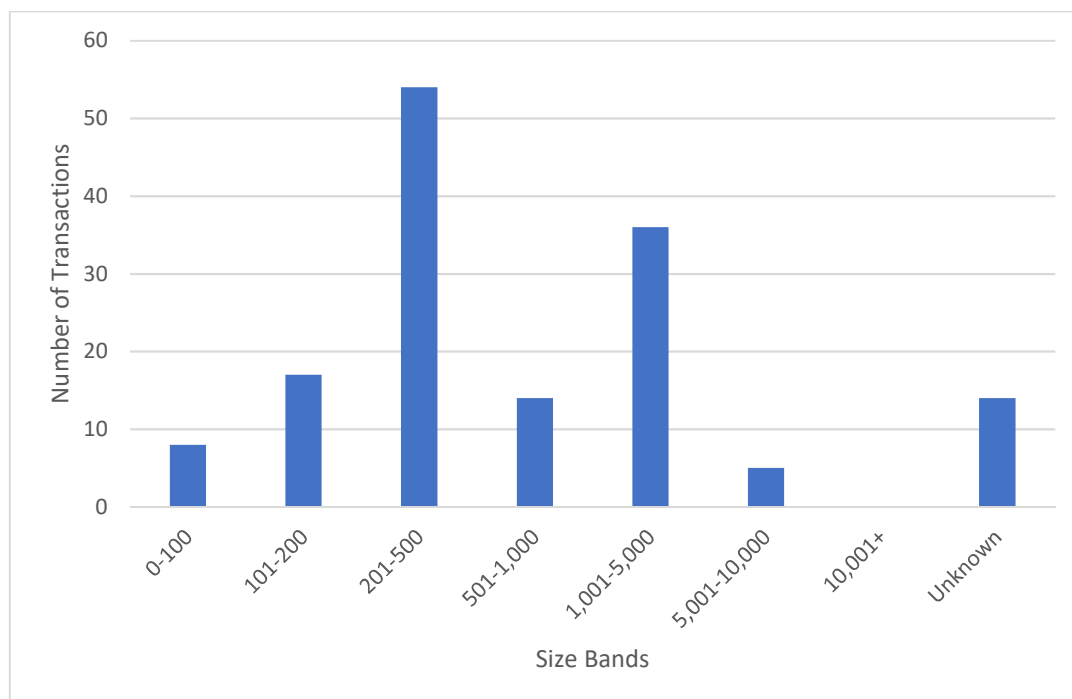
Property Transactions

- 4.15 Transactional information has been sourced from Radius Data Exchange, a property database, for industrial/ warehouse units and offices, which have been sold or let in Stroud District in the last 10 years.

Industrial/ Warehouse

- 4.16 Within the last 10 years, 148 industrial deals have completed within Stroud District, with a total of 153,558 sqm of floorspace transacted. Figure 12 shows a breakdown by size band of these deals.
- 4.17 Industrial properties of 201-500 sqm transacted most frequently and accounted for 36 percent of the decade total. 36 deals were transacted of 1,001-5,000 sqm, the second largest amount from one size band. No deals occurred in Stroud District of 10,000 sqm or larger in the last 10 years.

Figure 12 – Size Band of Industrial Deals, 2010-2020



Source: Radius Data Exchange, 2020

4.18 2016 saw the highest number of deals within one year, 22, meaning 15 percent of the deals within the decade occurred during this single year. However, it was 2014 which saw the highest total amount of floorspace transact during one year, with 38,840 sqm from 21 individual deals. 25 percent of the floorspace transacted in the decade occurred in deals in 2014. 2014-2016 was a period of strong market growth and recovery from the preceding national recession.

4.19 The largest single amount of floorspace transacted in one deal occurred in August 2014 at Quedgeley Trading Estate West. Unit A of 8,983 sqm. The unit was let for an undisclosed rent to Schlumberger Oilfield UK and Portsmouth City Council.

Rents and Quality

4.20 73 percent of the deals were completed as leasehold transactions, whilst the remaining 27 percent were freehold sales. The prime rent for the decade was achieved at Unit 11, Quadrant Centre, Quadrant Way for £9.24/ sqft (£99.45/ sqm). FSW Limited let the 251 sqm unit in 2017. Lease lengths ranged from 1-15 years, with Just Car Clinic letting Unit B of Quedgeley Trading Estate West on the longest lease length of the decade, 15 years, in 2012.

4.21 Of the 108 industrial deals which were let in the last decade, 48 (44.4 percent) stated an achieved rent. These achieved rents give a guide to the quality of the premises let, based on the following assumptions:

- <£2.50/ sqft (£27.00/ sqm) – Poor Quality
- £2.50-5.00/ sqft (£27.00-54.00/ sqm) – Average Quality
- £5.00/sqft (£54.00/ sqm) – Good Quality.

4.22 The majority of these deals were of good quality, a total of 27. Combined with units let of moderate quality, 18, these two categories account for 93.8 percent of the total lettings. Units of a poor quality only accounted for 6.2 percent of transactions. This suggests market activity has been focused on premises of good and average quality and that businesses would rather pay higher in order to occupy better quality space. There has been limited take up of budget quality space.

Sales

4.23 Unit J at Quedgeley Trading Estate sold in 2015 for £2.5 million, the largest sale price of the decade. The 2,740 sqm unit was sold to Travis Perkins. Additionally, 31 investment sales occurred during the decade, the largest amount of floorspace saw 8,905 sqm at Unit 1, Quedgeley Trading Estate West sold in 2015 for £8.02 million. Portsmouth City Council purchased the space with a net initial of 5.92 percent. This was one of only three deals to provide a net initial yield percent, the others higher at 6.10 percent and 6.78 percent.

Transactions by Area

4.24 Table 20 shows the 148 industrial transactions from the last 10 years, split by area within Stroud District. The largest proportion of transactions, 32 percent, were within Stonehouse. The most popular locations within Stonehouse were Oldends Industrial Estate, Stonehouse Park and Upper Mills Trading Estate. Hardwicke and Stroud also saw a high proportion of transactions, 20 and 21 percent respectively.

Table 20 – Transactions split by Area

| Area | No. of Marketed Properties | Comments |
|--------------------|----------------------------|---|
| Berkeley/Sharpness | 8 | Activity almost exclusively at Severn Distribution Park, for B2/B8 units of 3,000-5,000 sqm on leases of 2-10 years. Rents not disclosed. |
| Cam/Dursley | 8 | All but one deal freehold, for the purchase of smaller units of 93-230 sqm at Littlecombe |

| | | |
|---------------------|------------|---|
| | | Business Park (new build) and Draycott Business Park. Sale values of £87-92/sqft (£940-990/sqm) were achieved. |
| Frampton on Severn | 1 | Single letting of 88 sqm at Frampton Industrial Estate. Clearly a small-scale market. |
| Hardwicke/Quedgeley | 42 | Mixed freehold and leasehold activity focused at Quedgeley West Industrial Estate and Quadrant Distribution Centre. Units of 1,000-4,000 sqm taken up. Achieved rents at £5.50-6.50/sqft (£59-70/sqm). Freehold sale values at £100-150/sqft (£1,076-1,614/sqm) for new build units at Quadrant. |
| Stonehouse | 48 | Relatively even mix of sales and lettings, spread across the different Stonehouse Employment Areas, with some emphasis on Oldends Industrial Estate. Deals are in a broad range of sizes from 100-4,000 sqm, with an average of 1,000 sqm. Second hand rents are around £6/sqft (£65/sqm) freehold values are around £83-93/sqft (£900-1,000/sqm). |
| Stroud | 32 | Deals are spread across a diverse range of industrial estate, extending down to Inchbrook and Brimscombe Port in the Stroud Valleys. Deals are predominantly lettings of units of less than 500 sqm. Rents are modest at £2.50-4.50/sqft (£27-48/sqm) reflecting the fact that most stock changing hands comprises older budget/moderate quality units. There is limited evidence on freehold values. |
| Wotton-Under-Edge | 9 | Activity focused at Charfield Barns, Wotton Road and Charfield Mills, most for lettings of small units of less than 150 sqm plus two sales of 400-500 sqm units. Second hand rents are around £3.50/sqft (£38/sqm). |
| Total | 148 | |

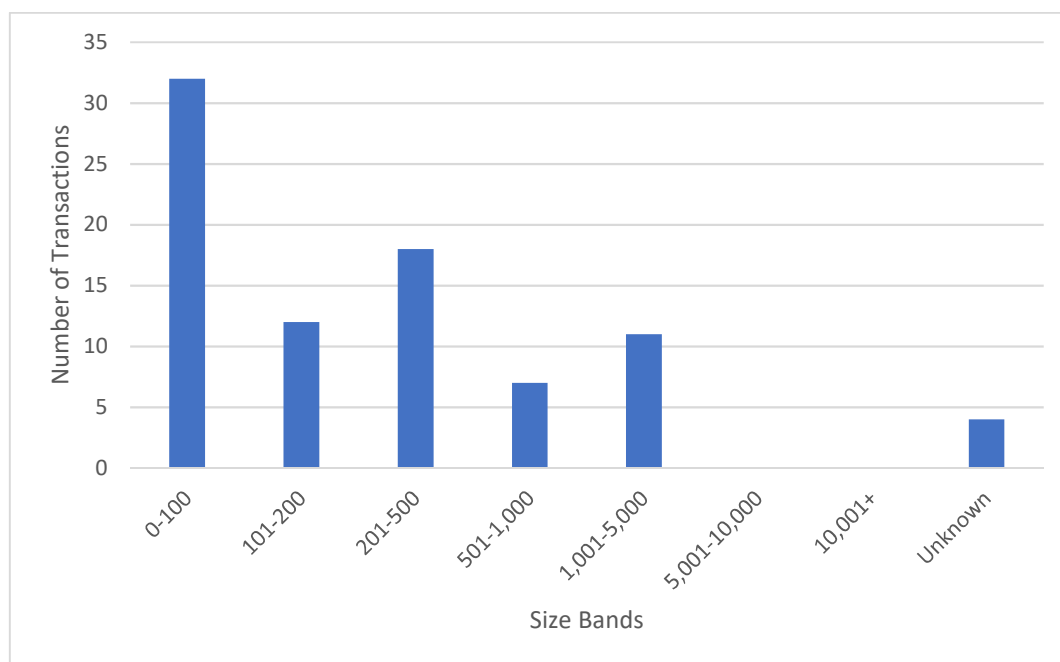
Source: BE Group, 2020

Office

- 4.25 84 office transactions have completed since 2010 in Stroud District, totalling 35,469 sqm of floorspace. Unsurprisingly, Figure 13 shows offices of the smaller size band, 0-100 sqm, were the most popular with 32 deals completing and accounting for 38 percent of the decade total. The number of deals fluctuates within the rest of the size bands, and no deal in the last 10 years has been recorded of more than 5,000 sqm.
- 4.26 2011 contained the largest number of office deals during a single year of 18, 21 percent of the decade total. Numbers then significantly reduced and have remained below 10 deals per year ever since. 2011 saw the largest amount of floorspace transacted during a single year, 12,198 sqm. Around a third of the floorspace transacted in the decade was in 2011.

4.27 The largest deal of the decade occurred in 2011 of 3,654 sqm, the Headquarters Office Building in Rowcroft, Stroud. The building was sold for an undisclosed price to Ecotricity.

Figure 13 – Office Transactions, 2010-2020



Source: Radius Data Exchange, 2020

Rents and Quality

4.28 The majority, 79 percent, of deals during the decade were let to various occupiers, whilst the remaining 21 percent (18 deals) were freehold transactions. A prime rent of £15.00 (£161.48/ sqm) was achieved at Unit 102, Stonehouse Park in 2012. The 300 sqm of office space was let to Redler Ltd on a 15-year deal.

4.29 Lease lengths on all office transactions ranged from one to 16 years. The largest of 16 years was completed in 2017 on 46 sqm at the Berkeley Centre, Gloucestershire Science and Technology Park. The space was let to Cavendish Nuclear.

4.30 Of the 66 office deals which were let in the last decade, 22 (33.3 percent) stated an achieved rent. These achieved rents give a guide to the quality of the premises let, based on the following assumptions:

- <£10.00/ sqft (£107.00/ sqm) – Poor Quality
- £10.00-15.00/ sqft (£107.00-161.00/ sqm) – Average Quality

- >£15.00/sqft (£161.00/ sqm) – Good Quality.

4.31 Offices of a poor quality accounted for 13 transactions; 59.1 percent of the total let with a rental figure stated. Units of an average and good quality, eight and one transactions respectively, accounted for 40.9 percent of transactions collectively. This shows a market focus on budget offices. However, this could also be an indication of low supply of better quality space. Also, it is noted that this data comes from only a third of transactions let in the last decade and so is largely an incomplete data source.

Sales

4.32 382 sqm at Tenens House, Kingfisher Business Park in Stroud was sold in 2016 for £747,517. The purchaser was Howard Tenens Ltd and this was the highest sale price to complete over the decade. Additionally, seven investment sales of offices occurred during the same time period. Of the deals displaying size information, the sale of the entire building of Palace Chambers on London Road in Stroud of 519 sqm was the largest of the decade. At a price of £900,000, this was also the highest achieved price of an investment sale when purchased by Sallowsquare Ltd. This was also the only deal which provided yield information, a net initial yield of 7.71 percent. Average sale prices are around £130/sqft (£1,400/sqm).

Transactions by Area

4.33 Table 21 shows the 84 office transactions from the last 10 years, split by area within Stroud District. Stroud was the prominent location accounting for 51 percent of these deals, followed by Stonehouse. Only 12 percent of office transactions have occurred outside of these locations.

Table 21 – Transactions split by Area

| Area | No. of Marketed Properties | Comments |
|-------------|----------------------------|---|
| Berkeley | 3 | Data not very reliable here as it appears to exclude deals at Gloucestershire Science and Technology Park (GSTP), thus real number of deals occurring here is seriously underestimated. The deals which are recorded are for small suites, in Berkeley itself of less than 100 sqm, achieving around £11/sqft (£118/sqm). |
| Cam/Dursley | 6 | Market activity is focused in Dursley Town Centre for suites of 80-400 sqm, all let and achieving around £8/sqft (£86/sqm). |

| | | |
|--------------|-----------|--|
| Quedgeley | 1 | One large office of 2,960 sqm at Quedgeley West Trading Estate on undisclosed terms. |
| Stonehouse | 31 | Market activity is focused at Stonehouse Park for larger suites and Bonds Mill for smaller properties. Average transaction was for around 400 sqm, with a diverse range of 17-2,500 sqm. For smaller suites the average transaction was for 88 sqm. Average rents are £6.30/sqft (£68/sqm) with best rents at Stonehouse Park being £15/sqft (£161/sqm). Stonehouse Park also saw three freehold sales of units of 170-320 sqm, achieving around £155/sqft (£1,668/sqm). |
| Stroud | 43 | Stroud Town Centre is a focus for around two thirds of these deals, with the rest occurring in several industrial estates. Most transactions are for smaller suites, an average of 147 sqm, with a range of 27-432 sqm. Only one very large office deal, for 1,532 sqm is recorded a Brimscombe Port Industrial Estate in 2018. Average achieved rents are £9.36/sqft (£101/sqm), with a range from £7-12/sqft (£75-129/sqm). 11 freehold sales are recorded, mostly in the industrial estates for an average of 924 sqm and a range from 126-3,654 sqm. Achieved sales values were around £130/sqft (£1,399/sqm). |
| Total | 84 | |

Source: BE Group, 2020

Rents

Industrial

- 4.34 Table 22 below shows the average rents being achieved for industrial units over the last decade, broken down by year. Of the 108 transactions, pricing information was available for 48 (44 percent).

Table 22 – Average Rents by Year, Industrial

| | No. of Deals | £/ Sqft | £/ Sqm |
|-------------|--------------|---------|--------|
| 2020 | ~ | ~ | ~ |
| 2019 | 5(8) | 3.72 | 40.05 |
| 2018 | 2(10) | 5.81 | 62.54 |
| 2017 | 7(11) | 6.61 | 71.56 |
| 2016 | 11(19) | 5.13 | 55.22 |
| 2015 | 3(9) | 4.05 | 43.60 |
| 2014 | 7(17) | 4.06 | 43.71 |
| 2013 | 5(13) | 5.25 | 56.52 |
| 2012 | 4(9) | 4.86 | 52.32 |
| 2011 | 2(7) | 4.39 | 47.26 |
| 2010 | 2(5) | 5.01 | 53.93 |

| | | | |
|--------------|---------|---|---|
| Total | 48(108) | ~ | ~ |
|--------------|---------|---|---|

Source: Radius Data Exchange, 2020

4.35 Rents have fluctuated in Stroud District over the last 10 years, with no more than two years of growth then followed by a lower average rent for the following year. This trend has seen the average rental level of industrial units fall by £1.29/sqft (£13.88/sqm) over the last ten years.

4.36 The highest average rent was seen in 2017 of £6.61/ sqft (£71.56/ sqm), provided by seven transactions. As seen no figure has been given for 2020, as when this report was being produced, no industrial deals had been recorded for this year.

Office

4.37 The average rents achieved for office units over the last decade in Stroud District, by year, is displayed in Table 23. From 66 leasehold office transactions completed, figures were available for 22 (33 percent) of the rents achieved.

Table 23 – Average Rents by Year, Office

| | No. of Deals | £/ Sqft | £/ Sqm |
|--------------|--------------|---------|--------|
| 2020 | ~ | ~ | ~ |
| 2019 | 2(7) | 11.25 | 121.11 |
| 2018 | 1(5) | 7.38 | 79.45 |
| 2017 | 2(7) | 9.37 | 100.87 |
| 2016 | 3(6) | 7.51 | 80.85 |
| 2015 | 1(4) | 5.14 | 55.33 |
| 2014 | 3(8) | 9.17 | 98.72 |
| 2013 | 5(7) | 7.87 | 84.72 |
| 2012 | 2(5) | 11.00 | 118.42 |
| 2011 | 2(11) | 9.37 | 100.87 |
| 2010 | 1(6) | 3.00 | 32.30 |
| Total | 22(66) | ~ | ~ |

Source: Radius Data Exchange, 2020

4.38 Similar to the industrial market, the rental market of offices in Stroud District has experienced fluctuation in average prices each year. A dip was seen in 2013, 2015 and again in 2018. The highest average rent was achieved most recently in 2019 of £11.25/ sqft (£121.11/sqm), however this information was gained from only two deals. Again, no office transactions have been recorded in 2020 as of time of writing.

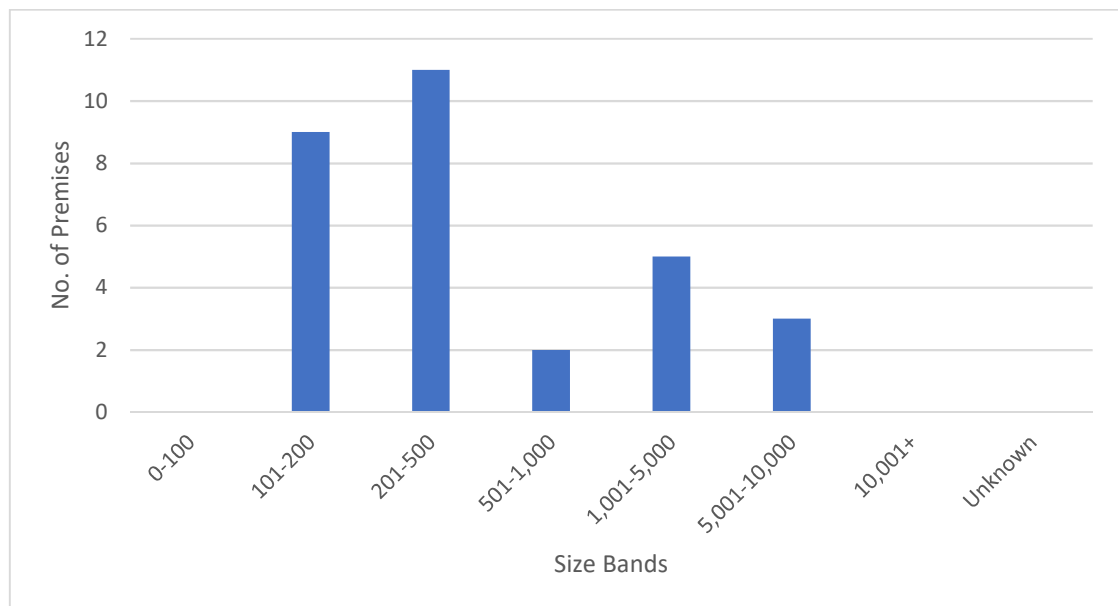
Property Supply

4.39 A schedule of vacant floorspace being marketed in Stroud District (as of June 2020) has been compiled from property websites such as Rightmove and commercial property agents' websites. This will only represent a portion of the true vacancy rate as there will be some poor quality floorspace which is vacant and not being marketed, particularly in the Stroud Valleys, including facilities at Brimscombe and Thrupp being held empty for future regeneration plans. The vacancy schedules can be found in Appendix 3.

Industrial

4.40 30 industrial premises are currently being marketed in Stroud District, comprising 35,556 sqm of floorspace. Around a third of the available units are 201-500 sqm in size, with another third being of 101-200 sqm. As Figure 14 shows, there is modest availability in larger size brackets, up to around 6,800 sqm.

Figure 14 – Amount of Marketed Property, Industrial



Source: BE Group, 2020

4.41 The largest industrial unit being marketed is Unit 3, St Modwen Park, Quedgeley. The unit of 6,837 sqm was speculatively built and completed in December 2019. The unit is being marketed to lease with a price to be given on application. This unit represents almost 20 percent of the total industrial floorspace being marketed within Stroud District.

4.42 19 of these properties (63 percent) are being marketed to let, with the remaining six (20 percent) to buy and five properties are being marketed to lease or buy (17 percent).

4.43 Like with transactions, the supply of marketed space in Stroud District can also be graded on its quality. From the 19 properties to lease, 11 (57.9 percent) are stating an asking rent. These achieved rents give a guide to the quality of the premises let, based on the following assumptions:

- <£2.50/ sqft (£27.00/ sqm) – Poor Quality
- £2.50-5.00/ sqft (£27.00-54.00/ sqm) – Average Quality
- > £5.00/sqft (£54.00/ sqm) – Good Quality.

4.44 Of these properties, eight are listed as of good quality, whilst the remaining three are of an average quality. This data shows no poor/ budget quality space being marketed within Stroud District. This would follow recent transactional trends of space being taken being of a moderate or higher quality. It is also likely that a lot of budget quality space is being transacted informally, without the use of agents and so not being recorded as an availability or a deal.

4.45 Quedgeley/Hardwicke has the largest number of available premises at eight, spread across the modern industrial estates of the area. Dursley has seven available units, all but one at Phase II of Littlecombe Business Park where six new units are being marketed, most of 126 sqm. Table 24 shows a breakdown of the number of marketed properties by area.

Table 24 – Marketed Properties by Area

| Area | No. of Marketed Properties | Comments |
|---------------------|----------------------------|---|
| Breadstone | 1 | Unit of 464 sqm |
| Brimscombe | 1 | Unit of 372 sqm offered freehold at £56/sqft (£603/sqm). |
| Cam/Dursley | 7 | Most availability is at Littlecombe Business Park, for units of 126 sqm. |
| Quedgeley/Hardwicke | 8 | Focus for the supply of larger industrial and warehouse units of more than 3,600 sqm in size at St Modwen Park and Quadrant 12. |
| Nailsworth | 2 | Two units at Spring Mill Business Park of 220-1,400 sqm |
| Sharpness | 1 | 931 sqm available at Severn Distribution Centre |
| Stonehouse | 4 | Spread across several estates, none appear to be in the core areas of Oldends Industrial Estate or Stonehouse Park/Bonds Mill. Includes |

| | | |
|--------------|-----------|--|
| | | one large property of 3,586 sqm unit at Upper Mills Trading Estate, offered freehold. Other units are sub 340 sqm in size. |
| Stroud | 6 | Availability spread across three industrial estates, good quality units of 110-650 sqm, quoting rents at £6-6.50/sqft (£65-70/sqm) |
| Total | 30 | |

Source: BE Group, 2020

4.46 There are several other industrial schemes in the pipeline within Stroud District including:

- Units 1-4 at Gloucester (Quadrant) 12 Business Park located off J12 of the M5. Units will be of 1,500-3,800 sqm and available to lease/ buy
- Built to suit options in phase II of St Modwen Park, Quedgeley. Space available up to 40,000 sqm
- Two units of 1,860 sqm and 4,180 sqm are available for design and build at Stroudwater Business Park, West of Stonehouse
- Planning has been approved for the construction of three units at Severn Distribution Park, Berkeley. These units range from 1,400-22,000 sqm.

4.47 From the last Employment Land Study 2013, the amount of marketed industrial space in October 2012 was 60 premises and 58, 821 sqm of vacant floorspace. The number of marketed properties is now 50 percent less and there is almost 40 percent less floorspace being marketed. This suggests a strong market in Stroud District for industrial space in 2020, against supply, compared to that seen in 2012.

Office

4.48 There are currently 63 office premises being marketed within Stroud District, totalling 12,584 sqm of floorspace. As Figure 15 shows, the majority of units are less than 100 sqm, 60 percent of the total. There are no office premises available of more than 5,000 sqm.

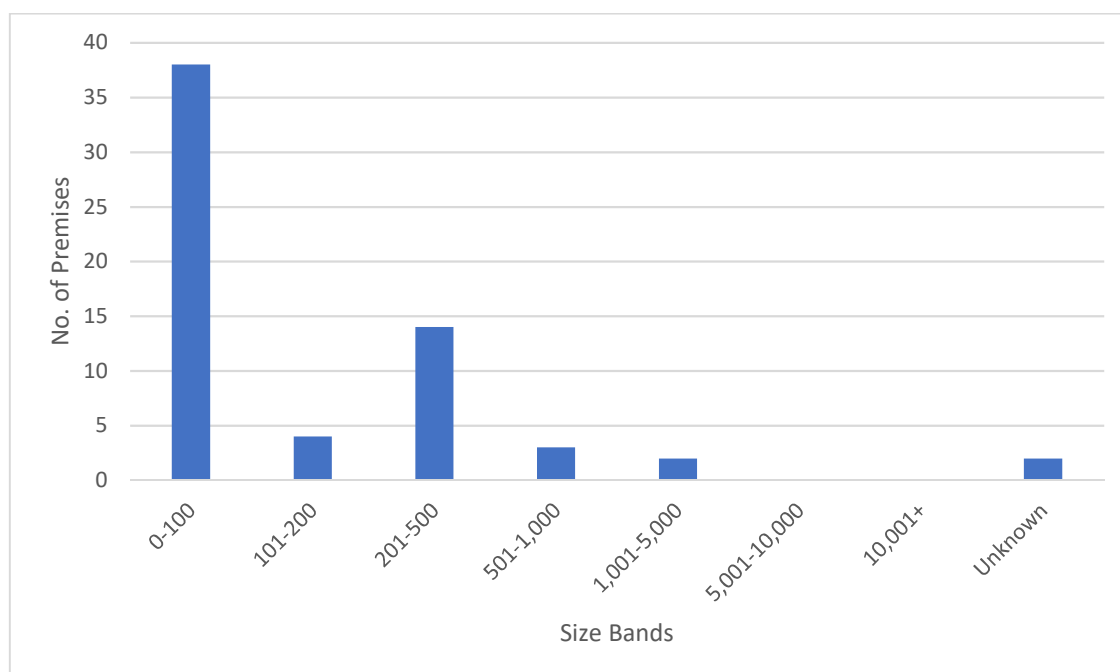
4.49 The largest office is being marketed is the John Collier Building at Berkeley Technology Centre. The 2,769 sqm building is marketed freehold for a price given on application. This building comprises 22 percent of marketed office floorspace.

4.50 56 of these properties (89 percent) are being marketed as leasehold, with only four (six percent) available to buy. There are also three properties (five percent) to buy/ rent.

4.51 Of the 56 office deals which are being marketed as available to let, 46 (82.1 percent) stated a quoting rent. These quoting rents give a guide to the quality of the premises let, based on the following assumptions:

- <£10.00/ sqft (£107.00/ sqm) – Poor Quality
- £10.00-15.00/ sqft (£107.00-161.00/ sqm) – Average Quality
- >£15.00/sqft (£161.00/ sqm) – Good Quality.

Figure 15 – Amount of Marketed Property, Office



Source: BE Group, 2020

4.52 Most of the offices marketed to lease, 21 (45.7 percent) are of good quality. Combined with 13 offices of average quality listed, these two categories account for almost three quarters of the marketed space in Stroud District. 26.0 percent of the space marketed is of poor quality.

4.53 27 individual office units are being marketed in Stroud town, the most in any one area. Within Stroud these are spread throughout the town, with five suites of less than 20 sqm each found at 10, John Street. Additionally, office space which is counted within Stroud is not just in the town centre but also in surrounding business parks/ estates. Within Stonehouse, there are 20 marketed office premises, the majority of these are

found within Stonehouse Park or the rural scheme Westend Courtyard. Table 25 shows a breakdown of number of marketed properties by area.

4.54 As of October 2012, in the 2013 Employment Land Review, there were 61 vacant office premises totalling 8,703 sqm of floorspace. Whilst the number of premises is roughly similar, the total floorspace is less, with 12,584 sqm of marketed office floorspace being recorded in May 2020. This is a 45 percent increase on the figure in October 2012 and indicates that more larger suites are on the market today, particularly the two large office properties at Gloucestershire Science and Technology Park (GSTP).

Table 25 – Marketed Properties by Area

| Area | No. of Marketed Properties | Comments |
|------------|----------------------------|--|
| Berkeley | 2 | Two large suites at GSTP of 1,486-2,769 sqm, one offered leasehold, one freehold. |
| Brimscombe | 5 | Suites of 55-274 sqm at various Mills offered at £6.5-12/sqft (£70-129/sqm). Mostly average quality. |
| Dursley | 3 | Suites in Dursley Town Centre of 41-121 sqm, quoting rents at £8.3-9.3/sqft (£90-100/sqm) of varying quality |
| Eastington | 1 | Suite of 221 sqm at Eastington Trading Estate, offered leasehold |
| Nailsworth | 4 | Diverse range of suites from 20-239 sqm in size in mixed industrial estate and town locations. Mixed leasehold and freehold options, mostly of average quality. Quoting rents at £11-12/sqft (£118-129/sqm), plus one exceptional quote of £22/sqft (£237/sqm) for a good quality suite. |
| Sharpness | 1 | Former Customs House, the Docks – 173 sqm, quoting rent of £5.3/sqft (£57/sqm). |
| Stonehouse | 20 | Diverse offer of suites ranging from 13-530 sqm mostly leasehold, with the two properties of 530 sqm available for sale or let. The focus for supply is Stonehouse Park, in several multi-let schemes, and Westend Courtyard. Most of good or average quality. Quoting rents at Stonehouse Park are £8-18/sqft (£86-194/sqm). Quoting rents at the serviced Westend Courtyard are up to £30/sqft (£323/sqm). |
| Stroud | 27 | Again, diverse availability, with units of 10-516 sqm, but with a strong emphasis on sub-100 sqm units focused in the Town Centre. Quoting rents for smaller suites are £13-28/sqft (£140-301/sqm). |

| | | |
|--------------|-----------|---|
| | | Most suites are of average or good quality. |
| Total | 63 | |

Source: BE Group, 2020

Valuation Office Data

- 4.55 The Valuation Office Agency (VOA) provides data on the overall number of business premises (hereditaments) and overall floorspace by broad use type, including offices and industrial/ warehousing. According to the latest VOA statistics (2016), there were 1,520 industrial hereditaments and 700 office hereditaments within Stroud District, totalling 914,000 sqm and 92,000 sqm respectively.
- 4.56 Comparing these VOA figures to the vacancy schedules above can provide an indication of the overall occupancy rate of the commercial premises. The occupancy rates are estimates only, due to the different timeframes of the two sets of data (VOA data and vacancy schedules) and as some floorspace may be vacant but not being marketed/marketed without involving agents. However, they do provide a reasonable indication of the overall performance of the market.
- 4.57 Occupancy rates of 90-95 percent can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. A high occupancy rate is an indicator of a full market with businesses potentially having difficulties in finding adequate premises. A low occupancy market indicates long-term un-occupied and derelict stock, and poor business growth.
- 4.58 As of May 2020, there were some 35,556 sqm of industrial space and 12,584 sqm of office space, which equates to occupancy rates of 96.1 percent for industrial and 86.3 percent for office space. By number of units the occupancy rates are 98.0 percent for industrial, 92.0 percent for offices. These occupancy rates suggest a well performing industrial market in Stroud District with some undersupply of premises against demand. Occupancy rates for offices are lower, suggesting more modest demand against supply, although not significantly so.

Property Market Stakeholders

- 4.59 This section provides qualitative evidence of the demand, activity levels in relation to spatial and size differences, key market interests and weaknesses in the market for

industrial and office property within Stroud District. This data was gained through consultations with active commercial property agents in Stroud District.

4.60 To protect anonymity of individuals and organisations, names of commentators are not given. These views are the opinions of the representatives of the consulted organisations at the time of consultation, and are not the view of Stroud District Council or BE Group, the consultants.

4.61 The views have been summarised in a series of tables. Tables 26 and 27 provide a breakdown of the general comments received regarding industrial and office premises within the District.

Table 26 – Property Market Comments, Industrial

| Contact | Comment |
|--------------|---|
| Local Agents | <ul style="list-style-type: none"> • Rural areas are very popular – had a converted barn which let very quickly for £16,500/ annum. • Rates are a big issue in the rural areas • Small properties such as the old mills/ barns are very easy to let • Great demand for rural areas but need more space • Modern developments would work in rural areas. • M5/Stonehouse is the best place for future development – linked to the strategic motorway network and established market. • Sharpness area is not too isolated – there is reasonable access and demand even though a less popular location than M5 corridor • New Town settlement will be a good draw to the area and bring in amenities to serve commercial uses at Sharpness. |
| Local Agents | <ul style="list-style-type: none"> • Industrial market has always been robust – even through the current Covid-19 pandemic • Occupiers have tended to want freehold opportunities more than leasehold • Occupiers are mainly local. Businesses tend to stay in the area and expand. Businesses tend to look around the M5 area of Stroud/Gloucester when expanding as there is more space available here. • Best location for future development is J12/13 of M5 • This location has the best accessibility and modern units • New development here should be any size up to 5,000 sqm. £7/ sqft (£75/ sqm) could be achieved here • Also, pent up demand for units of 1,000 sqm • Sharpness offers basic units at low prices- suitable for occupiers seeking budget space. |

| | |
|--------------------|---|
| Local Developer | <ul style="list-style-type: none"> • Owners/developers at Aston Down • Demand is very good – scheme been at full occupancy since 2014 • Vacancies are filled very easily • Need to be allowed growth as demand is so high • Unsure how it will go with new development, will people want that as much as the historic hangers/ character space? Had one enquiry over lockdown for 1,000 sqm who wants new space here so believe demand should be ok for modern development • Some existing tenants may move to new space and free up some of the older units for businesses not needing modern space and therefore wanting to pay cheaper rents. • Enquiries are mainly coming from business in the Stroud Valleys who are in buildings which are being redeveloped/ repurposed • Benefit from location, low density layout, lots of car-parking, open estate • Loyal tenants. Rents: <ul style="list-style-type: none"> ○ Around 4,500 sqm - £2.50-2.70/ sqft (£27-29/ sqm) ○ Around 1,600 sqm) - £3.50-3.75/ sqft (£38-40/ sqm) ○ Around 140 sqm - £4.50/ sqft (£48/ sqm) ○ New development to be marketed at £7-7.50/ sqft (£75-80/ sqm). |
| Regional Agents | <ul style="list-style-type: none"> • Not marketing much industrial space currently in Stroud • Recent scheme has had commercial land lost for the development of a supermarket. Rents here are £4/ sqft (£43.06/ sqm) • Used to be agents at Stroud Trading Estate where rents were reaching £7-8/ sqft (£75-85/ sqm). |
| National Agents | <ul style="list-style-type: none"> • Stonehouse is popular location for demand – particularly Stroudwater/Oldends Road • Many businesses are loyal to the area and so a lot of demand comes from existing businesses looking to expand • Many companies who are start-ups do not move from the area e.g. Renishaw. • Future development could be speculative or Design & Build – although the latter tends to be for large regional companies • Speculative development should be for all sizes up to 5,000 sqm • Development should be focused around Stonehouse and M5 Junction 13 • Overall, new development is needed in Stroud District as there is demand. |
| National Developer | <ul style="list-style-type: none"> • Marketing premises at Quedgeley/Hardwicke. • Demand from regional/national businesses, most with an existing Gloucester presence. Mid-box units of 2,000-5,000 sqm are in demand. Larger units of 5,500 sqm or more take longer to let. |

| | |
|--------------------|--|
| | <ul style="list-style-type: none"> Achieved rents are £6.75/sqft (£73/sqm). Intend to go to £6.95/sqft (£75/sqm) in the next phases of development to reflect increased construction costs. Ultimately aiming for £7/sqft (£75/sqm) which is still cheaper than equivalent rents in Bristol - £7.50/sqft (£81/sqm). Saw a healthy number of enquiries pre Covid-19, still seeing interest from logistics sector. |
| National Developer | <ul style="list-style-type: none"> Developing plots for units of 2,000-5,000 sqm at West of Stonehouse. Good demand from large firms already in Stonehouse/Stroud, attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 2,000 sqm or more with rents of £7-7.50/sqft (£75-81/sqm) being achieved. |

Source: BE Group's consultations with property market stakeholders, 2020

Table 27 – Property Market Comments, Office

| Contact | Comment |
|----------------------|---|
| Local Agents | <ul style="list-style-type: none"> Demand is mainly from local businesses already in the area or start-ups In rural areas, farm conversions always let well Requirements for this area are no more than 500 sqm Could be a market for some small schemes – would have to be small, spec build units To build anything over 500 sqm would need to be pre-let as otherwise the risks are too high Trend from Covid pandemic of companies downsizing and therefore larger stock is now becoming available |
| Sub-Regional Manager | <ul style="list-style-type: none"> Operate the GSTP Great strategic location between Bristol, Gloucester and Cheltenham Ideal for companies not wanting to be in city centres but still in a hub of activity GSTP helps to spread out the economic activity High levels of demand for the park – whenever a building is finished it is easily lettable however the process is slow due to funding The park refurbishes old buildings, and this requires funding to do so Covid and Brexit have made investment difficult – wish to gain more help from local authorities |
| Regional Agents | <ul style="list-style-type: none"> Good demand for the rural areas, particularly Old Mill buildings, as long as they have been re-furbished with modern facilities i.e internet and phone lines Rents are typically £10-12/ sqft (£107-130/ sqm) Demand typically for suites of 65-140 sqm Supply is good in rural areas – no need for modern development here Not many freehold opportunities though Small rural units are typically to lease, which suits occupiers who want flexibility. |

| | |
|-----------------|--|
| | <ul style="list-style-type: none"> • A lot of businesses in the creative industry in Stroud District, along with the usual office sectors e.g. IT. |
| National Agents | <ul style="list-style-type: none"> • Has not been a lot of demand during the pandemic so difficult to judge the current market • Most demand generally however is received for Stonehouse, which is the focus for speculative development • Modern space achieving £16.50/ sqft (£177.60/ sqm) • Future development should be of up to 500 sqm • Future growth should be focused around Stonehouse, A419 and M5 Junction 13. • Supply in Stroud Town Centre is above shops with limited car parking • Achieving no more than £10/ sqft (£107.65/ sqm) • Future development should be of no more than 90-140 sqm in size. • A small rural scheme could work away from the main towns/ M5, for companies wishing to be in a rural setting • Marketing The Mill, Brimscombe Port which has recently been refurbished • Units of 93-185 sqm are letting for up to £7/ sqft (£75/ sqm). High service charges of £4/ sqft (£45/ sqm) equate to a total letting fee of around £11/ sqft (£118/ sqm) – similar to rents in Stroud Town Centre • Doesn't believe there is enough demand right now to warrant any new development in rural areas – enough rural buildings to accommodate demand. |

Source: BE Group's consultations with property market stakeholders, 2020

4.62 Stroud District has a strong industrial and warehouse property market which is, so far at least, not being significantly inhibited by the Covid-19 pandemic. Demand is coming from existing local firms from Stroud District/Gloucester looking to grow and there is a clear focus on the M5 Corridor area for demand from larger businesses, specifically Junctions 12-13, extending to Stonehouse. Requirements are for units of up to 5,000 sqm with a particular need for 1,000 sqm properties. Rents of £7/ sqft (£75/ sqm) are achievable at present, which makes the Gloucester/Stroud area more affordable than Bristol. There is also a need for freehold options.

4.63 Stroud District also has an active rural industrial market comprising agricultural conversions and developed schemes such as Aston Down. In part this is driven by relocations out of the older premises of the Stroud Valleys to more modern, but still accessible and affordable locations in rural areas.

- 4.64 While the Sharpness area mostly serves a budget market at present, it was felt there is scope for growth, particularly if part of a wider new settlement proposal. The area is accessible and could be a focus for demand, albeit secondary to the M5 Corridor.
- 4.65 The office market is mainly local, comprising existing firms looking to grow, plus some start-ups. Stonehouse has been the focus for growth in recent years and now has a critical mass of E(g) (i) premises. Any future large-scale growth in offices is likely to be focused here.
- 4.66 Elsewhere, needs are met in multi-let schemes, primarily farm conversions or the refurbishments of historic mill properties. There is some market for further such schemes, primarily for suites of less than 500 sqm and particularly less than 140 sqm. It was felt the Covid-19 pandemic is encouraging some companies to downsize which could free up larger offices for sub-division to meet smaller business needs. Rents are typically £10-12/ sqft (£107-130/ sqm) for refurbished space and up to £16.50/ sqft (£177.60/ sqm) for more modern options.
- 4.67 Stroud Town Centre is a key local office market but not superior to Stonehouse or many strong rural locations. Average rents here are £10/ sqft (£107.65/ sqm). At Berkeley, the GSTP is enjoying high demand due to the quality of its offer and its strategic position between Bristol, Gloucester and Cheltenham.

Green Business Parks

- 4.68 Research has been collected in response to the proposed employment site at M5 Junction 13. This proposed site will be largely occupied by Ecotricity, a large local company who are one of Britain's key green energy providers. It aims to occupy the site, and provide space for other companies specialist to the green sector.
- 4.69 Research has been collected on examples of green business parks within the UK. This follows on from data collected on the size of the green economy in Stroud District (Section 3.0).
- 4.70 Research has been collected on successful green business parks in the UK in relation to their property, services, functionality and businesses. Table 28 gives examples of business parks which actively promote themselves as being 'Green'.
- 4.71 In all cases the 'Green' element comes from the environmentally friendly and sustainable nature of construction, and the services/facilities offered, not the nature of

the businesses occupying the park. Indeed, three of the parks have a fairly standard range of business park occupiers, including larger financial/legal companies and ICT companies. Winnersh Triangle Technology Park has a focus on businesses in science and technology sectors but does not, it is understood, place formal restrictions on what type of businesses can occupy space or clearly define what sectors fall into 'science and technology.'

Table 28 – Green Business Parks in the UK

| Name | Location | Green Elements | Commercial Space | Tenants |
|-----------------------------|-----------------|--|--|--|
| Filwood Green Business Park | Bristol | <ul style="list-style-type: none"> Outstanding – BREEAM rating Specifically designed to achieve 40 percent CO2 reduction, saving 46 tonnes of CO2 annually Electric charging points Sedum green roofs Photovoltaic panels Low water use appliances 84 percent recycled furniture 40 percent renewable energy produced on site. | <ul style="list-style-type: none"> Aimed at small businesses seeking E(g)/B2 space Office space of 12-36 sqm to let 28 light industrial units of 46-146 sqm to let Communal Workhub. | <p>The site is home to 43 local companies from sectors including:</p> <ul style="list-style-type: none"> Construction Digital Media Property Solicitors IT Electricity. |
| St Austell Business Park | Cornwall | <ul style="list-style-type: none"> Excellent – BREEAM rating Insulated cedar clad buildings with wooden walkways Recyclable aluminium roofs and solar panels to provide power for all units Renewable energy sources Solar water heating Rainwater recycling Low energy light fittings and movement sensitivity for lights to reduce power consumption. | <ul style="list-style-type: none"> 22 office units As of July 2020 only one office left Serviced office space (short or long lease terms) Hot-desking Conference Centre. | <p>14 tenants on site, ranging from start-ups to established companies with sectors including:</p> <ul style="list-style-type: none"> Solicitors (<i>Coodes</i> – One of Cornwall's largest law firms) Education Construction (TClarke – National building services contractor) Food services Finance Engineering, |

| | | | | |
|-----------------------------------|---------|---|---|--|
| Green Park | Reading | <ul style="list-style-type: none"> • Excellent – rating from BREEAM • Electric car ports • Renewable energy sources • Energy efficient services, plants and equipment • Green Park train station to be complete in 2020. | <ul style="list-style-type: none"> • Office suites available from 45 sqm • Conference Centre • 92,890 sqm of new development has been approved • Two new buildings of 10,860 sqm to be ready by September 2020. | <p>Range of companies including national/global occupiers in sectors including:</p> <ul style="list-style-type: none"> • Finance (HSBC) • Property (Regus) • IT (Logica) • Communications (Cisco Systems). |
| Winnersh Triangle Technology Park | Reading | <ul style="list-style-type: none"> • Very Good – rating from BREEAM • Rainwater harvesting • Solar efficient glazing • Electric car ports • Free bikes • Car-sharing initiatives • Refurbish buildings to 'as-new' standard. | <ul style="list-style-type: none"> • Office suites available from 220-4,180 sqm • Warehouse space available from 1,488-1,575 sqm • New building under development of 9,760 sqm | <p>Occupied by companies in the science and technology sectors Understood not to have formal restrictions on who can occupy, however.</p> |

Source: Individual Websites, 2020

4.72 The concept of a 'Green' Business Park appears to be about offering the highest standard of accommodation and facilities to attract modern, high value occupiers from a wide catchment.

4.73 'Green' features of the business parks include the use of solar panels, rainwater harvesting, and renewable construction materials along with an aim to be energy efficient. Additionally the services that they are offering e.g. promoting the use of bikes and electric car ports are also 'green' in their nature.

4.74 Three of the four Case Studies, noted in Table 28, achieved a Building Research Establishment Environmental Assessment Method (BREEAM) Excellent or Outstanding grade. BREEAM is a complex assessment of building management, health/wellbeing provision, energy use, access, water use, resource use, resilience, land use/ecology and pollution output. Key physical features of a BREEAM Excellent or Outstanding scheme are likely to include:

- Renewable energy generation capacity (i.e. solar)

- Access by alternative modes of transport
 - Energy efficiency in all systems
 - Water efficient systems, facilities for on site water recycling
 - Reuse and recycling facilities
 - Planted areas of greenspace.
- 4.75 Research suggests that the top tiers of BREEAM reduce carbon emissions by 35-55 percent.
- 4.76 All of these business parks appear to be successful, with high occupancy rates and a reasonable mix of local and regional/national firms. This suggests the 'green' elements of development and operation are proving attractive to businesses or at least are not adding unsustainable costs to their occupancy on site.
- 4.77 Moving forward with the proposed Eco Park at M5 Junction 13, the Council would have the ability to put measures in place to ensure that construction and services of the park were sustainable and suitable for the 'green' nature of the site. However, from existing experience, limiting the scheme to occupiers who contribute towards the 'green' sector is more likely to be the role of the owner/estates manager/ sales team, as opposed to something that should be enforced during the planning stage.

Summary

- 4.78 Online retail and supermarket demand is surging during the Covid-19 pandemic, producing a knock on effect of new warehouse requirements with some 465,000 sqm of additional space required nationally. In the South West there is a shortage of larger, 20,000 sqm plus logistics units. Quedgeley/Junction 12, M5 remains a focus for B2 and B8 development in the Gloucester market, with only Gloucester Business Park offering significant competition. Headline rents are £7/sqft (£75/sqm) with prime rents reaching £8.50/sqft (£92/sqm).
- 4.79 Both Cheltenham and Gloucester are dominated by their out of town office markets. In Gloucester's case activity is focused at Gloucester Business Park, Tewkesbury. Gloucester and Bristol are both losing city centre stock to residential conversions, creating a need for new options elsewhere. Key for the wider county will be the delivery of Cheltenham Cyber Business Park next to the GCHQ facility. The 220,000 sqm Park

will focus on cyber-security but is expected to draw in a lot of demand from Gloucestershire's ICT sector generally.

- 4.80 While Covid-19 has required a large proportion of the UK's office based workforce to work remotely, there will still be a need for E(g) (i) office space in the future. This will include serviced offices which may provide workers with attractive alternatives to homeworking and larger floorplate offices which give workers the space to achieve social distancing. The Covid-19 inspired lockdown has had varying effects across the manufacturing sectors, aviation and automotive have declined while producers of medical supplies and many household goods have seen demand spike. Experience at schemes such as St Modwen Park and West of Stonehouse suggests that B2 and B8 demand is holding up well so far in 2020, with B8 demand particularly benefitting from growth in e-commerce.
- 4.81 In terms of completed property deals, most industrial transactions were either for 201-500 sqm or 1,001-5,000 sqm units. Leasehold deals were most common for good or average quality offices. Market activity was strongly focused at Stonehouse and Hardwicke/Quedgeley. Deals at Stonehouse were for an average of 1,000 sqm. Second hand rents were around £6/sqft (£65/sqm) while freehold values were around £83-93/sqft (£900-1,000/sqm). Units of 1,000-4,000 sqm were taken up in Hardwicke/Quedgeley. Achieved rents were £5.50-6.50/sqft (£59-70/sqm). Freehold sale values were at £100-150/sqft (£1,076-1,614/sqm) for new build units.
- 4.82 Office deals were primarily for small 0-100 sqm budget quality offices. A prime rent of £15.00 (£161.48/ sqm) was achieved at Stonehouse Park. Market activity is focused in Stroud town and Stonehouse. Most transactions in Stroud town are for smaller suites, an average of 147 sqm. Average achieved rents were £9.36/sqft (£101/sqm). Achieved sales values were around £130/sqft (£1,399/sqm). At Stonehouse Park the average transaction was for around 400 sqm, with a diverse range of 17-2,500 sqm property transacted. For smaller suites the average transaction was for 88 sqm. Average rents were £6.30/sqft (£68/sqm). Stonehouse Park also saw freehold sales of units of 170-320 sqm, achieving around £155/sqft (£1,668/sqm).
- 4.83 30 industrial premises were on the market in Stroud District in June 2020, comprising 35,556 sqm of floorspace. Most were 100-500 sqm in size, to let and of good quality. Quedgeley/Hardwicke has the largest number of available premises at eight, spread across the modern industrial estates of the area.

- 4.84 There were 63 office premises being marketed within Stroud District, totalling 12,584 sqm of floorspace, mostly small, good quality suites of 0-100 sqm, to let. Stonehouse and Stroud town are the focus of supply.
- 4.85 By most measures, local occupancy rates are well above 90 percent for industrial and, to a lesser degree, office space. This suggests an undersupply of premises against demand.
- 4.86 Property market stakeholders report that Stroud District has a strong industrial and warehouse property market. Demand is coming from existing local firms from Stroud District/Gloucester looking to grow and there is a clear focus on the M5 Corridor area for demand from larger businesses. Requirements are for units of up to 5,000 sqm with a particular need for 1,000 sqm properties. Rents of £7/ sqft (£75/ sqm) are achievable at present. There is also a need for freehold options. Stroud District also has an active rural industrial market. In part this is driven by relocations out of the older premises of the Stroud Valleys.
- 4.87 The office market is mainly local, comprising existing firms looking to grow, plus some start-ups. Stonehouse has been the focus for growth in recent years and now has a critical mass of premises. Elsewhere, needs are met in multi-let schemes primarily farm conversions or the refurbishments of historic mill properties. There is some market for further such schemes, delivering smaller suites. Stroud Town Centre is a key local office market but not superior to Stonehouse or many strong rural locations.
- 4.88 Research has been collected on successful 'green' business parks in the UK in relation to their property, services, functionality and businesses. In all cases the 'green' element comes from the environmentally friendly and sustainable nature of construction, and the services/facilities offered, not the nature of the businesses occupying the park, indeed most have a fairly standard range of occupiers and do not try to limit occupancy to set sectors.

5.0 STAKEHOLDER AND BUSINESS CONSULTATIONS

Introduction

5.1 This section provides commentary about Stroud District, drawn from consultations with the public sector, GSTP, key developers/landowners, and major businesses. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture. Discussions with private sector developers and property agents are outlined in section 4.0, Property Market Assessment. A list of the organisations, businesses and commercial property agents spoken to within the study is listed in Appendix 1.

GFirst Local Enterprise Partnership (LEP)

5.2 Inward investment and economic development officers for GFirst were contacted to discuss the commercial property market and key growth sectors of relevance to Stroud District. GFirst noted that Stroud District is very well positioned on the M5 Corridor in southern Gloucestershire, between Bristol and Gloucester. This is a key location for motorway linked B2/B8 developments, and further large-scale industrial/logistics developments could work at any of the District's motorway junctions.

5.3 GFirst activity focuses on some key growth sectors for Gloucestershire:

- Advanced Manufacturing
- Cyber Security
- Agri Tech
- Renewables.

5.4 Of these, Advanced Manufacturing and Renewables are most of relevance to Stroud District. Stroud is home to some major employers in these sectors, such as Renishaw and Ecotricity. Both companies have large supply chains but have historically been prevented from linking up to those chains as their main facilities are on constrained sites. This has prevented the development of technology parks such as the cluster at Gloucester Airport. Plans are in place that will change this, however.

GSTP – Berkeley Cluster

5.5 GSTP has proved highly successful in attracting advanced manufacturing firms to a previously empty site and has become an important centre for start-ups. The link to the South Gloucestershire and Stroud College, which operates various skills/training

centres on site, is key to help growing businesses as it gives them easy access to apprentices. Premises are affordable although older so are unlikely to attract major employers who want top quality accommodation. Also, there is a limit on HGV movements through Berkeley Village which means GSTP is unlikely to attract larger B2/B8 firms.

Sharpness Docks

- 5.6 Established centre for recycling and bulky goods. GFirst feel it lacks the position and critical mass to attract higher value Eco Technology firms, which will more naturally go to Stonehouse with its direct M5 links.

Sharpness Eco Settlement (Sharpness New Settlement)

- 5.7 As is noted below and in Section 7.0, it is proposed that some, or all, of the employment allocation will comprise a business park for knowledge-based businesses. GFirst feel this will be hard to deliver in practice for several reasons:

- The high-grade premises required will be expensive and hard to deliver viably
- Will need an experienced developer partner, also partners willing to accept long term management responsibility to attract occupiers and maintain to a high standard
- Given the isolated position of the site it was felt that this would not work unless the 'Knowledge Park' can attract an anchor tenant who will bring in others.

- 5.8 Given these issues, and notwithstanding statements made by the New Settlement's owners and agents, it is felt there will be strong pressure for the development partners to avoid a high risk specialised business park development and just deliver basic B2/B8 units here.

Cyber Security

- 5.9 It is expected that further growth of this sector will focus on the Golden Valley development in West Cheltenham, where GCHQ is the anchor. This development is expected to draw in a lot of ICT businesses from across Gloucestershire.

Regional Trends

- 5.10 Several broader regional trends were noted which may be of relevance to Stroud District:

- The B8 logistics requirements of e-commerce businesses, already high, have grown still further during the Covid-19 pandemic, with a focus on the M5 and M4 junctions
- Biotech – High level medical research will remain focused around the Cambridge-Oxford-London triangle but there are opportunities for equipment manufacture in the South West, especially Personal Protective Equipment (PPE) as the UK seeks to become more self-sufficient in PPE following Covid-19
- Food and Drink – Strong growth market as Made in UK becomes a more important brand following Brexit. The South West has a number of strong brands including Lucozade-Ribena, but there is no particular focus of food sector businesses in Stroud District
- Financial Services – More companies are moving out of London as City rents and living expenses rise and the need for a central location becomes less important. Feels that Stonehouse is well placed to attract some employers, but Gloucestershire is held back more generally by only having lower tier Universities and a more limited graduate pool to draw from.

South Gloucestershire and Stroud College (SGS Commercial Services)

- 5.11 SGS Commercial Services are the owners of the Gloucestershire Science and Technology Park (GSTP) and a subsidiary of South Gloucestershire and Stroud College. GSTP is one of the College's two campuses, the other being in Stroud town.
- 5.12 SGS purchased half of the Berkeley nuclear site, some 16 ha and transformed this into GSTP, housing school, college, some university campus' facilities, and science/research businesses. The Park is well-occupied with high levels of demand received. The ethos of the site is for the education and business occupiers to work together to allow skills to be transferred and developed across all aspects of the park. GSTP also helps spread commercial opportunities out across the District, rather than focusing employment solely in the town centres and on motorway corridors.
- 5.13 Commuter access has always been gained through Berkeley Village centre, with no major problems. However, there is no access for large distribution/HGV vehicles. The closest rail station is at Cam, however a new commuter rail station at Sharpness would be hugely beneficial.

- 5.14 Future growth plans involve the refurbishment of all existing buildings, although the process is slow due to funding constraints. Then will begin new development on any remaining brownfield land. In three-five years, the plan is to expand onto the neighbouring 16 ha site, once decommissioning of the nuclear station is complete. Development here will take a further five years and focus on provision of further offices and workshop space, with the potential expansion of the school.
- 5.15 SGS are supportive of proposals for a new settlement at Sharpness. It is felt this will attract more businesses to GSTP and a larger requirement for school spaces. SGS is unsure if a 'Knowledge Park' can be supported here as most technology requirements can be accommodated at GSTP, now and for approx. the next decade. Commercial development at Sharpness New Settlement could be focused on small trade counter uses instead or considered a long term, 10-20 year development, when GSTP is full and local companies need grow-on space. In the more immediate future the 'Eco Park' proposal by Ecotricity at Junction 13, M5 is viewed as a viable source of expansion space for GSTP companies. SGS are therefore in support of this proposed development.

Employment Sites – Developer/Owner Aspirations

- 5.16 BE Group has contacted the owners/developers of each employment site being reviewed here, or their agents. The detailed responses provided are incorporated into the sites assessment undertaken in Section 7.0. The aspirations for future growth are summarised in Table 29.

Table 29 – Developer Aspirations

| Site | Aspirations for Future Use/ Development |
|------------------------------------|--|
| 2015 Local Plan Allocations | |
| SA2: West of Stonehouse | Outline consent for mixed-use development including 9.30 ha of employment land, with overall Outline consent for 35,000 sqm of E/B-Class space. Five development plots identified. Plot E4 to be developed first, 2.42 ha, with two buildings proposed of 1,858 sqm and 4,645 sqm as design and build options. Plot being marketed with various interested parties. Hoping to develop in 2020/21 Plot E5 to be marketed/developed after, 2-3 units of 2,787 sqm each. Plots E1-3 would follow in 2022+. |
| SA3: North East Cam | Two commercial plots within a wider housing scheme. Plot E1 to go to market for a developer in early 2021 and E2 in 2-3 year window. Plot E2 is currently inaccessible, so two other plots to be sold off to a housebuilder to deliver the access across the River Cam. |
| SA4a: Quedgeley East | Development consented and underway, 8.50 of undeveloped land remains. Delivery timetable for outstanding consented floorspace: |

| | |
|---|--|
| | <ul style="list-style-type: none"> • 2021 – four units of 16,700 sqm • 2022 – one unit of 10,777 sqm and one of 5,574 sqm • 2023/4 – Redevelopment of Trading Estate for 28,000 sqm of new space. |
| SA5: Sharpness Docks | Seeking planning consent for 12,000 sqm of industrial floorspace and 7,000 sqm of E(g)/ light industrial as part of larger mixed-use development. No firm plans for delivery if consent is secured. |
| SA5a: South of Severn Distribution Park | Consented for 46,400 sqm of primarily B8 space. Site cleared and construction expected to commence shortly to meet the needs of specific companies. |
| 2019 Draft Local Plan, Proposed Strategic Employment Sites | |
| PS19a: North West of Stonehouse | Land to be collectively developed alongside West of Stonehouse (Great Oldbury) as the site is currently landlocked. No agreements on the scale and nature of proposed employment development here and how costs and values might be apportioned across the wider scheme. Access from south via West of Stonehouse PlotsE4-5 available but not secured. |
| PS20: M5 Junction 13 | Northern site has received outline planning consent for a football stadium and employment land is now proposed on car-parking land on the northern site and part of the southern site as an 'Eco Park', with owner Ecotricity as anchor tenant. |
| PS32: Quedgeley East Extension | Owner wants to promote the site itself and secure planning with the bulk of site developed for larger B2/ B8 units as per Quedgeley East to the west. Would also like to see a scheme for local firms/ start-ups. St Modwen have an option and would be interested in developing post 2024. |
| PS36: New Settlement at Sharpness | Employment land of 10.00 ha proposed within mixed-use development including 4,000-5,000 new homes. Employment land is proposed for a knowledge based business park close to a new Sharpness Rail Station, but proposal has not been marketed yet to developers/occupiers. |
| PS37: New settlement at Wisloe | Employment land of 5.00 ha within mixed-use development including 1,500 new homes. Employment space will be for local business start-ups and growth, to be delivered in small plots rather than one large site. |
| PS43: Javelin Park | Proposed Symmetry Park is being promoted on land within draft allocation and adjacent to it east/west of Gloucester Road. Could be a total of 186,000 sqm of B2/B8. |
| PS47: Renishaw New Mills | Manufacturing facilities for another enterprise of Renishaw's owner, which will take up 50-60 percent of the site. Remainder of site to be a small business park for similar businesses. |
| Other Sites | |
| Actrees Farm | Seeking to secure both existing site and growth land as an allocated employment area for continued use accommodating rural E/B-Class businesses. |
| CM Downton Ltd | Looking to build either: <ul style="list-style-type: none"> • 28,000 sqm B8 unit • Redevelopment of site to deliver 41,500 sqm of floorspace. |
| Land adjoining Aston Down Business Park | Proposal here is led by a requirement from a Stroud-based logistics business, whose owner lives close to Aston Down and wishes to move the business here. This business also intends to consolidate operations from other parts of England here. This will take up a third to half the site. Land to meet other requirements, as needed. |
| Land east of Gloucester Road | Part of proposed Symmetry Park, this site would contain 82,000 sqm of B2/B8 in three units of 6,689-24,387 sqm. |
| Land west of Gloucester Road | Part of proposed Symmetry Park, this site would contain 104,000 sqm of B2/B8. |

| | |
|------------------------------|--|
| Land north of Grove End Farm | Employment land for up to 52,000 sqm within mixed-use development including 2,250 dwellings. |
|------------------------------|--|

Source: BE Group consultations with multiple parties, 2020

Local Businesses

- 5.17 Consultations with major local employers have focused on those linked to key employment sites. However, most of the major employers of the District have at least some plans for growth over the next five years. The Covid-19 pandemic and lockdown may have held up growth in 2020 but, at present at least, local businesses are expecting to resume expansion in 2021. Employers are seeking growth to meet their own needs in the form of expansions to manufacturing facilities and refurbishments/consolidation of offices. However, two major local firms are also seeking to develop more elaborate business park/industrial estate facilities, which will function, at least in part, as supplier parks for the anchor business. These will draw in both local suppliers, and customers, but also bring in investors from further afield as well as consolidating some main business operations or allowing new business divisions to be launched.
- 5.18 Businesses expressed confidence in Stroud District, its accessibility and range of services. Most draw all their labour from the Stroud District/Gloucester which is identified as having a skilled and active workforce. The only skills shortage identified was for trained ICT staff, with one company having to open a satellite office in Bristol to address this. No major issues with access were noted, only locally specific concerns with individual roads and junctions in Stroud town. Only one business expressed an issue with finding suitable land for their company's expansion, mainly due to the intended use being for vehicular storage and looking for land to buy, not rent.

Summary

- 5.19 GFirst identifies that Stroud District has strengths in Advanced Manufacturing and Renewables, key sectors for the county. GSTP at Berkeley is a key facility in this regard, particularly for start-ups/micro businesses. Conversely, a lot of needs from the ICT sector generally and Cyber Security specifically will be met at the Golden Valley development in West Cheltenham, where GCHQ is the anchor. Other growth sectors, key for the South West more generally, are likely to include logistics, production of medical products, food and drink and financial services.

- 5.20 While recognising some potential B2/B8 at the Sharpness New Settlement, GFirst were sceptical about the Knowledge Based business park proposed here for the employment element. It highlighted that such a scheme would require a specialist developer willing to also accept long term management responsibilities; a high grade of premises which could be hard to deliver viably and ideally an anchor tenant who could draw in other businesses to this rural location.
- 5.21 GSTP has grown to become a key centre for technology-based start-ups/micro firms due to its availability of affordable premises and links to a number of educational facilities. The lack of modern premises and local restrictions on HGV movements limit its attractiveness to larger companies, particularly B2/B8 businesses. With 16 ha already in use, the GSTP intends to expand into the decommissioned nuclear site, another 16 ha, over the next decade. This growth will meet a lot of local needs and grow-on space could be met at the Ecotricity Eco Park scheme at Junction 13, M5 in the short term and possibly Sharpness New Settlement in the longer term.
- 5.22 Discussions with developers, landowners and businesses indicate that plans for growth are emerging on all the existing/proposed employment sites of Stroud District. Proposals are most advanced around Quedgeley/Junction 12, M5 and Stonehouse where masterplanning, marketing and in one case, development, is underway. Proposals are vaguer on the New Settlements, where there are only initial ideas about what form the employment elements could take, with no commitments yet made by owners/developers on how sites could be brought forward for E/B-Class uses.
- 5.23 Most of the major employers of the District have at least some plans for growth over the next five years. The Covid-19 pandemic and lockdown may have held up growth in 2020 but, it is expected to resume in 2021. In addition to office refurbishments and factory expansions, two major local firms are also seeking to develop more elaborate business park/industrial estate facilities, which will function, at least in part, as supplier parks for the anchor business. These are intended to draw in inward investment to the District. The only skills shortage identified was for trained ICT staff. No major issues with access were noted.

6.0 EMPLOYMENT AREAS ASSESSMENT

Introduction

- 6.1 BE Group has carried out a review of 46 Employment Areas across Stroud District.
- 6.2 Each area has been appraised and assessed through a combination of site visits, local intelligence, consultations with landowners and the views of those involved in the local property market. Proformas have been completed for each area and are accompanied by site plans. These are included in Appendix 4. Some key points to note about the proformas are:
- Area boundaries are based on Geographic Information Systems (GIS) plans provided by the District Council. Area sizes are also calculated from GIS
 - In 'Area Reference' the local authority's planning policy descriptor is provided for the Employment Areas already designated in the Local Plan
 - The 'Name' contains the local authority's designated title for the area, including where necessary the main street and town
 - A brief 'Description' is provided in the form of the consultancy team's comment on the area
 - In a multi-occupier scheme, 'Occupier(s)' lists the major occupiers only
 - 'Prominence' assesses the visibility of each area from adjacent main roads. Areas can have high, moderate or low prominence
 - 'Current Use (Use Classes)' identifies whether buildings in the area are in office/light industrial (E(g)); general industrial (B2) and/or warehouse (B8) uses. In some cases areas may also contain an element of retail (A1), food retail (A3-A5), non-residential institutions (D1) or motor retail (Sui Generis)
 - An indication is provided of the age of properties in each of five categories assessed in 'Buildings Age'. These are pre-1945; Post 1945; Post 1960; Modern (i.e. post 1990) and New
 - 'Buildings Quality' is also broken down into three category assessments. 'Low' represents low quality design, externals, and condition. 'Good' equates to modern design, building condition, parking and external area provision. The remaining category is 'Moderate', covering properties that do not fit the other two headings

- In access constraints, any physical barriers to vehicle access (particularly HGV access) are discussed
- The distance from the area to the strategic road network (including the M5), the nearest rail station (in some cases the nearest station is Gloucester), nearest bus route and nearest services (local shops, hotels and cafes/pubs/restaurants) is measured
- The quality of car parking within the area is measured. To get a 'good' rating each individual property must have its own off-street parking
- 'Constraints' can be physical, environmental or planning based and will lower the quality of the area and/or limit existing or proposed business operation
- 'Scoring' is an overall score given to each site whereby the higher the score, the better the site is for employment uses. A full description of scoring has been given in paragraph 6.3 below.
- Vacant land is identified, as is the scope for remodelling of particular properties or sites. Expansion possibilities are also included. All of these are identified, for simplicity, as 'Opportunities for redevelopment/expansion'
- Finally, recommendations for the future role of the area are set out.

6.3 Each of the Employment Areas have been given a score, with a maximum to be achieved of 100. The higher the score the better the site location, access, growth prospects and site conditions. Appendix 5 shows a breakdown of the scoring system and the 10 categories in which each Area is judged on. Appendix 6 shows the scoring of each area.

6.4 The template for the employment area's proforma is shown as Table 30 below.

Table 30 – Employment Area Proforma Template

| | |
|----------------|--|
| Map | |
| Area Reference | |
| Name | |
| Description | |
| Occupier(s) | |
| Prominence | |

| | |
|--|--|
| Current Use (Use Classes) | |
| Size, ha | |
| Building Age | |
| Building Quality | |
| Access Constraints | |
| Distance to M5 Motorway, km | |
| Distance to A-road, km | |
| Distance to Rail Station, km | |
| Distance to Existing Bus Route, km | |
| Distance to Services, km | |
| Car Parking | |
| Constraints | |
| Scoring | |
| Opportunities for redevelopment/ expansion | |
| Other Information | |
| Recommendations | |

Source: BE Group, 2020

Employment Areas Analysis

- 6.5 Table 31 provides the assessment of the 46 Employment Areas in Stroud District. Together they comprise 345.04 ha of land mostly in active E/B-Class use.
- 6.6 This analysis updates research completed by BE Group for the 2013 Stroud District Employment Land Study. That Study reviewed 44 Employment Areas, totalling 362.12 ha, against 46 today. The increased number of areas in 2020 reflects the fact that the regeneration opportunity areas of Brimscombe and Thrupp have been sub-divided into a broader number of individual areas than was the case in 2013. Additionally the Former Berkshire Gravure Area, Brookside, Wotton-under-Edge is now lost to other uses while Sharpness Docks is now considered as a Strategic Employment Site, in Section 7.0 of this report rather than as an Employment Area, as was the case in 2013.
- 6.7 Apart from these alterations Stroud District's Employment Areas have not altered significantly in the last seven years. New development has focused around Quedgeley/Junction 12, M5 where St Modwen has been steadily delivering larger B2/B8 units in the three former MOD sites since 2004 and will continue development/redevelopment in the existing employment areas until at least 2024.

Table 31 – Summary of Existing Employment Areas

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|---|----------|---------|--|--|
| EI1, Site EK1: Rigestate, Station Road, Berkeley | Small industrial estate in an isolated rural location. (E(g), B2, B8) | 0.96 | 50 | Small, dense industrial estate, bounded by railway line to the north. Small scale infill has occurred/ has consent in north of site. Little further infill land remains without removal of trees which screen the Area from the road. | Retain as local employment area for E/B2/B8 uses |
| EI1, Site EK3: Griffin Mills Industrial Estate North, London Road, Thrupp | Moderate quality industrial estate, comprising several sub-divided mill properties which house office, industrial, craft and retail firms. Also accommodation for a large occupier. (E(g)/B2/B8) | 3.50 | 56 | Although there may be further opportunities to refurbish and remodel the mills, these buildings presently provide a useful function accommodating new/micro workshop, office and craft/retail businesses. More significant redevelopment would require major alteration to listed buildings. At present, there is no evidence of any demand for such a project | Retain as a local employment area for E/B2/B8 as a source of small business space |
| EI1, Site EK4: Hope Mills Industrial Estate, London Road, Thrupp | Established, moderate quality industrial estate, partly in a backland location. (E(g) (iii)/B2/B8) | 2.08 | 47 | Most land and property in full use. Regeneration area to the south, around Ham Mills, considered separately Expansion of the estate elsewhere is constrained by surrounding uses. | Retain as local employment area for E/B2/B8 uses. |
| EMI1, Site EK5: Griffin Mills Industrial Estate South (Phoenix Industrial Estate), London Road, Thrupp | Estate of moderate quality terraced industrial units, with some modern/ refurbished accommodation in the south. (E(g) (iii)/B2/B8) | 5.18 | 70 | Most land in full use with expansion constrained by surrounding uses. Regeneration in the north (Ham Mills) considered separately. | Retain as local employment area for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|---|---|
| E11, Site EK6: Draycott/Middle Mill Industrial Area, High Street, Cam/Dursley | Modern industrial estate, with accommodation for several large employers and expansion land in the south and east. (E(g) (iii), B2, B8, Sui Generis) | 21.94 | 62 | In principle, 1.81 ha of undeveloped expansion land remains between main estate and Eco Board/ Sundeala facility in south, however it is assumed this land is undevelopable as it is bisected by the River Cam and in an area of high Flood Risk. Apart from minor infill options, all other land is in use. Strategic growth options for Cam/ Dursley are considered separately in Section 7.0, including options to develop land to the immediate east of the River Cam. | Retain as key local employment area for E/B2/B8 uses |
| E11, Site EK7: Cam Mills, Everlands, Cam/Dursley | Mill complex, plus modern extensions, occupied by a large local employer (WSP Textiles). (B2) | 2.25 | 44 | Some undeveloped land in the east of the site (presently used for landscaping) which could permit the expansion of WSP, if required. All other land in use. Further expansion of the area is prevented by surrounding housing and recreation land. | Retain as site for key local employer. |
| E11, Site EK8: Chalford Industrial Estate, Chalford | Established, moderate quality industrial estate comprising a range of older stone built properties, a subdivided mill and areas of open storage, bounded by the River Frome and Thames/Severn Canal (E(g) (iii), B2, B8) | 3.62 | 51 | Most land and property appears to be in use, along with the open storage space. While the refurbishment of some properties may be possible, options for redevelopment will be constrained by the historic nature of many of the buildings (protected though Conservation Area, and possibly, Listed Building status). | Retain as local employment area for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|--|----------|---------|---|--|
| | | | | Opportunities for expansion are limited by adjacent waterways and the fact that the Industrial Estate sits in a narrow valley bottom. | |
| E11, Site EK9: Littlecombe Business Park, Dursley | Modern industrial estate of light industrial units in a mostly new build residential area within Dursley (E(g) (iii), B2, B8) | 3.78 | 69 | Two phases of units have been delivered to date. St Modwen has developed all land under its ownership whilst 0.75 ha remains undeveloped in the south, under Stroud District Council ownership. | Retain as local employment area for B2/B8 uses. Council should engage with St Modwen regarding further development on remaining land. Employment allocation includes Vale Community Hospital of 1.43 ha which should be excluded. |
| E11, Site EK10: Meadow Mill Industrial Estate (Eastington Trading Estate), Eastington | Small rural industrial estate, comprising a mix of mostly budget quality industrial premises, fronted by greenfield expansion land. (E(g) (iii), B2, B8) | 4.10 | 45 | 2.20 ha of undeveloped land fronting the estate – previously identified in the now superseded Local Plan as Site EA2: ' <i>Meadow Mill, Eastington</i> '. Available to meet future needs, although its development would represent a sizeable expansion of this industrial estate and its take up appears unlikely at this time. The ARC Energy building provides future opportunities for refurbishment should it no longer meet the needs of the occupier. Elsewhere land and property appears in reasonable condition and well occupied. Further growth (beyond Site EA2) is | Retain as local employment area for E/B2/B8 uses. Should ARC vacate, the premises is of sufficient quality to attract new occupiers, albeit likely micro and small employers seeking budget space rather than another large business. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|--|----------|---------|--|---|
| | | | | constrained by surrounding areas of ecological value. | |
| E11, Site EK11: Frampton Industrial Estate, Bridge Road, Frampton-on-Severn | Budget quality, canal side industrial estate in an edge of settlement location. (E(g), B2, B8) | 2.89 | 38 | Tightly defined, dense industrial area presenting no opportunities for significant change. Further expansion is prevented by the surrounding canal and housing. | Retain as local employment area for E/B2/B8 uses Consent has been granted for housing in the north east and assuming this is developed, 0.60 ha should be excluded from any future Employment Area allocation. Conversely a parcel of land in the south east used for HGV parking of 0.22 ha could be included. |
| E11, Site EK12: Former MoD Site 4 (Quedgeley West Business Park), Quedgeley | High quality, modern logistics park on a main road location, close to Junction 12, M5. (B2, B8) | 12.70 | 74 | Area is fully developed. Strategic growth options in the wider area are considered separately in Section 7.0. | Retain as sub-regional employment area for B2/B8 uses. |
| E11, Site EK13: Former MoD Site 2, Hardwicke Hunts Grove/ Quadrant Distribution Centre (Gateway 12), Quedgeley | Modern, low density business park, including substantial greenfield development land. Area has seen development over 2015-19 by developer St Modwen of six modern units of 2,500-6,700 sqm (E(g) (iii), B2, B8) | 23.09 | 80 | 8.32 ha remains undeveloped. However, the land is now subject to an outline application for 160 dwellings. Emphasis for new development has now moved south to sites which more directly access Junction 12. Strategic site proposals are discussed in Section 7.0. | Retain as sub-regional employment area for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|---|-------------------------------------|---------|--|---|
| E11, Site EK14: Javelin Park, Haresfield | Site of the Gloucestershire Energy from Waste Centre, plus associated infrastructure, adjacent to garden centre, off Junction 12, M5 (B2, B8) | 11.23 | 70 | Main facility operational. 6.25 ha of undeveloped land north of the Centre is separately owned. Planning has been submitted for four buildings of E(g) (iii)B2/B8 use class on this site. This development will trigger requirements for large scale investment into Junction 12, M5. Range of strategic proposals in surrounding area are discussed in Section 7.0. | Protect as site for key sub-regional facility and future employment development site. |
| E11, Site EK15: Former MoD Site 6 Haresfield Quedgeley Trading Estate East, Quedgeley | Low quality former MoD complex, now surrounded St Modwen Park, a new-build industrial/ warehouse scheme (with three units completed to date), close to Junction 12, M5 (E(g) (iii), B2, B8) | 9.63 (22.63 with St Modwen Park) | 82 | St Modwen secured consent for 86,000 sqm of B2/B8 floorspace, including redevelopment of existing Trading Estate. 3 units were delivered in 2019, of which one is let and another under offer. Future plans include: <ul style="list-style-type: none"> • 2021 – 4 units to be delivered totalling 16,700 sqm • 2022 – 2 units to be delivered of 16,351 sqm • 2023-24 – Redevelopment of trade park for 28,000 sqm of new space. | Retain as key sub-regional/regional employment area for B2/B8 uses. |
| E11, Site EK16: Hinton Severn Distribution Park, Sharpness | Secure distribution park south of Sharpness Docks (B2, B8) | 16.35 (present developed area) | 55 | An expansion site of 9.8 ha is proposed in the emerging Local Plan on land to the south, owned by Howard Tenens. This would meet the needs of new and growing businesses who wish to operate from the Distribution Park. | Retain as a sub-regional warehousing and distribution centre. Support the growth of the Park as required. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|---|---|
| EMI1, Site EK17: Renishaw, New Mills, Kingswood | Substantial, modern headquarters office/manufacturing facility for a major employer. (E(g) (i) B2) | 8.91 | 59 | 9 ha expansion site on west side of existing area, which is being progressed. Renishaw have identified need for new manufacturing facilities and to accommodate other businesses here. Renishaw are also seeking consent for a 33,131 sqm new research facility and car-parking on 3.8 ha of greenfield land to the North West. | Retain as site for key local employer. Current boundary excludes Renishaw facilities in the south and would exclude them in the North West if proposals are consented so boundary should be re-drawn to reflect this. |
| E11, EK18: Renishaw Charfield Works, Kingswood | Solus, modern factory for Renishaw in an edge of settlement location (E(g) (i), B2, B8) | 1.42 | 50 | 0.66 ha of undeveloped expansion land in the east, under Renishaw's ownership. However, the linear shape of the land would limit what could be developed, and any development would be for the exclusive use of Renishaw. Further expansion in the east would require loss of farmland and the expansion of Charfield settlement into the countryside. Expansion in the west is prevented by the Little Avon River and woodland. | Protect as site for key local employer. |
| E11, Site EK19: Abbey Mill Industrial Estate, Charfield Road, Kingswood | Small, moderate quality, edge of settlement industrial estate. (E(g) (iii), B2, B8) | 2.33 | 50 | Open land is in use for open storage and HGV parking. Further expansion of the industrial estate would not be possible without the loss of some greenfield agricultural land. Would also require development outside of the present Kingswood settlement boundary. | Retain as local employment area for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|--|--|
| E11, EK20: Kingswood Orchestra Works | Small, edge of settlement industrial site, accessed via narrow residential roads. Occupier is DCL Print although it is unclear if it is actively trading from this location at present. (E(g) (iii), B2, B8) | 0.73 | 30 | Area is fully developed, further expansion not possible without loss of some greenfield agricultural land. Would also require development outside of the present Kingswood settlement boundary. | Assuming the site is still occupied by businesses then Protect in the Local Plan. If this is not the case, then due to limited local value and constrained access, site could be considered for other uses. |
| E11, Site EK21: Aston Down, Minchinhampton | Former airfield properties, converted to provide budget quality employment premises in the Cotswold Area of Outstanding Natural Beauty (AONB) area (E(g), B2, B8) | 22.04 | 70 | The estate is of a low density and offers several infill opportunity sites. The owner Leda Properties has now submitted a hybrid planning application develop most of these plots. Overall, 13,231 sqm proposed on 5.15 ha (3.38 ha within Stroud District, the rest in Cotswold District). There is another 3.50 ha of undeveloped land south of the main hangers, within the allocated Area. The Area owner is also proposing land to the north of the existing allocation, outside of the secure Employment Area for E/B-Class uses (See Employment Site: Land Adjoining Aston Down) | Retain as an Employment Area for E/B2/B8 uses in the development plan The Area owner has significant aspirations for further growth and investment. Based on past planning decisions it is not clear if any growth is permitted here, however the current planning application would intensify use in the existing Area, without encroaching on the surrounding Countryside. This would have lower impacts than external expansion of the Area. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|---|---|
| E11, Site EK22: Inchbrook Industrial Estate, Bath Road, Nailsworth | Substantial, linear employment area comprising modern facilities for a major local employer, sub-divided mill complexes and several budget quality metal-framed units. Units in north are in trade use. (E(g) (iii), B2, B8) | 8.64 | 60 | Dense employment area, all land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Some of the mill properties may provide future opportunities for refurbishment. | Retain as key local employment area for E/B2/B8 uses and as site for major local employer and trade uses in smaller, budget accommodation to the north. |
| E11, Site EK23: Nailsworth Mill Industrial Estate, Avening Road, Nailsworth | Good quality, established industrial estate, comprising stone built units in a valley bottom location. (E(g), B2, B8) | 3.31 | 59 | Dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. | Retain as local employment area for E/B2/B8 uses |
| E11, Site EK24: Spring Mill Industrial Estate, Avening Road, Nailsworth | Good quality, established industrial estate, comprising stone built units in a valley bottom location. Includes a recent mill refurbishment (Holcombe Mill). (E(g), B2, B8) | 2.37 | 55 | Small, dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Refurbishment of the existing mill properties has already taken place/ is taking place. | Retain as local employment area for E/B2/B8 uses |
| E11, Site EK25: Bath Road Industrial Estate, Rodborough, Stroud | Substantial employment area, including a listed mill complex, terraced industrial units and accommodation for a major occupier. An Aldi foodstore has been developed on the main road frontage (E(g), B2, B8) | 6.40 | 70 | Development of Aldi has taken up the main redevelopment opportunity here. Other land and property appears well used. Surrounding uses prevent further expansion | Retain the bulk of the land as a local employment area for E/B2/B8 uses. Exclude Aldi foodstore, 0.90 ha, to protect other premises for employment use. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|---|----------|---------|---|---|
| E11, Site EK26: Stroudwater/ Oldends Lane Industrial Area (Stroudwater Industrial Estate), Stonehouse | Good quality greenfield business park, on a main road location close to Junction 13, M5 (E(g), B2, B8) | 60.53 | 89 | Expansion land for ABB of 1.25 ha and Delphi Technologies of 0.66 ha is likely to be held exclusively for those businesses. Other land is in use, including facilities for Travelling Showpeople. Outside of the estate there are strategic development proposals associated with Great Oldbury, considered in Section 7.0. | Retain as sub- regional employment area for E/B8 and associated services. |
| E11, Site EK27: Stonehouse Park, Stonehouse (Bonds Mill) | High Quality, modern office park combined with greenfield expansion land, at a canal side location (E(g) (i)) | 5.04 | 82 | 0.53 ha remains undeveloped in the north west – marketed as Phase 4 of Stonehouse Office Park with 1,198 sqm of new offices to buy/ let. The main frontage site is owned by Sartorius and partially developed for an industrial unit for that business, with 0.63 ha of further expansion land in the south, under the same ownership. Land in the south east is under construction as a Costa Coffee shop and drive thru | Retain as local employment area for mostly E(g) (i) uses. Future proposals of more good quality office space should be encouraged. |
| E11, Site EK28: Bonds Mill Industrial Estate, Bristol Road, Stonehouse | Sub-divided, dense former mill complex providing a range of good quality workspace on a canal side location. Also includes several larger industrial units close to the A419 Bristol Road frontage. (E, B2, B8) | 3.32 | 69 | Most land and property appears to be in use, while refurbishment of much of the older mill premises has already taken place. In the south, Frome House is identified for redevelopment for 520 sqm of offices | Retain as local employment area for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|---|--|
| E11, Site EK29: Upper Mills Industrial Estate, Bristol Road, Stonehouse | Small, linear industrial estate in an edge of settlement location. (E(g) (iii), B2, B8/ Sui Generis) | 2.47 | 62 | Dense industrial estate with all land and premises in use. The units are modern, providing no opportunities for refurbishment. Further growth of the area is prevented by surrounding uses, including land of ecological value to the south. | Retain as local employment area for B2/B8 uses. |
| E11, Site EK30: Ryeford Industrial Area, Stonehouse | Budget quality industrial estate, accessed by unsurfaced roads and dominated by trade uses. (E(g) (iii), B2, B8) | 5.70 | 68 | Dense industrial estate with all land and premises in use north of the bypass land and one infill plot remains in the south – however developability may be limited by constrained access. Estate has extended east, North of the A419, in practice adding 1.10 ha of land to the Employment Area including one developed unit of 0.30 ha. Further growth of the area is prevented by surrounding uses, including land of ecological value. | Retain as local employment area for E/B2/B8 uses/ trade uses. Some expansion appears to have occurred in the north east, towards Stroud Cricket Club, and the Council should consider expanding the allocation here to reflect this, a further 1.10 ha of employment land including 0.80 ha of development land. Any future proposals for regeneration should look to improve access and circulation roads. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|---|--|
| E11, Site EK31: Fromside Industrial Estate, Dr Newton's Way, Stroud | Small estate of moderate quality terraced industrial units, centrally located in Stroud town. (E(g) (iii), B2, B8) | 1.36 | 69 | Successful industrial estate with all land and premises in use. Further growth of the area is prevented by surrounding uses, including canal to the north. | Retain as local employment area for E/B2/B8 uses. |
| E11, Site EK32: Salmon Springs Industrial Estate, Painswick Road, Stroud | Edge of settlement industrial estate comprising several mill properties on a main road location. (E, B2, B8) | 2.07 | 63 | The historic mill properties may provide some opportunities for further refurbishment and sub-division of units. Further expansion of the area would not be possible without the loss of greenfield land (within the Cotswold AONB). | Retain as local employment area for E/B2/B8 uses. |
| E11, Site EK33: New Mills/Libby Drive Site, Stroud | Small, budget quality industrial and mill complex, to the rear of housing. (E(g) (iii), B2, B8) | 1.58 | 60 | Small scale infill developments consented. Further expansion is prevented by adjacent uses and topography of the surrounding valley | Retain as local employment area for E/B2/B8 uses |
| E11, Site EK34: South Woodchester Industrial Area, Bath Road, Woodchester | Substantial modern industrial complex, with older buildings to the rear, on a main road, edge of settlement location. (E(g) (iii), B2, B8) | 3.18 | 51 | There are areas of cleared brownfield land within the curtilage of the facility, mostly fronting Bath Road, which could allow its expansion. Further expansion of the area would not be possible without encroaching into surrounding greenfield land (which includes areas of nature conservation value and land within the Cotswold AONB). | Retain as local employment area for E/B2/B8 uses. |
| E11, Site EK35: Frogmarsh Mill Industrial Estate, Bath Road, Woodchester | Small, sub-divided mill complex with modern extensions to the rear (E/B2) | 1.14 | 50 | The primary occupier (Bottle Green) has gradually expanded its operation over the past 10 years, taking up most of the available land and buildings (land fronting the A46 is wooded, sloping and inaccessible. | Retain as site for key local employer for E/B2/B8 uses. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|--|----------|---------|---|---|
| | | | | Further expansion of the area is constrained by surrounding uses. | |
| E11, Site EK36: Tabernacle Road, Wotton-under-Edge | Small backland industrial estate, dominated by motor trade occupiers. (E(g) (iii), Sui Generis) | 0.52 | 51 | No refurbishment, redevelopment or expansion opportunities. | Retain as local employment area for E/B2/B8 uses |
| E11, Site EK37: Renishaw, Old Town, Wotton-under-Edge | Single site facility for a major employer, centrally located in Wotton village. E(g) (i), B2 | 0.57 | 44 | Further expansion is constrained by surrounding uses. | Retain as site for key local employer. |
| E12, Site ER1: Brimscombe Port Industrial Area, London Road, Thrupp | Historic mill complex, sub-divided to provide small office and workshop accommodation. (E(g) (iii), B2, B8) | 4.20 | 73 | The site is allocated in the Local Plan for partial redevelopment for new homes, canal related tourism development and employment uses. The Council is actively pursuing a mixed use regeneration scheme for the site which will involve restoration of a canal basin and redevelopment of the site. Proposals are being progressed through the planning system and a development partner will be selected shortly. | Continue to pursue the existing mixed-use scheme, amending if necessary to reflect changing market conditions. Protect as a regeneration opportunity in the Local Plan. |
| E12, Site ER2: Brimscombe Mills, Brimscombe and Thrupp | Established, low quality industrial estate, in a backland location, including a large vacant mill building (E(g) (iii), B2, B8) | 3.11 | 64 | Application submitted in December 2019 for Brimscombe Mill (0.48 ha) for reuse of the 1,850 sqm Mill into a wellness Centre, café, storage and trade, offices and brewery/ distillery. This application remains undecided. | Reuse plans on main building are for primarily E/B-Class uses, thus the area remains a relevant regeneration area. Protect as a regeneration opportunity in the Local Plan. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|---|--|----------|---------|--|--|
| EI2, Site ER3: Ham Mills, Griffin Mills Industrial Estate, London Road, Thrupp | Vacant older industrial complex, surrounded by woodland Previously E(g) (iii), B2, B8 | 2.02 | 57 | Full planning consent for restoration of the mill building, 100 new homes, 686 sqm of E(g) (i) floorspace and 286 sqm of flexible floorspace. Timeframe for delivery is unknown. | Remains a regeneration opportunity site at present. However, consented plans would, if delivered be primarily for housing, albeit with some B1(a) offices. The mixed-use nature of the Area would need to be recognised in the Local Plan. |
| EI2, Site ER4: Wimberley Mills and Dockyard Works, Minchinhampton | Budget quality industrial and mill complex, located north and south of the River Frome (E(g) (iii), B2, B8) | 6.46 | 45 | Land south of the River Frome and Canal is cleared with outline consent for 104 dwellings on 2.78 ha. Other land and premises appear in full-use and does not offer any short/medium term regeneration opportunities. | Land north of the canal appears likely to remain an active Employment Area. Retain as local employment area for E/B2/B8 uses. Land consented for housing should be excluded from any future employment designation. |
| EI2, Site ER5: Dudbridge Industrial Estate, Cainscross, Stroud | Partly cleared mill complex. Housing and retail development site | 4.90 | N/A | Whole site is now consented, partly in outline, partly full for a foodstore and 130 homes. Site clearance has commenced. | Lost – Regardless of what is ultimately delivered here, this is no longer an active Employment area or employment development land and |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|--|---|
| | | | | | should be removed from the Local Plan. |
| EI2, Site ER6: Coaley Junction Industrial Estate, Draycott, Cam/Dursley | Rural open storage yard (former rail yard), in an edge of settlement location off a main road. Site now being redeveloped for housing (B8) | 0.95 | N/A | Land has consent for 41 dwellings with development appearing to have commenced. | Lost - Now a housing development site and so designation should be removed from the Local Plan. |
| EI2, Site ER7: Daniels Industrial Estate, Bath Road, Rodborough, Stroud | Moderate quality industrial estate on a steeply sloping hillside location. Land at main road junction has been redeveloped for housing – Much of the rest of the area also has consent for housing (E(g) (iii), B2, B8) | 3.34 | N/A | Although large parts remain operational, there is outline consent for 50 dwellings, a new foodstore and other food and drink units across the majority of the site, with some flats developed in the south. | Lost – Whilst parts of the industrial estate remains operational, the Local Plan should recognise this is likely to be a housing/ retail site in the future and the designation removed from the Local Plan. |
| EI2, Site ER8: Stafford Mills Industrial Estate, London Road, Stroud | Small, budget quality industrial estate dominated by motor trade occupiers. (E(g) (iii), B2, B8/ Sui Generis) | 1.71 | 61 | Low quality units within the estate may provide small scale opportunities for refurbishment and redevelopment. However, most buildings are in occupation by budget occupiers who may struggle to find accommodation elsewhere. | Retain as local employment area for E/B2/B8 uses. Consider what refurbishment/ redevelopment opportunities may exist for appropriate |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--|---|----------|---------|--|---|
| | | | | Further expansion of the estate would require bridging of the River Frome to the west. | mixed-use development. |
| EI2, Site ER9: Lodgemore/ Fromehall Mills, Stroud | Linear, canal side industrial estate, including historic mill complexes, close to Stroud Town Centre. (E(g) (iii), B2, B8) | 6.53 | 69 | The area is part of a wider Central river / canal corridor area identified in the Draft Local Plan for partial redevelopment and re-use for housing, as well as continued canal and employment uses. Although individual mill properties may provide some opportunities for refurbishment, the area as a whole appears well occupied and most land/property is in use. There is an area of undeveloped canal side land, between the Chestnut Lane and Lodgemore Lane canal bridges. This could be used to deliver further employment premises. | Retain as local employment area for E/B2/B8 uses. Short/ medium term change is likely to be limited to the refurbishment and improvement of existing properties. |
| EI2a: Berkeley Power Station, Berkeley | A decommissioned nuclear power station along with office/lab accommodation which is now Gloucestershire Science and Technology Park (GSTP), in a rural location by the River Severn (E(g), B8) | 31.89 | 55 | Office, industrial and lab space within the former Power Station site are now established as the GSTP on 16 ha. The GSTP comprises school, college, and university buildings, along with businesses of science/ research nature. All businesses who locate on the site must be in sectors related to research into science and technology and be able to support education/skills activity. It is owned by South Gloucestershire and Stroud College. Demand is understood to be strong, the GSTP is well located between Bristol, | Protect as an employment area for E(g), B8 employment uses in the development plan. The allocation should cover the whole nuclear site on the anticipation that some or all of the nuclear facilities being decommissioned will be re-used as business space over the Local Plan period. |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|------|---------------------------|----------|---------|--|-----------------|
| | | | | <p>Gloucester and Cheltenham and ideal for technology companies who do not want to pay city prices. Once buildings are refurbished, they can be let quickly although funding requirements can slow down the letting process.</p> <p>Once decommissioning has finished on the rest of the site, some 16 ha more land, in 3-5 years, the College intends to develop it for more business space (offices/workshops) over a further 5-year timeframe. The intention would be to utilise existing buildings and then consider brownfield development. Greenfield expansion is not proposed at this time.</p> <p>In December 2020, the UK Atomic Energy Authority launched a process to find a home for STEP (Spherical Tokamak for Energy Production) – a programme to build a fusion prototype plant. The Western Gateway is proposing a joint Oldbury-Berkeley bid to locate the power plant and initial technical centre at these sites. If successful, the project will create thousands of highly skilled jobs here. The aim is for the design phase – an outline of the power plant, with a clear view on how each of the major systems is designed – to be</p> | |

| Area | Description (Use Classes) | Size, ha | Scoring | Opportunities for Redevelopment/expansion | Recommendations |
|--------------|---------------------------|---------------|---------|--|-----------------|
| | | | | completed by 2024. Completion of the construction of the prototype power plant is targeted for 2040. | |
| Total | | 345.04 | | | |

Source: BE Group, 2020

- 6.8 Moving forward, apart from Quedgeley, further growth is likely to be seen at the Former Berkeley Power Station where South Gloucestershire and Stroud College hopes to expand the GSTP into the former power station site itself once decommissioning is fully completed, with up to 16 ha of brownfield land brought back into use. At Site EK21: Aston Down, Minchinhampton consent is being sought for 13,231 sqm of additional E/B-Class development within the existing Area boundary, although it is not clear if such growth is permissible in the AONB. At Site ER1: Brimscombe Port Industrial Area, London Road, Thrupp, regeneration is proceeding under Council leadership with current proposals for around 1,000 sqm of commercial space in a housing-led scheme. At Site ER2: Brimscombe Mills, Brimscombe and Thrupp proposals would see the 1,850 sqm main Mill converted into a mixed-use facility, but still accommodating a number of E/B-Class uses.
- 6.9 Redevelopments here would be useful to meet the premises needs of micro businesses alongside the more strategic growth proposed in the main Employment Sites.
- 6.10 Conversely, three Employment Areas have consent for and/or are in the process of being redeveloped for housing and should be excluded from future Local Plan allocations, for employment uses:
- Site ER5: Dudbridge Industrial Estate, Cainscross, Stroud – No longer an active Employment Area (4.90 ha)
 - Site ER6: Coaley Junction Industrial Estate, Draycott, Cam/Dursley – Now a housing development site (0.95 ha)
 - Site ER7: Daniels Industrial Estate, Bath Road, Rodborough, Stroud – Likely to be a housing/ retail development site in the future (3.34 ha).
- 6.11 Site ER3: Ham Mills, Griffin Mills Industrial Estate, London Road, Thrupp (2.02 ha) is subject to consented plans which, if delivered, would be primarily for housing, albeit with some E(g) (i) offices. Additionally, some 2.78 ha in the south of Site ER4: Wimberley Mills and Dockyard Works, Minchinhampton is consented for housing, with the rest remaining in active employment use. The mixed use nature of both sites should be recognised in the Local Plan.

- 6.12 A number of other minor adjustments to Employment Areas, to reflect the expansion or contraction of E/B-Class areas, are also recommended as set out in Table 31.
- 6.13 Site scoring provides an assessment of each Area's accessibility, growth prospects, environmental settling, flexibility and critical mass of existing businesses, which will be a draw to new firms as businesses like to co-locate with others. Areas which score more than 70 out of 100, can be said to be performing excellently against all of these criteria. Ten Employment Areas score 70 or higher including most of the main industrial estates of Quedgeley and Stonehouse as well as Site EK21: Aston Down, Minchinhampton. Site ER1: Brimscombe Port Industrial Area, London Road, Thrupp also scores well by virtue of its location and prospects for future growth, albeit for a mix of uses.
- 6.14 Stroudwater Industrial Estate, Stonehouse, achieved the highest score of 89. The large employment area is in a strong location, along a major A-road, with good access to Junction 13 of the M5 and a range of services. The Area is home to a critical mass of the District's major employers, some of which have available expansion land in their facilities while there are further expansion sites being developed to the north.
- 6.15 Three other sites also achieved scores above 80 – Quadrant Distribution Centre (Gateway 12) – 80, Haresfield Quedgeley Trading Estate East – 82 and Stonehouse Park – 82. Again, these are modern Employment Areas on the strategic road network and close to M5 Junctions. All have seen recent development and have some prospects for further growth.
- 6.16 Areas scoring 50-69 represent the more moderate quality employment premises aimed at meeting local business needs. Often however, the scoring reflects their weaker access and smaller size, reducing critical mass, flexibility and prospects for growth rather than serious deficiencies in the ongoing viability of the Areas. 26 Areas achieved scores of 50-69 and all are active and well occupied by a diverse range of local businesses.
- 6.17 Seven Areas scored less than 50 and these locations are of greater concern in terms of the quality of premises, accessibility, location/impact of adjoining uses and critical mass/occupancy. The Council should monitor these locations for further evidence of decline and signs of dereliction. At present however, except for the locations lost to housing noted above, which are not scored, all continue to function as Employment

Areas, meeting business needs and particularly providing the budget accommodation which many micro businesses require.

6.18 Kingswood Orchestra Works scored the lowest out of all the Employment Areas with a score of 30. This site is located on the edge of Kingswood settlement with accessibility limited to narrow, residential roads and therefore no prominence. Situated in a poor quality estate, with few occupiers to attract more businesses, the site has several constraints and no critical mass. Additionally there are no growth prospects without development on greenfield land/ outside of Kingswood settlement boundary. This isolated site is unlikely to be attractive to modern businesses and a broader range of uses could be considered here, subject to Local Plan policies.

6.19 Employment Areas which may provide redevelopment and regeneration opportunities for employment uses to 2040, alongside the Employment Sites identified in Section 7.0, include:

- Meadow Mill Industrial Estate – 2.20 ha of land fronting the estate could provide growth options
- Quadrant Distribution Centre (Gateway 12) – 8.32 ha is undeveloped, however it is subject to an outline application for 160 dwellings
- Javelin Park – 6.25 ha of undeveloped land north of the Centre with a planning application submitted for four buildings of E(g) (iii), B2, B8 use
- Stonehouse Park – 0.53 ha remains undeveloped as Phase 4 of the office park. 0.63 ha of expansion land in the south under ownership of Sanctus
- Bonds Mill Industrial Estate, Bristol Road, Stonehouse – Frome House identified for redevelopment/refurbishment for 520 sqm of offices
- Brimscombe Mill – Reuse of the 1,850 sqm Mill on 0.48 ha
- Ham Mills – Development of 686 sqm of E(g) (i) floorspace and 286 sqm of flexible floorspace
- Berkeley Power Station – Once decommissioning has finished, 16 ha is intended to be developed for office/R&D/ workshop space for expansion of GSTP.

6.20 Additionally, Aston Down incorporates several expansion opportunities including five zones totalling 13,231 sqm and 3.50 ha of underdeveloped land to the south although growth here is constrained by the AONB status of the Area.

Rural Employment Schemes

6.21 In addition to the 46 Employment Areas identified in Local Plan Policy, there are a range of rural employment locations in the District. Four prominent examples are summarised in Table 32.

Table 32 – Example Rural Employment Schemes

| Area | Units | Vacancies/ Occupancy Levels | Types of Occupiers/Sector |
|---|---|---|---|
| Wayside Farm, Calf Way, The Camp, Stroud | Six B2/B8 buildings comprising 31 units of 40-120 sqm, including trade counter uses, storage and some retail. Site has consent for a further B8 building. | Fully occupied | <ul style="list-style-type: none"> Wholesale and retail trade, including 1stclassautorepairsLtd, MAV Tuning, Rossa Auto, Yorke Upholstery Professional, scientific and technical including Steer Energy Mixed manufacturing/engineering, including Guardsman Engineering Transportation and storage Other Services including, Sheen - Complete Floor and Fabric Care |
| Westend Courtyard, Westend Farm, Grove Lane | High spec serviced offices of 16-75 sqm. Four buildings sub divided into 47 different suites. | 5 units vacant of 26-28 sqm. Quoting rent is £30/sqft (£322/sqm) all inclusive Occupancy rate of 89 percent | <ul style="list-style-type: none"> Wholesale and retail trade, including Grand Jour Bridal Boutique, Gourmet Food Markets Construction, including Firmacore Professional, scientific and technical, including Design for Living UK, Research Publishing International, Advocate Legal Services Accommodation and food services, including H.S. Cake Design ICT, including Market Dojo Financial and insurance, including Vixus Property Advisory, James Bishop Accounting Services Health, including the Lightworks Clinic, Physability, Flourish Child Services, Moonstruck, Psychiatric Consultations Education, including Atlas Camps Other Services, including Fordham Hair Design |
| Actrees Farm, Heathfield, Alkington | E/B2/B8 12 self-contained buildings, offering 15 units of 160-200 sqm, on 1.2 ha All converted/ developed in last four years. | Fully occupied | <p>Almost all are start-ups.</p> <ul style="list-style-type: none"> Wholesale and retail trade, including AS Motors Arts, entertainment and recreation ICT, including Robocarv Agricultural, including Haven Animal Feeds |
| Taits Hill Industrial Estate, Stinchcombe | E/B2/B8 8 self-contained buildings, comprising 13 units of 25-101 sqm. | Fully occupied. | <ul style="list-style-type: none"> Accommodation and food services, including Gastronomy Ltd, Big Event Catering Ltd Wholesale and retail trade, including Autocheck Car Care Centre, Factory First Construction, including James Pitt Printing, including J & C Carter Printers ICT Health, including Check Full Life Fitness |

Source: Individual Scheme Websites, 2020

6.22 Of the four schemes shown, Westend Courtyard is the largest and highest specification facility, providing 47 offices to some high value companies in sectors such as finance,

health and ICT. This facility links to the wider Stonehouse Cluster, the focus for office market activity in Stroud District. Its scale, quality and focus on offices does not seem to be typical of rural schemes in Stroud.

- 6.23 Most rural schemes offer a mix of office and industrial/storage space and accommodate at least some firms in trade, retail and motor repair sectors. Overall, there are a diverse range of companies accommodated in these schemes. Most appear fully let, or at least are not openly marketing any space, suggesting good demand and a shortage of supply in rural areas. This is further evidenced by the fact that Actrees Farm has seen continuous growth since 2016.

Summary

- 6.24 Stroud District is home to 46 defined Employment Areas and/or regeneration opportunity areas. Since BE Group completed the 2013 Stroud District Employment Land Study the most significant changes have been at Quedgeley/Junction 12, M5 where St Modwen has been steadily delivering larger B2/B8 units in the three former MOD sites since 2004, and will continue development/redevelopment in the existing employment areas until at least 2024.
- 6.25 Moving forward, apart from Quedgeley, there are reasonable growth prospects at:
- Former Berkeley Power Station - Further expansion of GSTP into the former power station site
 - Site ER1: Brimscombe Port Industrial Area, London Road, Thrupp and Site ER2: Brimscombe Mills, Brimscombe and Thrupp – Mixed use regeneration proposals being progressed.
- 6.26 Conversely, three Employment Areas, Sites ER5-7, have consent for and are in the process of being redeveloped for housing and should be excluded from future Local Plan designations for employment uses. Two others, ER3-4 are likely to progress mixed use redevelopments, which involve the loss of sizable areas of land to housing.
- 6.27 All the Employment Areas are scored out of 100 and the ten sites which score 70 or more are of particular value to the District and should be strongly protected in the Local Plan. The 25 Areas scoring 50-69 represent the more moderate quality employment premises but which still meet local business needs.

- 6.28 Seven Areas scored less than 50 and are of greater concern in terms of their long term viability. The Council should monitor these locations for further evidence of decline and signs of dereliction. At present however, all continue to meet business needs and particularly provide the budget accommodation which many micro businesses require. There is no assumption that these locations should not be retained for E/B-Class uses in the next Local Plan.
- 6.29 Overall, eight Areas have at least some capacity to provide redevelopment and regeneration opportunities for multiple businesses to 2040, alongside the Employment Sites identified in Section 7.0.
- 6.30 The rural schemes examined here accommodate a diverse range of businesses, including local start-ups and retail/trade firms. Most appear fully let, or at least are not openly marketing any space, suggesting good demand and a shortage of supply in rural areas.

7.0 EMPLOYMENT SITES ASSESSMENT

Introduction

- 7.1 This section looks at the portfolio of employment land which will be available for the development of new E/B2/B8 premises to 2040, to meet the employment land needs, as identified in the ENA Study of 62.4-71.7 ha.
- 7.2 The District needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Baseline Land Supply

- 7.3 The maximum possible supply of new land, which includes existing allocations in the adopted 2015 Local Plan, proposed sites in the 2019 Draft Local Plan and further submissions made through the Strategic Assessment of Land Availability (SALA) and Local Plan process, is 157.39 ha (see Table 33). Proformas for each Site are provided in Appendix 7.

Table 33 – Baseline Land Supply

| Site | Size, ha | Source of Site Size Estimate |
|---|--------------|--|
| 2015 Local Plan Allocations | | |
| SA2: West of Stonehouse | 10.00 | 2015 Local Plan |
| SA3: North East Cam | 11.40 | 2015 Local Plan |
| SA4a: Quedgeley East | 13.00 | 2015 Local Plan |
| SA5: Sharpness Docks | 6.60 | New E(g)/B-Class development area for which Outline consent is being sought in App. No S.17/0798/OUT |
| SA5a: South of Severn Distribution Park | 9.80 | 2015 Local Plan |
| Sub-Total | 50.80 | - |
| 2019 Draft Local Plan, Proposed Strategic Employment Sites | | |
| PS19a: North West of Stonehouse | 5.00 | 2019 Draft Local Plan |
| PS20: M5 Junction 13 | 10.00 | 2019 Draft Local Plan |
| PS32: Quedgeley East Extension | 5.00 | 2019 Draft Local Plan |
| PS36: New Settlement at Sharpness | 10.00 | 2019 Draft Local Plan |
| PS37: New settlement at Wisloe | 5.00 | 2019 Draft Local Plan |
| PS43: Javelin Park | 9.00 | 2019 Draft Local Plan |
| PS47: Renishaw New Mills | 9.00 | 2019 Draft Local Plan |
| Sub-Total | 53.00 | - |
| Other Sites | | |
| Actrees Farm | 2.89 | As identified in Rep. NPT003 to the Stroud Local Plan Review, Emerging Strategy Consultation 2018 |
| CM Downton Ltd | 4.60 | New development land, as identified in the submission to the Council 'EvCargo Ltd Downton Development Plans Land at Bristol Rd, Moreton Valence, Gloucester GL2 7ND.' Page 5. Prepared by James Clark, CPLC 29/09/20 |
| Land adjoining Aston Down Business Park | 3.80 | As identified in the submission of Ridge Property and Construction Consultants, dated 22/01/20, Page 2. Rep |

| | | |
|------------------------------|---------------|---|
| | | 00103 to the 2019-2020 Draft Local Plan Review Consultation |
| Land west of Gloucester Road | 13.10 | Net developable area, as identified by the Tritax Symmetry 'Symmetry Park' Illustrative Masterplan of 08/04/20 (Drawing No. 6440-18). 22.10 ha, less the 9 ha of Javelin Park already included above. |
| Land east of Gloucester Road | 15.80 | Net developable area, as identified by the Tritax Symmetry 'Symmetry Park' Illustrative Masterplan of 08/04/20 (Drawing No. 6440-18) |
| Land north of Grove End Farm | 13.40 | As identified in the Grove End Farm, Whitminster Position Statement (Doc. No. P18-2639_2), Page 6. Rep 00493d to the 2019-2020 Draft Local Plan Review Consultation |
| Sub-Total | 53.59 | |
| Total | 157.39 | |

Source: SDC, 2020

7.4 The Stroud District 2020 Employment Land Availability Report also identifies a further 50.74 ha of existing commitments, sites with undeveloped planning consents for E(g)/B-Class uses, as of 31/03/2020. Combined with the above gives a maximum possible land supply of 208.13 ha.

7.5 208.13 ha clearly exceeds the identified needs, but that baseline supply includes areas of land which are developed/under development, sites of sub- 0.25 ha in size, overlap with other sites, not proposed for E/B-Class uses, not deliverable or in line with market demand or better suited to be identified as Employment Areas or sites likely to be lost to other uses. This Section provides an analysis to identify the realistic employment land supply for Stroud District, to 2040.

Commitments Analysis

7.6 Stroud District 2020 Employment Land Availability Report identifies 50.74 ha of relevant Commitments, listed in Table 34. However, analysis of the data identifies the following:

- 45.10 ha, in five sites, relate to land within allocated and proposed Employment Sites, also reviewed in this Study, or with other Commitments listed. To avoid double counting of supply, these are excluded
- 0.56 ha, in nine sites, comprises sites which are individually less than 0.25 ha in size. Paragraph: 009 (Reference ID: 3-009-20190722) in the Planning Practice Guidance Note 'Housing and Economic Land Availability Assessment', indicates that Employment Land Reviews should only consider sites of 0.25 ha or more in size.
- 2.27 ha, in three sites, comprises consented developments which would be for the sole use of the firms which secured the consents and could not realistically

be made available to meet the property needs of other businesses, i.e., small property extensions. The experience of BE Group in producing some 65 previous Employment Land Reviews since 2006 is that such discrete changes to owner occupied properties should not be considered part of the realistic local employment land supply.

- 7.7 Excluding the above, three Commitment Sites, totalling **2.81 ha** remain as part of Stroud District's realistic employment land supply.

Table 34 – E(g)/B – Class Commitments 2020 Analysis

| Parish | Site Address | Development Description | Planning application | Allocated site | Use class | Floor space m ² | Area (ha) | 0.25ha or above | sole use by applicant | Other Comments |
|---------------------|--|---|----------------------|----------------|-------------|----------------------------|--------------|-----------------|-----------------------|---|
| ALKINGTON | Land adjacent To Chapel Hill, Newport | Permission for 3 industrial units. | S.19/1914/REM | No | B8 | 449 | 0.46 | Yes | No | - |
| CAM | Land north east of Draycott Cam | A mixed use development comprising of up to 450 dwellings. | S.15/2804/OUT | Yes | B uses | - | 10.7 | - | - | Included seperately as Site SA3: North East Cam |
| COALEY | Lapley Farm Bungalow Coaley, | Change of use of three existing agricultural buildings to B1 | - | No | B1 | 415 | 0.09 | No | - | - |
| COALEY | Cambridge House Farm, Elmcote Lane, Cambridge | Demolition of the existing poultry sheds & erection of an office | S.14/1063/FUL | No | B1a | 659 | 0.95 | Yes | Yes | - |
| EASTINGTON | Land West of Stonehouse, | A mixed use development comprising up to 1 350 dwellings | S.14/0810/OUT | Yes | B1, B2, B8, | - | 9.3 | - | - | Included seperately as Site SA2: West of Stonehouse |
| FREThERNE WITH SAUL | Barns at Dunstalls Farm Arlingham Road Saul | Conversion of agricultural barns to business use. | - | No | B1 | 494 | 0.14 | No | - | - |
| HARESFIELD | Land at Quedgeley Trading Estate East Haresfield | Application for a business park comprising B1, B2 and B8 | S.18/2528/REM | Yes | B1, B2, B8 | 66011 | 14.8 | - | - | Included seperately as Site SA4a: Quedgeley East |
| HINTON | Howard Tenens (Sharpness) Ltd Sharpness Distri | Erection of 2 no. buildings for light industrial/storage and | S.13/2153/OUT | Yes | B1 ,B8 | 46400 | 9.8 | - | - | Included seperately as Site SA5a: South of Severn Distribution Park |
| HORSLEY | Hay Lane Farm, Hay Lane, Horsley | Change of Use of agricultural building to B8 Storage for up to | - | No | B8 | 891 | 0.09 | No | - | - |
| LONGNEY | Land adjacent to Scotch Firs House Longney | Notification of change of use of building A&B from agricultural | S.13/2231/FUL | No | B1 | 131 | 0.29 | Yes | Yes | - |
| MISERDEN | Land at Wayside Farm, Calf Way, The Camp, | Erection of a B8 storage building | - | No | B8 | 600 | 0.06 | No | - | - |
| NYMPFIELD | Thumbstone Farm Tinkley Lane Nympsfield | Change of use of agricultural building to B8 storage with | - | No | B8, B1 | 180 | 0.02 | No | - | - |
| SLIMBRIDGE | Newhouse Farm, Ryalls Lane, Cambridge | Change of use of agricultural to B1 office use. | - | No | B1 | 100 | 0.01 | No | - | - |
| STONEHOUSE | Plots E and F Stonehouse Park, Sperry Way | Construction of an extension to existing premises for B1 B2 | S.17/1941/FUL | No | B1, B2, B8 | 4744 | 1.03 | Yes | Yes | - |
| STONEHOUSE | Land Adjacent To Oldends Lane, | Construction of two storey B1, B2 and B8 production unit | S.18/0982/FUL | No | B1, B2, B8 | 7340 | 1.83 | Yes | No | - |
| STROUD | 9 Lansdown Stroud | Change of use from D1 to B1(a) | - | No | B1 | 126 | 0.01 | No | - | - |
| STROUD | Space Centre Self Storage, Chestnut Lane | Proposed additional external storage. | - | No | B8 | 150 | 0.01 | No | - | - |
| STROUD | Units 6-9 Salmon Springs Trading Estate, Painswi | Change of use of Units 6 to 9 from cafe (A3) to an office (B1(a)) | - | No | B1 | 300 | 0.04 | No | - | - |
| STROUD | 27 Nelson Street, Stroud | Change of Use of Nightclub to B1(Bakery)/A3 (cafe/bar). | - | No | B1 | 477 | 0.09 | No | - | - |
| WHITMINSTER | Grove End Farm (Adjacent) Grove Lane Whitmins | Demolition of existing buildings and construction of new | S.17/2851/OUT | No | B1, B2, B8 | 1865 | 0.5 | - | - | Same site area as S.17/0072/COU |
| WHITMINSTER | Grove End Farm Grove Lane, Whitminster | Change of use of agricultural and industrial buildings to B1 B2 | S.17/0072/COU | No | B1, B2, B3 | 1800 | 0.52 | Yes | No | - |
| Totals | | | | | | 133132 | 50.74 | | | |

Source: SDC/BE Group, 2020

Employment Sites Analysis

7.8 Table 35 provides a summary of the assessment of the 18 Employment Sites, as outlined in Table 33 above, completed by BE Group over April-December 2020. It considers:

- The Baseline Site supply, hectares
- Comments on landowner/developer plans for the Site
- Reflecting PPGs, evidence is provided on the deliverability of Sites. This includes consideration of the segments of identified market need the Site could meet. This is considered in more detail in Section 9.0 Conclusions, but the broad segments are:
 - Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market
 - Development to meet the needs of a specific business only
 - Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse
 - Local scale expansion/of established Employment Area
 - Growth of technology sectors, including green businesses
 - Meeting needs for larger offices in the Stonehouse area.
- The realistic employment land supply available for adoption in the next Local Plan.

Table 35 – Summary of Employment Sites Assessment

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|------------------------------------|------------------------------|---|---|--------------------------------------|
| 2015 Local Plan Allocations | | | | |
| SA2: West of Stonehouse | 10.00 | <p>Robert Hitchins, Stroud District Council (part of site E5) are owners of the site.</p> <p>Five development plots, E1-5, north and north east of Oldends (Stroudwater) Industrial Estate and forming an extension to that estate and falling within the wider Great Oldbury strategic housing site.</p> <p>Allocated in 2015 Local Plan – Strategic Site SA2</p> <p>Outline consent for a mixed use development comprising up to 1,350 dwellings and 9.3 hectares of employment land; a mixed use local centre comprising use classes E, F; primary school, open space and landscaping, parking and supporting infrastructure and utilities; and the creation of new vehicular accesses from Grove Lane, Oldends Lane and Brunel Way (App. No. S.14/0810/OUT).</p> <p>Main spine roads/access roads for wider Great Oldbury Scheme being delivered.</p> <p>Redrow progressing the Great Oldbury Housing scheme. Hitchins retain control of the employment plots. Currently marketing Plot E4 as Stroudwater 19, 2.43 ha at the end of Oldends Lane. Proposed for two buildings of 1,858 sqm (under offer) and 4,645 sqm as design and build options. Need to seek Reserved Matters consent. Hoping to develop in 2020/21.</p> <p>Then intend to develop E5, another 2.43 ha to the north, which would be opened up by the E4 development and accessed through it. Partly owned by Stroud Council. Plan would be for 2-3 units of 2,787 sqm each. E1-3 would then follow in 2022 plus. Overall, have Outline consent for 35,000 sqm of E/B-Class space.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Some sloping land may not be developable • Watercourses pass through some sites • Assumed other constraints addressed during planning. | <p><i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse.</i></p> <p><i>Meeting needs for larger offices in the Stonehouse area</i></p> <p>Land is under developer control and is being actively marketed, at least the initial plots. The proposed premises are attracting market interest as design and build options with one proposed property under offer. Key infrastructure, to site entrances is being delivered as part of the wider residential scheme.</p> <p>Good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 1,858 sqm plus with rents of £7-7.50/sqft (£75-81/sqm) being achieved.</p> <p>Developer is confident of ultimate delivery of all sites in the short-mid term..</p> | 10.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|---------------------|------------------------------|--|--|--------------------------------------|
| SA3: North East Cam | 11.40 | <p>Bathurst Ltd own the site.</p> <p>Large mixed-use development site, on greenfield agricultural land north east of the Cam Settlement area. Comprises ten development plots, three along Box Road, seven east of Draycott/Middle Mills Industrial Estate and separated from the town by the River Cam. Two plots are proposed for employment uses – E1, off Box Road, and E2, east of Draycott/Middle Mills Industrial Estate.</p> <p>2015 Local Plan Allocation – SA3</p> <p>Outline Consent for a mixed use development of up to 450 dwellings, 10.7 ha of employment land with associated parking and servicing; open space and landscaping including riverside park; flood storage ponds and infrastructure; creation of new vehicular accesses to Draycott (A4135) and Box Road and supporting infrastructure and utilities (App. No. S.15/2804/OUT).</p> <ul style="list-style-type: none"> • Site E1 – Consent for 14,500 sqm of floorspace, 4.17 ha • Site E2 – Consent for 20,165 sqm of floorspace, 6.55 ha. <p>Gives a supply of 10.72 ha</p> <ul style="list-style-type: none"> • Site E1 – Owner was planning to tender for a commercial development partner last spring but Covid-19 has delayed that. Will now go to the market in early 2021. • Site E2 – A new access across the River Cam will open up E2, which can then be marketed, as E1 will be. Assume a 2-3 year window before E2 is accessed and can be brought to the market. <p>Constraints:</p> <ul style="list-style-type: none"> • E1 – Close to sewage works • E2 – Inaccessible without bridge over the River Cam. Partly in flood risk area, Flood Zone 3. <p>Site E2 – The wider area of sites E2 and H3-8 requires a new access road off Draycott Road and a bridge over the River</p> | <p><i>Local scale expansion</i></p> <p>Land is under the control of an experienced developer with a clear plan for bringing the two plots forward. Plans are also being progressed to overcome the access constraints to Plot E2, with the of funding for the River Cam bridge coming through the sale of the higher value housing plots rather than the employment uses</p> <p>This is the man development option for Cam/Dursley, towns with a sizable local business base. Also close to M5.</p> <p>While the outline application was being agreed, the owner received several enquiries from local firms, looking for sites of around 0.4 ha. Mostly for storage or low grade industrial, but also some enquiries for higher value manufacturing and one for a large office.</p> <p>However, the owner does not want to see a low value, piecemeal development here, rather is looking for more comprehensive scheme of industrial or office uses.</p> <p>The recent experience of marketing new build industrial units at Littlecombe Business Park suggests that there is good local demand for freehold industrial units of up to 230 sqm, from mostly local firms.</p> <p>The local office market is largely limited to small Town Centre suites, with no evidence of strong demand for a large new office scheme in Cam/Dursley. Stonehouse, plus Stroud Town Centre, is the identified centre of the District's office</p> | 10.72 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|----------------------|------------------------------|--|--|--------------------------------------|
| | | Cam at a cost of £2 million. Owner sought reserved matters consent for this (App. No. S.19/0758/REM), and owner assumes that consent can be secured within 3 months. The plan is then to pay for this by selling Sites H3-4 to a housebuilder, with an appropriate discount, in exchange for the housebuilder delivering the access. | market, with an existing E(g) (i) cluster and prospects for further growth. There is a reasonable chance Plot E1 will be taken up very early in the Local Plan Period. Development E2 appears a longer term prospect given the need to provide new access across the River Cam. | |
| SA4a: Quedgeley East | 13.00 | <p>St Modwen is owner/developer Located south east of Junction 12, M5 as development of new build industrial/ warehouse park, St Modwen Park, with three units completed to date.</p> <p>2015 Local Plan Allocation – Strategic Site SA4a Consent secured for 86,000 sqm of new B2/B8 floorspace, including the redevelopment of the existing Trading Estate (App. No. S.16/1724/OUT)</p> <p>Delivery Timetable:</p> <ul style="list-style-type: none"> • 2019 Three units delivered of 4,181-6,782 sqm. One let to Aday, one under offer. • 2021 Four more units to be delivered west of the access road. 16,700 sqm total. • 2022 delivery of a large unit of 10,777 sqm plus another of 5,574 sqm, east of the access road • 2023-24 Redevelopment of the Trading Estate for 28,000 sqm of new space. <p>Constraints:</p> <ul style="list-style-type: none"> • Substation on the site. | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i></p> <p>Development being progressed as a continuation of the B2/B8 development St Modwen has been bringing forward continuously at Quedgeley since 2006, so clearly deliverable.</p> <p>Demand from regional/national businesses, most with an existing Gloucester presence. Mid-box units of 2,000-5,000 sqm are in demand. Achieved rents are £6.75/sqft (£72/sqm). Intend to go to £6.95/sqft (£74/sqm) in the next phases to reflect increased construction costs. Ultimately aiming for £7/sqft (£75/sqm) which is still cheaper than equivalent rents in Bristol - £7.50/sqft (£81/sqm).</p> <p>As of late 2020, 4.50 ha has been developed with 8.50 ha still available.</p> | 8.50 |
| SA5: Sharpness Docks | 6.60 | <p>Canal and River Trust own the Docks.</p> <p>Area comprises two parcels of undeveloped land north west and south east of the southern entrance to the Docks, off the B4066 and close to Severn Distribution Park.</p> | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p><i>Local scale expansion of established Employment Area.</i></p> <p>Planning consent is likely here, to be followed by a tender for development partners for the wider</p> | 6.60 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|---|------------------------------|---|--|--------------------------------------|
| | | <p>Consent being sought for 12,000 sqm of E, B2, B8 industrial floorspace and 7,000 sqm of E(g) office or light industrial use as part of a larger scheme (App. No S.17/0798/OUT).</p> <p>Assuming consent, the owners will look to develop the scheme over a 10 year timeframe, with the employment later on in the period. Canal and River Trust have not tendered for development partners yet, have been awaiting consent.</p> <p>The delivery of E/B-Class uses does not appear a strong priority for the owner.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • RAMSAR site • Docks is HSE Consultation site • Old rail infrastructure on north west site • Partly in flood risk area on north west site • Footpath on south east site • South east site is irregularly shaped | <p>scheme. The owners have not planned for delivery beyond this and not marketed plots.</p> <p>Land could offer some further expansion plots for the adjacent Severn Distribution Park, which is an established and growing part of the M5 Corridor logistics market, however, no discussions have taken place between the Canal and River Trust and the owners of the Distribution Park, Howard Tenens, about this. Howard Tenens has not indicated it requires further expansion land, beyond what it already has.</p> <p>Given the area and site constraints it is more likely the land will be brought forward to support the growth of local Dock uses, including waste management, marine services and storage uses. In discussions, Canal and River Trust feel most existing Dock tenants are long established, with no growth needs, however, proposals have been received from Berkeley Vale Heritage Railway for heritage facilities/ engine sheds here.</p> | |
| SA5a: South of Severn Distribution Park | 9.80 | <p>Owned by Howard Tenens.</p> <p>Rectangular expansion site for Severn Distribution Park, south of the existing Park and sharing an access east onto the B4066. The land has been cleared, at least in part, for development.</p> <p>Strategic Allocation SA5a in the adopted 2015 Local Plan.</p> <p>Site has Outline and Reserved Matters consent (App. No. S.13/2153/OUT) for the erection of two buildings for light industrial/storage and distribution purposes. Consented for 46,400 sqm of primarily B8 Space.</p> <p>Long term proposal to meet the growth needs of a Gloucestershire Company that wants to combine three facilities together here.</p> <p>Site appears cleared and it is understood that development is underway.</p> | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p><i>Local scale expansion of established Employment Area.</i></p> <p>Identified growth option now under development to meet specific occupier needs, so clearly deliverable. Despite distance from the M5 Severn Distribution Park has established itself as a key element of the sub-regional and regional logistics market attracting companies from across the county and beyond.</p> <p>Take up likely in the short-mid term.</p> | 9.80 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|---|------------------------------|---|--|--------------------------------------|
| | | Constraints: <ul style="list-style-type: none"> • RAMSAR site • Partly in flood risk area • Water treatment plant to the west. | | |
| 2019 Draft Local Plan, Proposed Strategic Employment Sites | | | | |
| PS19a: North West of Stonehouse | 5.00 | <p>Mixed ownership including:</p> <ol style="list-style-type: none"> 1. Two private individuals (local farms) 2. Gloucestershire County Council <p>Robert Hitchins and Redrow have an option on the County Council land and one of the private ownerships.</p> <p>Large rectangular shaped area of mostly agricultural land, north and east of the Great Oldbury development and west of the railway line.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Two agricultural tenancies on the site • Various farm buildings on the site • Trees onsite • Ecological assessments have still to be completed, but it is assumed that buffers will be required round the site, to the north and east. <p>Robert Hitchins have identified that an access to the employment element will be provided through employment sites E4 and E5 within the Great Oldbury scheme (SA2: West of Stonehouse) and then onto the Great Oldbury spine roads currently being developed. However, no agreements have been reached as to how that access will be delivered, by whom and how it will be funded.</p> <p>The County Council feel that Hitchins/Redrow intend for most of the extra 5 ha of employment to fall onto GCC land rather than apportioning it out in a development agreement, a point of contention between the two parties.</p> | <p><i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse.</i></p> <p><i>Meeting needs for larger offices in the Stonehouse area.</i></p> <p>At the time of writing there are barriers to delivery here including multiple ownerships and the lack of an agreement between those owners and developer Robert Hitchins on the scale and nature of development here, access and the split of costs and values across the ownerships. However, the County Council has now re-engaged with other parties and is looking to provide the leadership required to bring together the other parties and establish an agreement for delivery. Developer, Robert Hitchins, which has been successfully marketing SA2: West of Stonehouse plot E4, remains committed to further delivery here, once the West of Stonehouse Plots E1-5 are delivered.</p> <p>It is expected that development here will represent a continuation of what is already being marketed to the south. That land is seeing good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 1,858 sqm plus with rents of £7-7.50/sqft (£75-81/sqm) being achieved.</p> | 5.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>Development plans still at an early stage however, no timetable set, no agreement on scale/type of uses, etc. The assumption is that Redrow/Hitchins will develop the County Council land alongside that of other parties although this has not been formally agreed.</p> <p>Progress has stalled though the Covid-19 crisis, but the County Council is now looking to resume discussions through agents Alder King. Ultimately, however, development on PS19a unlikely till a substantial portion of Great Oldbury is developed, likely a 5-10 year timeframe.</p> | | |
| PS20: M5 Junction 13 | 10.00 | <p>Ecotricity Group owns the large majority of the site. Two areas of greenfield agricultural land, north and south of the A419, to the immediate south east of Junction 13, M5.</p> <p><i>Northern Site</i></p> <p>Early in 2020, Ecotricity Group received Outline consent for a 5,000-capacity football stadium for Forest Green Rangers. This also includes one full-sized grass pitch and one full-sized all-weather pitch and a goal practice area; car parking for 1,700 cars and coaches in the east of the site and highway improvements to A419 including a signalised site junction and combined cycle/footway (App. No. S.19/1418/OUT).</p> <p>Ecotricity now intend to replace much of the car parking with B2/B8 employment, some E(g) employment closer to the Stadium, plus a hotel and housing.</p> <p><i>Southern Site</i></p> <p>Proposed for leisure/heritage facilities associated with the new cut canal and employment uses adjacent to the A419.</p> <p>Some 8 ha of employment is proposed by Ecotricity in total. Land adjacent to Travelodge (not in Ecotricity ownership) is also being proposed for employment uses and would likely be delivered as a linked scheme although possibly as a later phase, assuming success of the initial scheme.</p> | <p><i>Growth of technology sectors, including green businesses</i></p> <p><i>Meeting needs for larger offices in the Stonehouse area</i></p> <p>In terms of deliverability, a key factor is Ecotricity's willingness to move a large part of its operations here, anchoring the scheme and helping to attract other businesses in similar fields. It is also assumed that Ecotricity, or a retained agent for Ecotricity, would manage the overall scheme.</p> <p>The company has indicated that it has requirements from several other companies in the Ecotricity supply chain, including firms which manufacture PV Cells, which would wish to locate here. Ecotricity is also willing to drive development forward more generally, working through its agents to secure development partners, seek planning, etc.</p> <p>As is noted in Section 3.0, around a quarter of local businesses (5,969 in 2019) and 13.0 percent of jobs (6,780 in 2018) could be said to fall into 'green' sectors. Overall, there were 53,730 green jobs and 9,270 green businesses in Gloucestershire in 2018/19. Not all of these businesses/jobs are in sectors which will require extensive E/B-Class space, but this still represents a sizable body of</p> | 10.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>The new employment is put forward as an 'Eco Park', with all power generated from green energy, a bike path to Stonehouse/Stroud and bus interchange on site.</p> <p>The development would be anchored by Ecotricity which plan to move its R&D and manufacturing facilities onto the site, with the HQ offices staying in Stroud Town Centre.</p> <p>Ecotricity is reworking the area masterplan, in consultation with the Council. It intends to submit a planning application prior to the Local Plan Examination in Public in early 2021.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • North of A419, the focus for E/B-Class use, is unconstrained • Southern site is partly in Flood Risk Area, Flood Zone 3. Main river, River Frome to the south • Southern site also partly in the Industrial Heritage Conservation Area, associated with the Stroudwater Navigation | <p>companies which could potentially take up space in the Eco Park.</p> <p>In practice, it is considered that it should not be for the Council to limit occupancy on the site only to 'green' businesses, but it could be for the scheme managers to enforce. However, there seems to be more general demand from technology sectors here. South Gloucestershire and Stroud College, who have a number of collaborative projects with Ecotricity have identified the Eco Park as a preferred destination for companies seeking grow-on space from the Gloucestershire Science and Technology Park, Berkeley in the 700-20,000 sqm size range.</p> | |
| PS32: Quedgeley East Extension | 5.00 | <p>Colethrop Farm own the site (St Modwen have an option). Strategic site in 2015 Local Plan Allocation.</p> <p>St Modwen have an Option, but Colethrop Farm want to promote the site themselves and secure planning. St Modwen is interested in delivering the land post 2024 as a next stage of St Modwen Park.</p> <p>Although Colethrop Farm accepts that the bulk of the site will be developed for B2/B8 units, by St Modwen, it would like to see land in the south east developed for a facility or units for local firms/start-ups. Feels this would meet a lot of local needs in the surrounding rural area, as well as softening the visual impact of any scheme onto Haresfield Lane in the east. However, Colethrop Farm accepts there has been no market testing of these ideas and no discussions with St Modwen about the future here.</p> <p>Constraints:</p> | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p>Land is under the control of an experienced developer of larger B2/B8 schemes, who has a long history of delivery in the Quedgeley area and represents a logical extension of the adjacent St Modwen Park an established and successful scheme. St Modwen has indicated an intention to develop here, post 2024/25.</p> <p>Local access can be provided through St Modwen Park to the B4008. The growing Quedgeley/Hardwicke/Junction 12, M5 cluster has proven it can attract occupiers from across the county and beyond.</p> <p>Based on experience at St Modwen Park, demand would be from regional/national businesses, most with an existing Gloucester presence. Mid-box units</p> | 5.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <ul style="list-style-type: none"> • Need for extensive ecological mitigation and screening from nearby housing. <p><i>Key Access Issue</i> - With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> | <p>of 2,000-5,000 sqm are required. Rents of around £7/sqft (£75/sqm) would be achievable.</p> <p>Proposal for a micro business facility remain an aspiration only. Although demand in rural areas generally is good, demand for a specific facility here has not been established. However, the development, or not, of this proposal does not impact on the wider deliverability of this site.</p> | |
| PS36: New Settlement at Sharpness | 10.00 | <p>Primarily owned by Sanigar Farm (Greensquare and Lioncourt have an Option).</p> <p>Broad area of strategic greenfield land, bounded by the River Severn to the west, Sharpness Docks/Severn Distribution Park/Sharpless Village to the north, the railway line to the east and Berkeley Pill watercourse to the south.</p> <p>Known as Sharpness Vale Eco settlement or Sharpness Vale: Natural Neighbourhoods.</p> <p>Masterplan developed which proposes:</p> <ul style="list-style-type: none"> • 10 ha employment land • Education Campus/Secondary School • Three new Primary Schools and extended primary school • Up to 5,000 homes. Plan is for 2,400 houses by 2040. 5,000 homes by 2050 | <p><i>Growth of technology sectors, including green businesses (possibly)</i></p> <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i></p> <p><i>Local scale expansion</i></p> <p>The proposed Knowledge Based business park is an ambitious proposal and would be an asset to the District if it could be delivered. In terms of market demand, the site is close to GSTP, Berkeley which has been meeting most demand for accommodation from technology sectors over the last few years, particularly from micro-small businesses looking for affordable premises. One key attraction here is the onsite skills/training facilities provided by owner/operator South Gloucestershire and Stroud College. The College intends to expand GSTP into areas of the facility now being decommissioned</p> | 10.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <ul style="list-style-type: none"> • Railway halt • Retail • Community Uses • Open Space. <p>Intend to submit a planning application to deliver 1,000 homes by end of 2020/early 2021 to link to the Local Plan Examination in Public.</p> <p>The 10 ha of E/B-Class employment is intended for a Knowledge Based business park, aimed at the high-tech sectors to attract graduates and companies from Cheltenham and Gloucester. It would be delivered close to the new Station in the north east of the scheme. As both developers are housebuilders it is not clear who would develop the employment and at what stage in the process, although it is intended to come forward before 2040 as part of Phase 1.</p> <p>There is also no agreement to apportion the development of lower values uses, such as employment between the housebuilders.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Ramsar site on River Severn – Environmental buffer proposed • Woodland on site, assumed several ecological issues will need to be mitigated • South and west is in a flood risk area, Flood Zone 3, albeit with existing flood defences in place. <p>Road access via enhanced B4066 and junction improvements on A38.</p> <p>Rail proposal - Proposed upgrade of an existing freight line, new services and possibly new track will be needed. Half hourly services to Gloucester envisaged.</p> <p>Key Access Issue - There is now a capacity issue at J14, M5. Further, development will trigger the requirement, from</p> | <p>allowing it to meet demand for around the next decade. Mostly comprising refurbishments of existing buildings, GSTP does not provide new, modern space for larger established firms. Local access restrictions also mean it cannot accommodate larger manufacturing or logistics businesses, which generate extensive HGV traffic. To meet larger business requirements in the short-mid term, the College is looking to the Eco Park proposal at Junction 13, M5. Over the longer term, approx. 10-15 years in the future, however, development of a Knowledge Based business park at Sharpness could allow ongoing growth of local firms which began at GSTP and attract further inward investment. The proposed bid to locate STEP (Spherical Tokamak for Energy Production) – a fusion prototype plant – at Oldbury/Berkeley would provide an earlier opportunity here if successful.</p> <p>There are some practical barriers to delivery, however:</p> <ul style="list-style-type: none"> • <i>Delivery/Management</i> – A Knowledge Based business park would require a specialist developer to deliver, to market and to manage premises over the long term to maintain high standards. No such partner has been secured or is understood to have shown an interest at this time • <i>Anchor Occupier</i> – The two other specialist business park schemes proposed in the District, the Eco Park (Junction 13, M5) and the expansion of Renishaw New Mills, both have anchor occupiers secured, Ecotricity and the Renishaw linked company. These businesses will take up a high proportion of the space, ensure development occurs and attract other occupiers from their supply chains/customer | |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> | <p>base to the sites. At Quedgeley and Stonehouse development will build on an extensive critical mass of existing businesses. However, no equivalent anchor exists at Sharpness and existing companies at Sharpness Dock are unrelated to those which might be accommodated at the Knowledge Park.</p> <p>The most likely alternative to the Knowledge Park would be a traditional development of B1/B2/B8 industrial and warehousing, building on the established cluster of the Docks/Severn Distribution Park, reflecting local demand while also meeting the needs of the new households of the Sharpness Eco Settlement. The most likely need would be for modern smaller industrial units to compliment the older stock and larger premises which already exists locally and allow those who are, or would be, homeworking in the area to expand into premises.</p> | |
| PS37: New settlement at Wisloe | 5.00 | <p>Gloucestershire County Council (GCC) and Ernest Cook Trust are the owners (Several agricultural tenancies on the site).</p> <p>Two areas of mostly agricultural land, east and west of the A4135, between the A38 and the M5, north of Cam and south of Slimbridge</p> <p>Put forward as a scheme of 1,500 homes and Stroud District Council indicated that 5 ha of employment land should accompany this, so not the owners/agents' initiative that there should be employment here.</p> <p>The owners have appointed masterplanners on the site, LHC Design but they are at an early stage, producing initial concepts.</p> <p>Very early days, but the initial view is that the employment will be of a local scale, to support the housing and provide hubs for</p> | <p><i>Local scale expansion</i></p> <p>Scheme at the early stages, with no development partners secured or formal agreements signed as to the scale and nature of development or how costs and values will be apportioned between the landowners. The focus of the owners is on housing development with the employment element seen as a secondary feature. Stroud District Council would need to seek clear assurances from the owner/developer partners that the E/B-Class element will be delivered.</p> <p>The owners intend that employment developed here will meet needs generated by the 1,500 homes. This quantum of housing will generate some business requirements but not necessarily in large numbers and those requirements are likely to be for micro business space in multi-let office or</p> | 5.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>local business start-up and growth. Do not plan strategic schemes which would compete with the other proposals in the District. Accordingly, the 5 ha may be delivered as small plots, spread throughout the area, rather than as a single large site.</p> <p>Scheme will be housing led though, with employment delivered once a critical mass of housing is secured. It is not clear who would develop the employment and at what stage in the process.</p> <p>There is also no agreement to apportion the development of lower values uses, such as employment between the owners.</p> <p>Progressing site through Local Plan only at this stage. The owners will not seek planning permission until the Local Plan is adopted.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Existing buildings on site with several tenancies • Will need buffer with M5 • Gas pipeline and watercourse cross site. | <p>light industrial schemes. Such schemes would only be needed late in the development process, when a critical mass of housing has been delivered and may not take up 5 ha, by themselves.</p> <p>The site also links to the Cam/Dursley market, to the south. The recent experience of marketing new build industrial units at Littlecombe Business Park suggests that there is good local demand for freehold industrial units of up to 230 sqm, from mostly local firms. Also, some requirements for manufacturing space/storage uses from local firms looking to grow. The plots at the SA3: North East Cam site are likely to meet a lot of local needs in the short-medium term but land at Wisloe could meet longer term needs here.</p> | |
| PS43: Javelin Park | 9.00 | <p>Colethrop Farm is owner of the site (Tritax Symmetry have an option).</p> <p>Irregular, 'L-Shaped' site to the south and west of the Gloucestershire Energy from Waste facility but forming a distinct development site. Fronts the M5 to the west. Tritax Symmetry believe is undevelopable by itself. Proposing Symmetry Park across combined total area of Javelin Park and the east/ west of Gloucester Road. 186,000 sqm of B2/B8 is proposed.</p> <p>No defined timetable for delivery but feel they could develop rapidly.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Energy from Waste Plant adjacent • Irregular shape | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p>Agree that this irregularly shaped site, adjacent to a large waste facility is not developable by itself, at least not for the larger B2/B8 units that are the focus for demand here. The inclusion of at least some land to the south is required to ensure deliverability.</p> <p>Broader land area is under the control of an experienced developer of larger B2/B8 schemes and via the B4008 enjoys good access to the wider, and growing Quedgeley/Hardwicke/Junction 12, M5 cluster which is growing and has proven it can attract occupiers from across the county and beyond. The larger B2/B8 uses would fit in with the</p> | 9.00 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <ul style="list-style-type: none"> Tritax are presently commissioning a range of site studies to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public. <p><i>Key Access Issue</i> - With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> | <p>adjoining Energy from Waste facility. The larger scheme will also generate greater a capital receipt allowing it to make a more significant contribution to the Junction 12 and 14 improvement requirements, should this be needed.</p> <p>In terms of market demand, there is a strong and ongoing demand for mid-box units in the M5 Corridor, to meet the specific growth requirements of Gloucester companies and to bring in regional/national investment. Logistics demand has only been strengthened by the increase in e-commerce from the Covid-19 related lockdown and there is no sign of demand slowing in the medium-long term. With St Modwen rapidly progressing development to the north, there is a need to look for further/longer term allocations for Quedgeley/Junction 12, M5, although Tritax would probably want to commence relatively early in the Plan Period here.</p> | |
| PS47: Renishaw New Mills | 9.00 | <p>Swinhay Developments (Renishaw) own the site.</p> <p>Agricultural land south and west of the Renishaw plant, and sharing a common access with that plant.</p> <p>Site will house manufacturing facilities for another enterprise of Renishaw owner. Stroud District Council in advanced pre-application discussions over the scale and nature of the development. This use will take up 50-60 percent of the site, i.e., 5.40 ha.</p> <p>As noted above, for Commitments, in completing numerous employment land reviews BE Group has noted that it is normal to exclude, from the realistic supply land which will be held for the exclusive use of an owner and will not be made available to meet wider needs. In effect, this land has become part of the</p> | <p><i>Development to meet the needs of a specific occupier – Plus associated supply chain businesses.</i></p> <p>Plans are well established and progressing for a high value advanced manufacturing business to occupy up to 60 percent of the site. The remaining 3.60 ha remains available and is expected to accommodate related businesses in the supply chain/customer base of the new business and/or Renishaw. No specific occupiers identified but Renishaw confident it can attract businesses, once the main new occupier is established. Renishaw to lead on delivery, tendering for developer partners as needed.</p> | 3.60 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>curtilage of that facility rather than being an open/available employment site.</p> <p>Owner intends to develop the rest to provide a small business park for similar businesses/supply chain companies.</p> <p>Will have common access with Renishaw plant, via roundabout onto the B4058.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Site contains a farm with a listed building. | | |
| Other Sites | | | | |
| Actrees Farm | 2.89 | <p>Private individuals own the site.</p> <p>Dairy Farm off the A38, now accommodating a range of E/B-Class businesses, plus further expansion land to the south and east.</p> <p>Established rural employment site, owner is seeking to secure both existing site and growth land as an allocated Employment Area for the District.</p> <p>However, the owner is seeking to have the wider site, existing E/B-Class premises plus some expansion land, protected in the Local Plan as a developed Employment Area (or under a relevant rural growth policy) rather than be made available as an employment site for development.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Some flood attenuation needed | <p>Successful rural employment site serving a wide rural catchment. The evidence of deliverability here is that in only four years, 1.2 ha of the original farm has been taken up by 15 business, employing 90 people. Almost all are start-ups from the local catchment, with ongoing requirements reported.</p> | 0.0 |
| Downton Ltd | 4.60 | <p>EV Cargo (Downton) own the site.</p> <p>Facilities for existing business (Downtown HQ) comprising HQ offices, Brook Farm (700 sqm), and 11,100 sqm of existing B8 space.</p> <p>Downton is looking to significantly intensify operations here, by redeveloping the whole site, both the existing Downton facilities and the agricultural land, to provide one warehouse of 41,500</p> | <p><i>Development to meet the needs of a specific business only</i></p> | 0.0 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>sqm with ancillary operations offices of 680 sqm. There would be a detached head office complex of 680 sqm as well. This would be new development for the firm, not relocating existing facilities from elsewhere. Could provide up to 200 new jobs, in addition to the 450 already employed here.</p> <p>Timescale may slip due to the impacts of Covid-19 which have resulted in a 30-40 percent reduction in operations in the first half of 2020.</p> <p>However, plan is for a lead in over 2020-21, then a 2 year build program with completion by 2025. Developer would be CPLC.</p> <p>Development to allow the growth of a specific owner-occupier only. Land will not be made available to meet the broader business needs. In discussions. As noted above, for Commitments, in completing numerous employment land reviews BE Group has noted that it is normal to exclude, from the realistic supply land which will be held for the exclusive use of an owner and will not be made available to meet wider needs. In effect, this land has become part of the curtilage of that facility rather than being an open/available employment site.</p> <p>CM Downton highlighted that they wished to see the site allocated as a E/B-Class Employment Area in the next Local Plan, rather than considered as available employment land. As the scale of what is already developed here, and what is proposed in the future, exceeds most small rural industrial estates/business parks, this seems logical.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Gas Main on site – in talks to relocate • Partly in Flood Risk Area • Trees on site • Public footpaths on site – some relocation required. | | |
| Land adjoining Aston Down Business Park | 3.80 | Leda Properties own the site. | <i>Development to meet the needs of a specific business only</i> | 0.0 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
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| | | <p>Irregularly shaped area of brownfield land, north and west of the existing business park, with Cirencester Road to the north.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • In AONB • Foundations of historic buildings on site • Trees • Planning appeals determined re-use of existing buildings as acceptable but expansion beyond the existing site unlikely to be acceptable <p>Proposed allocation here is led by a requirement from a Stroud-based logistics business, whose owner lives close to Aston Down and wishes to move the business here. This business also intends to consolidate operations from other parts of England here. This will take up a third to half the site. Land to meet other requirements, as needed.</p> | <p>Aston Down is a successful rural industrial estate which provides a range of mostly budget quality premises to occupiers from a wide catchment across Stroud District and adjoining local authority areas. The existing scheme is understood to be at or near capacity, which is driving significant growth proposals.</p> <p>The need for this site is driven by a specific business requirement, however.</p> <p>It is not clear if any expansion of the Business Park is permissible in the AONB. However, if it is it would be preferable to focus growth inside the existing allocated area, to minimise impacts on the surrounding countryside. In this regard it is noted that consent is being sought for 13,231 sqm of E/B-Class premises on 5.15 ha (3.38 ha within Stroud District, the rest in Cotswold District) of infill development with the existing Employment Area (App. No. S.20/0716/FUL). This would seem to provide sufficient land to meet the identified business requirement.</p> | |
| Land West of Gloucester Road | 13.10 | <p>Colethrop Farm is owner of the site (Tritax Symmetry have an option). Area of greenfield agricultural land south of Javelin Park and identified as part of a larger logistics scheme. Tritax is proposing Symmetry Park across the combined total area of Javelin Park and the east/west of Gloucester Road. 186,000 sqm of B2/B8 in total:</p> <ul style="list-style-type: none"> • East of Gloucester Road = 82,000 sqm. Three units of 6,689-24,387 sqm • West of Gloucester Road = 104,000 sqm. Seven units of 1,102-58,993 sqm. <p>No defined timetable for delivery but feel they could develop rapidly.</p> <p>Constraints:</p> <ul style="list-style-type: none"> • Trees on site • Tritax are presently commissioning a range of site studies | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p>Land is under the control of an experienced developer of larger B2/B8 schemes and via the B4008 enjoys good access to the wider, and growing Quedgeley/Hardwicke/Junction 12, M5 cluster and has proven it can attract occupiers from across the county and beyond. The larger B2/B8 uses would fit in with the adjoining Energy from Waste facility and the expanded scheme would deliver the draft Javelin Park site allocation which does not appear a deliverable development site by itself. The larger scheme will also generate a greater capital receipt allowing it to make a more</p> | 13.10 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|------------------------------|------------------------------|---|---|--------------------------------------|
| | | <p>to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public.</p> <p><i>Key Access Issue</i> - With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> | <p>significant contribution to the Junction 12 and 14 improvement requirements, should this be needed.</p> <p>In terms of market demand, there is a strong and ongoing demand for mid-box units in the M5 Corridor, to meet the specific growth requirements of Gloucester companies and to bring in regional/national investment. Logistics demand has only been strengthened by the increase in e-commerce from the Covid-19 related lockdown and there is no sign of demand slowing in the medium-long term. With St Modwen rapidly progressing development to the north, there is a need to look for further/longer term allocations for Quedgeley/Junction 12, M5, although Tritax would probably want to commence relatively early in the Plan Period here.</p> | |
| Land East of Gloucester Road | 15.80 | <p>Colethrop Farm is owner of the site (Tritax Symmetry have an option). Greenfield agricultural land, south of the developing St Modwen Park and east of Javelin Park. Tritax is proposing Symmetry Park across the combined total area of Javelin Park and the east/west of Gloucester Road. 186,000 sqm of B2/B8 in total:</p> <ul style="list-style-type: none"> • East of Gloucester Road = 82,000 sqm. Three units of 6,689-24,387 sqm • West of Gloucester Road = 104,000 sqm. Seven units of 1,102-58,993 sqm. <p>No defined timetable for delivery but feel they could develop rapidly. Constraints:</p> <ul style="list-style-type: none"> • Trees on site • Potential impact on local landscape and heritage assets • Tritax are presently commissioning a range of site studies to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public. | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <p>Land is under the control of an experienced developer of larger B2/B8 schemes and via the B4008 enjoys good access to the wider, and growing Quedgeley/Hardwicke/Junction 12, M5 cluster which is growing and has proven it can attract occupiers from across the county and beyond.</p> <p>The larger scheme will also generate greater a capital receipt allowing it to make a more significant contribution to the Junction 12 and 14 improvement requirements, should this be needed.</p> <p>There is a strong and ongoing demand for mid-box units in the M5 Corridor, to meet the specific growth requirements of Gloucester companies and to bring in regional/national investment. Logistics demand has only been strengthened by the increase in e-</p> | 0 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|------------------------------|------------------------------|---|--|--------------------------------------|
| | | <p><i>Key Access Issue</i> - With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> | <p>commerce from the Covid-19 related lockdown and there is no sign of demand slowing in the medium-long term. With St Modwen rapidly progressing development to the north, there is a need to look for further/longer term allocations for Quedgeley/Junction 12, M5.</p> <p>Although this land does link to St Modwen Park to the north it represents a more significant incursion into the countryside than land to the west. One option would therefore be to encourage the delivery of this land as a later phase of development, later in the Plan Period, once development to the north and west is complete and subject to evidence that demand remained strong at that time. The Council would need to gain the support of the developer to ensure the wider scheme was progressed as a multi-phase development.</p> | |
| Land north of Grove End Farm | 13.40 | <p>Chambers Farm and Manor Farm are the main owners of the site (Robert Hitchins has an option). Agricultural land between the A38/Whitminster settlement area and the M5, north east of Junction 13, M5</p> <p>Submission made to Local Plan/SALA Call for Sites for 2,250 new homes along with employment land, a local centre, sports/recreation facilities and a primary school, landscaping and open space</p> <p>In terms of delivery it is anticipated that the Site could deliver around 150 dwellings/year. The first dwellings completed on the Site could be in December 2024 with a 15 year build programme.</p> <p>No timetable for the employment element put forward or details of what that employment land would comprise.</p> <p>The Council is presently consulting on this proposal and considering the traffic impacts of this scheme. A planning application is expected alongside the Local Plan Examination in Public.</p> | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse</i></p> <p>Although only a Local Plan/SALA Call for Sites submission at this stage, with no detailed masterplanning or agreements amongst the landowners about the nature of delivery, this location does have some advantages over the other New Settlement proposals, at least in terms of employment land deliverability. These include the fact that the land is under the control of an experienced developer who is already active in the area, marketing E/B-Class plots at West of Stonehouse, thus knows the local market and business requirements.</p> <p>The employment land is in a very strong location off Junction 13, M5 allowing it to tap into the two core</p> | 13.40 |

| Site Name | Baseline Employment Land, ha | Comments | Market Segments Met Evidence of Deliverability | Realistic Employment Land Supply, ha |
|--------------|------------------------------|---|---|--------------------------------------|
| | | Constraints: <ul style="list-style-type: none"> • Woodland on site • Public rights of way cross the site • Ponds on site • Gas pipeline crosses the site • Proposed cycle route through to the south • Industrial Heritage Conservation Area (associated with River Frome to the south) | <p>markets of the District – larger sub-regional/regional requirements on the M5 Corridor and large business growth in Stroud/Stonehouse.</p> <p>The linear nature of the proposed employment site would prevent development of the very largest B2/B8 units here, but it could still provide some 52,000 sqm of space at standard developer ratios.</p> <p>The site would also benefit from proximity to the Eco Park proposal, which would build up a critical mass of businesses at Junction 13. There could be some competition between the two sites, however, the Eco Park will focus on accommodating businesses with specialisms in green technology. There is no assumption the Land north of Grove End Farm will have a similar, overlapping focus.</p> | |
| Total | 157.39 | | | 119.72 |

Source: BE Group, 2020

Allowing for Losses

- 7.9 Finally, it is necessary to make an allowance for E(g)/B-Class land which has permission for other uses. The Stroud District 2020 Employment Land Availability Report identifies that up to 17.39 ha of land could be lost to other uses if existing permissions are implemented.

Analysis

- 7.10 Table 36 summarises the above analyses, identifying the adjustments made to the Baseline supply of 208.13 ha to achieve a realistic supply figure, specifically:

- Adjustments to the Commitments which indicate that 2.81 ha of the 2020 Commitments of 50.74 ha represents realistic supply, once sites sub 0.25 ha in size and double counting is excluded
- Reflecting standard practice for Employment Land Reviews we are also excluding employment land which will be held for the exclusive use of the owner occupier and will not be made available to meet the needs of any other businesses. Such land would, in effect, form part of the curtilage of existing operations. In addition to 2.27 ha of Commitments, in three sites, also excluded is:
 - Downton Ltd – 4.60 ha – Proposal is for expansion of existing operations only. The owner also wishes the wider site to be allocated as a developed Employment Area, i.e., to enjoy comparable protection to local industrial estates and business parks, rather than as employment development land
 - Across up to 60 percent of PS47: Renishaw New Mills site, 5.40 ha, development will be for the exclusive use of the owner occupier and this land will not be available for wider business use.
- Actrees Farm is a growing rural business park where again the owner is seeking to have the whole 2.89 ha location, developed, consented and expansion land allocated as an Employment Area, or protected through a comparable rural growth policy. Actrees Farm would thus be identified as a developed local business park, with any relevant consents for growth picked up as Commitments
- 4.50 ha at SA4a: Quedgeley East was developed as St Modwen Park, at the time of this Study, and is excluded
- At SA3: North East Cam, 0.68 ha is excluded to reflect differences between the Local Plan allocation and the consented site area.

- Aston Down is a successful rural industrial estate which provides premises to occupiers from a wide catchment across Stroud District and adjoining local authority areas. However, the submission for the allocation of the Land adjoining Aston Down Business Park as employment land is driven by a single business requirement. Previous Planning Appeal rulings indicate that no new build development beyond the existing sites is likely to be acceptable here, given Aston Down's position in the AONB. However, if some growth can be allowed it would be preferable to focus growth inside the existing allocated area, to minimise impacts on the surrounding countryside. In this regard it is noted that consent is being sought for 13,231 sqm of E/B-Class premises on 5.15 ha (3.38 ha within Stroud District, the rest in Cotswold District) of infill development with the existing Employment Area. This would seem to provide sufficient land to meet the identified business requirement
- Allowance is also made for employment land with permission other uses, totalling 17.39 ha in 2020.

Table 36 – Stroud District's Land Supply Scenarios

| Scenario | Cumulative Total Land Supply, ha | Comments |
|--|----------------------------------|---|
| Baseline (Maximum Possible Supply) | 208.13 | All allocated and proposed land, 157.39 ha, plus 50.74 ha of Commitments as of 31/03/2020. The latter as identified in the Stroud District 2020 Employment Land Availability report. |
| Adjustment 1: Exclusion of Commitments which overlap with allocated and proposed sites, or with other Commitments. I.e., excludes double counting of land. | 163.03 | 45.10 ha excluded |
| Adjustment 2: Exclusion of all Commitments affecting less than 0.25 ha of land. | 162.47 | 0.56 ha excluded Reflects Paragraph: 009 (Reference ID: 3-009-20190722) in the Planning Practice Guidance Note 'Housing and Economic Land Availability Assessment', that assessments should only consider sites of 0.25 ha or greater. |
| Adjustment 3: Exclusion of Sites proposed to meet the needs of a single occupier and/or put forward as | 147.31 | 15.16 ha excluded Excludes land to be developed, and occupied, by single businesses which will never be made available to meet wider market needs |

| Scenario | Cumulative Total Land Supply, ha | Comments |
|---|----------------------------------|--|
| Employment Area allocations. | | From Commitments excludes 2.27 ha From allocated and proposed land, excludes: <ul style="list-style-type: none"> • Actrees Farm – 2.89 ha • Downton Ltd – 4.60 ha • PS47: Renishaw New Mills – Reduction in site size by 60 percent, or 5.40 ha to exclude the land which will be held to meet the needs of a single occupier, Renishaw linked company |
| Adjustment 4: Exclusion of land developed as of mid-2020 | 142.81 | Excludes 4.5 ha at SA4a: Quedgeley East developed as St Modwen Park |
| Adjustment 5: Further amendments to reflect stakeholder discussions, planning consents, etc. | 142.13 | SA3: North East Cam – 0.68 ha excluded to reflect differences between the Local Plan allocation and the consented site area. |
| Adjustment 6: Exclusion of Land adjoining Aston Down Business Park as likely not deliverable in planning terms | 138.33 | 3.80 ha reduction |
| Adjustment 7: Reduction allowing for potential losses to other uses as at 31/03/2020 | 120.94 | 17.39 ha of losses, as identified in the Stroud District 2020 Employment Land Availability report |
| Adjustment 8: Possible Further Reduction – Reduced Area to Symmetry Park to minimise incursion into the countryside | 105.14 | Land East of Gloucester Road – 15.80 ha – excluded from allocation or held for the longer term. |
| Realistic Supply, Reflecting the above eight adjustments | 105.14 | - |

Source: BE Group, 2020

7.11 Finally, it is noted that a sizable portion of the development land, 51.40 ha on a net basis, is proposed on greenfield land south of Junction 12, M5 at Quedgeley/Hardwicke. This would be reflective of demand patterns which show the Junction 12 area to be a focus for industrial and warehouse growth, not just for Stroud District but for Gloucester as well and also serving a wider sub-regional/regional motorway-linked market. There has been a steady development of B2/B8 premises in the area since 2006 with no sign of demand slowing here. Indeed, a growing e-

commerce market during the 2020/21 Lockdowns suggests logistics demand will increase further in the short-medium term. Larger strategic developments will also be more able to contribute financially to major highway upgrades at Junction 12.

- 7.12 However, if the scale or nature of the proposed development was judged too large an incursion into the countryside, one option would be to look at a more limited development of Symmetry Park, focused only on land west of Gloucester Road, allowing the development of an expanded Javelin Park site on land south of the Energy from Waste Plant. Land East of Gloucester Road, a more significant incursion into the countryside, would either be excluded from allocation or held as a longer-term growth option. Even with this exclusion, 35.60 ha of employment land would remain in the Quedgeley/Hardwicke area.
- 7.13 Table 36 makes all those adjustments, identifying a realistic supply, for Stroud District of **105.14 ha**.
- 7.14 105.14 ha exceeds the level of employment land need, identified in the ENA Study as 62.4-71.4ha to 2040 (see Section 2.0). However, the additional supply, above need levels, provides a buffer to allow for further losses of employment land, to other uses, to 2040. In the 14 years between 2006 and 2020 28.44ha of E(g)/B class land was lost from B class uses in the District. Although the Study has taken account of known future losses from existing permissions, 17.39 ha at the time of writing, there are likely to be further losses from the local employment stock in the 20 years to 2040, following past trends and potentially increasing due to the new flexibility in changes of use introduced by the E Class. These losses would need replacing and the additional supply identified at this stage will safeguard against any further losses in the baseline supply. This should be subject to active monitoring and feed into future Local Plan reviews.
- 7.15 In terms of the three New Settlement proposals put forward including E/B-Class employment land, the following can be noted:
- Land north of Grove End Farm – Looking only at the employment element, this would seem to be the strongest of the options. Land here is optioned to a commercial developer who is already active locally, marketing/developing E/B-Class plots at SA2: West of Stonehouse, so has existing knowledge of local market conditions. Positioned at Junction 13, M5 it can tap into both the M5 Corridor market and demand for Stonehouse, a centre for both B2/B8 business expansion

in the Stonehouse/Stroud Valleys area and for larger E1(g) (i) offices. It would be well placed to meet longer term growth needs if employment land around Great Oldbury is taken up relatively early in the Plan period. Assuming the Eco Park proposal was brought forward, critical mass around Junction 13 would further increase, with the area becoming a centre for advanced manufacturing in Stroud District

- PS36: New Settlement at Sharpness – Sharpness is far from isolated from Gloucestershire and Bristol markets, and the proposal for a Knowledge Based business park would benefit from a proximity to GSTP which lacks options to meet the needs of larger technology businesses, both firms expanding from its accommodation and inward investors, particularly manufacturing/logistics firms. In the short-mid term, the Eco Park Proposal, if realised, could meet a lot of this need. In the longer term, some 10-15 years, a Knowledge Based business park at Sharpness could be well placed to support further growth. 10-15 years is perhaps a realistic timeframe for the delivery of an employment scheme within the complex Sharpness New Settlement. However, to deliver such a Knowledge Based business park, the Sharpness scheme will need to secure the buy in of a developer/manager willing to retain a longer term interest. Ideally, it would also need the support of anchor occupier willing to take space and draw other occupiers to the area, as seen in the Eco Park/New Mills proposals. If the Knowledge Based business park proposal does not prove deliverable the most likely alternative to the Knowledge Park would be a traditional development of E/B2/B8 industrial and warehousing, building on the established cluster of the Docks/Severn Distribution Park, reflecting local demand while also meeting the needs of the new households
- PS37: New settlement at Wisloe – At the time of writing, proposals at Wisloe for employment land appear to be less well developed than the wider housing-led scheme. No commercial development partners have been secured for the scheme, or are understood to have shown interest, or formal agreements signed as to the scale and nature of development or how the costs and values of the E/B-Class uses, which will generate less capital value than the housing, will be apportioned between the landowners. Without greater clarity on these elements it is difficult to be confident about the ultimate deliverability of the employment element. The owners intend that employment developed here will meet needs generated by the 1,500 homes. This quantum of housing will generate some business requirements but not necessarily in large numbers and those requirements are likely to be for micro business space in multi-let office or light

industrial schemes. Such schemes would only be needed late in the development process, when a critical mass of housing has been delivered and may not take up 5 ha, by themselves. Wisloe does, however, also have the potential to meet the longer-term needs of Cam/Dursley where there appears to be reasonable demand for smaller industrial units.

Geographic Distribution of the Main Employment Sites

- 7.16 Table 37 shows the geographic split of the realistic employment land supply in Stroud District. The 'realistic supply' means the 14 sites including existing allocations in the adopted 2015 Local Plan, proposed sites in the 2019 Draft Local Plan and further submissions made through the Strategic Assessment of Land Availability (SALA) and Local Plan, which are considered to remain deliverable employment land following the above analysis. These total 119.72 ha, before other deductions, noted above, are made. Included in the realistic supply are the sites referenced – SA2, SA3, SA4a, SA5, SA5a, PS19a, PS20, PS32, PS36, PS37, PS43, PS47 as well as Land west of Gloucester Road and Land north of Grove End Farm.
- 7.17 Two thirds of the supply is at Quedgeley/Junction 12, M5 or Stonehouse/Junction 13, M5. This is unsurprising as these locations have been the foci for growth in Stroud District for over 15 years and remain a focus for demand, both in Stroud District and for Gloucestershire more generally. 22.1 percent of the supply is in Sharpness. While there are some delivery concerns with a Knowledge Park, in terms of demand, Sharpness is well connected to the sub-regional property market as evidenced by the growth at Severn Distribution Park and nearby GSTP, Berkeley. 9.0 percent of the supply is in, and around, Cam/Dursley, where local market demand exists, as evidenced by the growth of Littlecombe Business Park.

Table 37 – Location Assessment – Realistic Supply (Main Employment Sites)

| Location | Total, ha | Percentage |
|----------------------------|---------------|--------------|
| Quedgeley/Junction 12, M5 | 35.60 | 29.7 |
| Stonehouse/Junction 13, M5 | 43.40 | 36.3 |
| Sharpness | 26.40 | 22.1 |
| Cam/Dursley | 10.72 | 9.0 |
| Kingswood | 3.60 | 3.0 |
| Total | 119.72 | 100.0 |

Source: BE Group, 2020

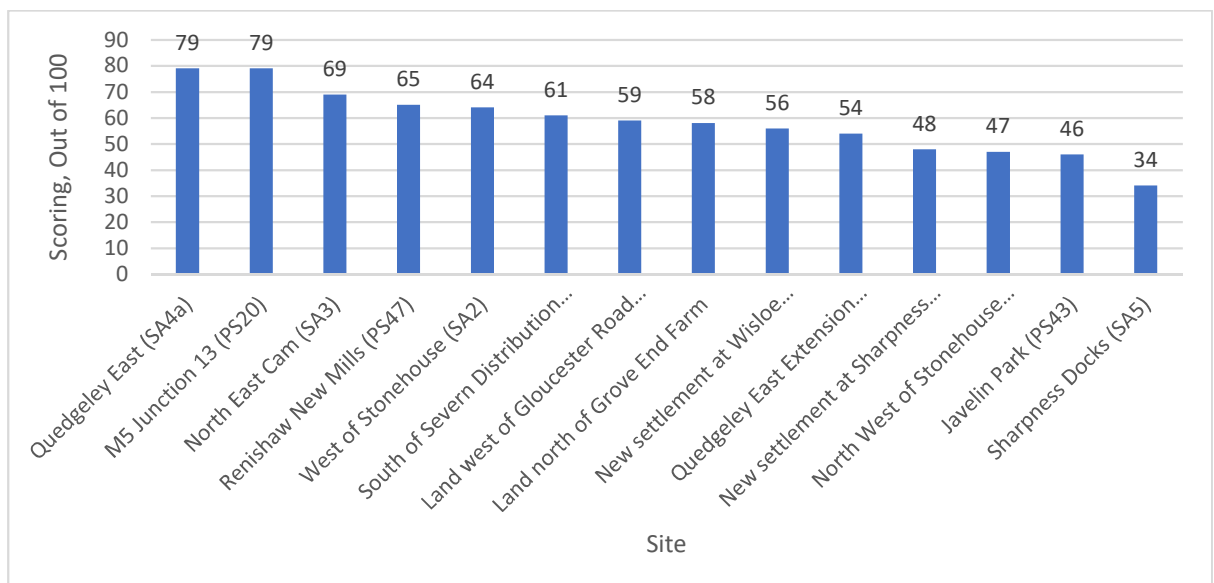
7.18 No new sites are proposed in the Stroud Valleys or in Stroud town itself, although demand research has not shown an urgent need for land here. Additionally, as was shown in Section 6.0, there are several regeneration opportunities in the Employment Areas of the Stroud Valleys, particularly around Brimscombe and Thrupp.

Site Scoring

7.19 As with the Employment Areas, each Site has been scored against ten criteria relating to Site Location and Access, Planning Status, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 5 and individual Site scores can be found in Appendix 8. Figure 16 shows the scoring for the 12 sites identified as comprising Stroud District’s realistic long term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of what sites could be considered priorities for Local Plan allocation and what sites are of secondary value.

7.20 The highest scoring sites are Quedgeley East (SA4a) and PS20: M5 Junction 13, reflecting these sites strong positions on both the M5 and major A Roads; at least some relevant planning consents; lack of constraints and the large, flexible nature of the sites generally. Both sites are under majority control of parties who are actively progressing development options, giving confidence that they can be delivered in a relatively short timeframe.

Figure 16 – Sites Scoring – Realistic Supply (Main Sites)



Source: BE Group, 2020

- 7.21 SA3: North East Cam benefits from a strong position on the edge of the Cam settlement area, including proximity to Cam Railway Station; Outline planning consent and developers in place with clear plans for delivery. Similarly, PS47: Renishaw New Mills, although more peripheral in the District is relatively unconstrained land with clear plans for delivery which are being progressed by owner Renishaw.
- 7.22 The lowest scoring site is SA5: Sharpness Docks. This land is distant from the strategic road network and falls within the Docks area, adjacent to several lower quality waste/storage uses. Outline planning consent has yet to be secured for the wider scheme and although the land is attracting some market interest, the site owner has no clear plans for how, and by whom, the two plots could be brought forward for development.

Summary

- 7.23 The maximum possible employment land supply to 2040, incorporating 2020 Commitments, existing allocations in the adopted 2015 Local Plan, proposed sites in the 2019 Draft Local Plan and further submissions made to Local Plan/SALA/Call for Site exercises is 208.13 ha. However, reflecting good practice, Planning Policy Guidance and the findings of this Study, eight adjustments are made to that supply:
- Adjustment 1: Exclusion of 45.10 ha Commitments which overlap with allocated and proposed sites, or with other Commitments. I.e., excludes double counting of land
 - Adjustment 2: Exclusion of all Commitments affecting less than 0.25 ha of land, 0.56 ha
 - Adjustment 3: Exclusion of 15.16 ha of site proposed to meet the needs of a single occupier and/or put forward as Employment Area allocations
 - Adjustment 4: Exclusion of 4.50 ha land developed as of mid-2020
 - Adjustment 5: Further amendments to reflect stakeholder discussions, planning consents, etc. A reduction of 0.68 ha
 - Adjustment 6: Exclusion of Land adjoining Aston Down Business Park as likely not deliverable in planning terms. A 3.80 ha reduction

- Adjustment 7: Reduction allowing for potential losses due to existing permissions for other uses as at 31/03/2020. 17.39 ha of losses, as identified in the Stroud District 2020 Employment Land Availability report
- Adjustment 8: Possible Further Reduction – Reduced Area to Symmetry Park to minimise incursion into the countryside. Land East of Gloucester Road – 15.80 ha – excluded from allocation or held for the longer term.

7.24 With the above adjustments the realistic employment land supply is **105.14 ha**.

7.25 105.14 ha exceeds the level of employment land need, identified in the ENA Study as 62.4-71.4ha to 2040 (see Section 2.0). However, the additional supply, above need levels, provides a buffer to allow for further losses of employment land, to other uses, to 2040. In the 14 years between 2006 and 2020 28.44ha of E(g)/B class land was lost from in the District. Although the Study has taken account of known future losses from existing permissions, 17.39 ha at the time of writing, there are likely to be further losses from the local employment stock in the 20 years to 2040, following past trends and potentially increasing due to the new flexibility in changes of use introduced by the E Class. These losses would need replacing and the additional supply identified at this stage will safeguard against any further losses in the baseline supply. This should be subject to active monitoring and feed into future Local Plan reviews.

7.26 Of the three New Settlement proposals, despite not having a pre-existing policy background, the Land north of Grove End Farm appears the strongest option, with proposed E/B-Class land sited on Junction 13, M5 and linking to the active Stonehouse employment cluster. The land is optioned to an experienced commercial developer already active in Stonehouse.

7.27 At PS36: New Settlement at Sharpness the proposal for a Knowledge Based business park would benefit from a proximity to GSTP which lacks options to meet the needs of larger technology businesses, both firms expanding from its accommodation and inward investors, particularly manufacturing/logistics firms. In the short-mid term, the Eco Park Proposal, if realised, could meet a lot of this need. In the longer term, some 10-15 years, a Knowledge Based business park at Sharpness could be well placed to support further growth. However, to deliver such a Knowledge Based business park, the Sharpness scheme will need to secure the buy in of a developer/manager willing to retain a longer term interest. Ideally, it would also need the support of anchor

occupier willing to take space and draw other occupiers to the area, as seen in the Eco Park/New Mills proposals. If the Knowledge Based business park proposal does not prove deliverable the most likely alternative to the Knowledge Park would be a traditional development of E/B2/B8 industrial and warehousing, building on the established cluster of the Docks/Severn Distribution Park, reflecting local demand while also meeting the needs of the new households

- 7.28 At the time of writing, proposals at PS37: New settlement at Wisloe are at very early days with plans less well developed as to the E/B-Class elements to be delivered. The owners intend that employment developed here will meet needs generated by the 1,500 homes. This quantum of housing will generate some business requirements but not necessarily in large numbers and those requirements are likely to be for micro business space in multi-let office or light industrial schemes. Such schemes would only be needed late in the development process, when a critical mass of housing has been delivered and may not take up 5 ha, by themselves. Wisloe does, however, also have the potential to meet the longer-term needs of Cam/Dursley where there appears to be reasonable demand for smaller industrial units.
- 7.29 Two thirds of the land supply is at Quedgeley/Junction 12, M5 or Stonehouse/Junction 13, M5. However, this is reflective of both past growth patterns and current demand. No new sites are proposed in the Stroud Valleys or in Stroud town itself, although demand research has not shown an urgent need for land here. Additionally, as was shown in Section 6.0, there are several regeneration opportunities in the Employment Areas of the Stroud Valleys, particularly around Brimscombe and Thrupp.
- 7.30 Site scoring indicates that the prime development sites in the District include Quedgeley East (SA4a) and PS20: M5 Junction 13. Lower value land includes SA5: Sharpness Docks, which has a number of constraints and lacks a clear plan for delivery, although demand exists in the Sharpness area for B2/B8 uses.

8.0 EMPLOYMENT LAND MONITORING ASSESSMENT

Introduction

8.1 Monitoring is an integral part of plan production, a key contributor to the evidence base. As part of this study BE Group has reviewed the monitoring methodology of Stroud District Council to establish whether there is scope for improvement. Also, to consider specific questions raised by the Council as to how it could further enhance and refine its monitoring processes.

Current Methodologies

8.2 Table 38 summarises the current (2020) process used by the Council.

Table 38 – Stroud Monitoring Process

| Stage | Process |
|--|---|
| Officers Responsible | The Council's Senior Planning Strategy Officer oversees the monitoring process for employment/commercial uses including data collection, site visits, analysis and publication of reports and liaising with the other Local Authorities of Gloucestershire. That officer is assisted by a technician approx. 1 day a month for data entry. Housing monitoring is handled separately by another officer. |
| Identification of new Consents | Technician reviews: <ul style="list-style-type: none"> • Planning Reports • Delegated lists • Appeal lists. To identify new planning consents |
| Data Processing | Technician reviews each consent and creates a new data entry in common Access Database for the County, which has been created and is managed by Gloucestershire County Council – Gloucestershire Employment Land Database. Individual Local Authorities cannot see each other's databases, but GCC can see all of them and produces its own reports and research. Measuring Site Size –Uses the red line boundary and the site size, as stated in the Application Form. |
| Consent Monitoring | The progress and completion of developments is checked by: <ul style="list-style-type: none"> • Engagement with Tax Officers to identify new businesses in operation • Site visits to all sites, annually (subject to Covid-19 restrictions for 2020). |
| Further updates to database | Senior Planning Strategy Officer amends both District and County Council databases, as required and reflecting the above site visits, etc. |
| Produce reports on available sites/completions | Annual Employment Land Availability Reports produced. Do not produce larger Authority Monitoring Reports which cover a broader range of Use Classes. |

Source: BE Group and SDC, 2020

8.3 It is first noted that there are well defined personnel with the duty to monitor and

process planning consent data and completions.

- 8.4 The start-point for Council monitoring is Development Control reports on relevant planning consents, combined with reports on successful appeals.
- 8.5 To ensure the accuracy in the site areas monitored BE Group would recommend site sizes be checked either:
- By the Monitoring officer using the Council's Geographic Information Systems (GIS) programme
 - Or by using a standard formula to convert the floorspace into land. BE Group would suggest that around 4,000 sqm of floorspace translates into 1 ha of land used. I.e. 40 percent site coverage, with the rest used for car parking, landscaping, access roads, etc.
- 8.6 Whichever method is chosen, that approach should be kept consistent across all relevant monitoring activity.
- 8.7 Implementation of applications, commencement and completion, is checked visually by the Senior Planning Strategy Officer on an annual basis. This should provide a strong picture of the real-world position. Where relevant, site visits could be combined with the work of Enforcement Officers to pool resources and save time.
- 8.8 Site visits are combined with data provided by Council Tax Officers to help identify where new businesses have come into operation. It is noted that there is no reliance on Building Control records to inform details such as completion and size. This is a positive as in other local authorities where BE Group has reviewed monitoring processes, such records have been found to be some 6-7 months out of date. Indeed, if not already done so, planning monitoring could be provided to Building Control to better inform its activities.
- 8.9 Table 39 schedules the information fields used to record site data. This appears to be a comprehensive record of useful data. However, some other data which could be usefully recorded, for a broader analysis of economic change in Stroud District, includes:
- Job Numbers – An option to provide this is included in the Gloucestershire Employment Land Database, but it is understood this is not filled in by the

District Council. Numbers of jobs created/secured are recorded on planning application forms. While not definitive, this information would be one measure of local jobs growth and change, by Use Class. This data could also be used in future to assess employment densities against differing B Use Classes, and whilst acknowledged as being only indicative, could provide an opportunity for comparison of local level experience against the national (and outdated) figures currently applied to economic forecasts

- Ownerships – Understood to be recorded in some cases, in the Database, but not in others. It would be useful to record site owners for all sites. There could be a range of circumstances where local authorities need to trace property ownerships and having this data to hand, for recent developments/changes of use, could save time and effort. It is accepted, however, that this dataset would have to be kept confidential and secure to satisfy Data Protection rules
- Parking Ratios – An option to provide this is included in the Gloucestershire Employment Land Database, but it is understood this is not filled in by the District Council. Although more relevant in an urban local authority, it may prove useful to record the parking provision agreed for new or amended developments. Building a picture of local parking ratios – in rural areas, settlements and town centres – may help the Local Authority set realistic parking standards for development, ensure consistency in decision making for planning applications and improve knowledge of transport issues generally
- Restrictions on use, hours, etc. – Many commercial consents have operational restrictions placed on them as planning conditions, which remain valid after development completion. It may be beneficial to retain a long term record of such conditions, for reasons including testing the validity of complaints made against the operator and ensuring consistent decisions are made by development control, etc. officers in relation to comparable schemes in comparable locations.

Table 39 – Gloucestershire Employment Land Database – Site Data Recorded

| Data | Comments |
|----------------------|----------------------------|
| Nature of Record | Site Gain/Loss/Completion |
| Site Details | |
| GCC Code/UPRN | Relevant Id. Code Number |
| Parish/Ward | - |
| Site No. | Local Authority identifier |
| Site Owner/Developer | - |

| Data | Comments |
|--|--|
| Site Name | Including site address |
| Grid Ref. Easting/Northing | - |
| Description of Development | What is proposed |
| Site Description – For a Site Gain | |
| Development Type | <ul style="list-style-type: none"> • Greenfield • Brownfield • Change of Use • Conversion • Derelict • Extension • Infill • New Build • Replacement • Mixed Use. |
| Planning Status and Year | <ul style="list-style-type: none"> • In Adopted Local Development Plan • In Unadopted Local Development Plan • OFC • Planning Permission. |
| Relevant Use Classes to be developed/Floorspace to be developed, sqm | - |
| Proposed Employment Band | Number of jobs to be provided from 1 to 1,000 plus It is understood employment data is not recorded by Stroud District Council |
| Employment | <ul style="list-style-type: none"> • Existing jobs • Proposed jobs • Total jobs provision. <p>It is understood employment data is not recorded by Stroud District Council</p> |
| Parking Provision | <ul style="list-style-type: none"> • Car Spaces • HGV Spaces • Cycle Spaces. <p>It is understood parking data is not recorded by Stroud District Council</p> |
| Existing Site Area/Proposed Site Area, ha | - |
| Site Description – For a Site Loss | |
| Development Type | <ul style="list-style-type: none"> • Brownfield • Change of Use <p>Change of Use to</p> |
| Relevant Use Classes to be lost/Floorspace to be lost, sqm | - |
| Employment | <ul style="list-style-type: none"> • Existing jobs • Jobs lost • Remaining jobs <p>It is understood employment data is not recorded by Stroud District Council</p> |

| Data | Comments |
|---|---|
| Existing Site Area/Lost Site Area/Remaining Site Area, ha | - |
| Planning Status and Year | <ul style="list-style-type: none"> • In Adopted Local Development Plan • In Unadopted Local Development Plan • OFC • Planning Permission. |
| Development History | |
| Development Type | Greenfield/Brownfield, Change of Use, Gain/Loss, as previously |
| Development Details | <ul style="list-style-type: none"> • Year of Study – 2018/19, etc. • Floorspace not started, sqm • Floorspace Under Construction, Sqm • Floorspace Completed, Sqm • Date of last inspection of site. |
| Planning History | |
| Planning Application No. | - |
| Type of Consent | Outline, Full, Change of Use, etc. |
| Date of Consent | - |
| Year of Original Consent | - |
| Is the Consent current or lapsed/superseded? | Yes/No |
| Year Lapsed | If relevant |
| Planning Permission Expiry Date | |

Source: SDC and BE Group, 2020

Summary

8.10 Stroud District Council operates an effective monitoring system for commercial/employment development, with robust data collection and analysis processes and with use of site visits rather than reliance on data sources. BE Group's main recommendation for change in procedures would be to avoid using the red line boundaries in planning applications as a measure of the size of development sites as such boundaries frequently overestimate the size of the area affected by a planning consent. As an alternative, BE Group would recommend site sizes be checked either using the Council's GIS programme or by using a standard formula to convert the floorspace into land.

8.11 Alongside the existing data recorded, some other facts found in planning application forms which could be usefully recorded, for a broader analysis of economic change in

Stroud District, include:

- Job Numbers
- Ownerships
- Parking Ratios
- Restrictions on use, hours, etc.

9.0 CONCLUSIONS

Introduction

- 9.1 This study has included a wide-ranging look at the factors affecting Stroud District's economy, with reference to those that are likely to affect the market demand for, and supply of, land and property within the District. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 11.0.
- 9.2 The study has been undertaken in line with both the National Planning Policy Framework and relevant Planning Practice Guidance. It should be read alongside the Gloucestershire Economic Needs Assessment (ENA) which outlines the quantitative need for employment land in Stroud District to 2040. Both the ENA and this Study update previous employment land evidence base documents for the District, notably the 2013 Stroud District Employment Land Study and 2014 Employment Assessment Review, which were also completed by BE Group.

Gloucestershire Economic Needs Assessment

- 9.3 The ENA Study examines annual take up since 2011 and looks at the outputs of two economic forecasts produced by Oxford Economics, a Baseline and Medium-High forecast, and one by Cambridge Econometrics to provide forecasts of employment land need in Stroud District to 2040. Some key findings of that data, also relevant to this Study, include:
- At 11,880 sqm/year, Stroud District's average annual take up rate is the second highest in the county after Tewkesbury, more than double that of Gloucester's and nearly four times that of Cheltenham's. This supports statements made in the ENA's Commercial Property Market assessment that most recent E/B-Class development has taken place outside of the two main urban areas of the county, in locations including Quedgeley/Junction 12, M5
 - Surprisingly, Stroud District has also seen the highest rates of E(g) (i/ii) office development in Gloucestershire, 4,873 sqm/year, again noticeably above rates in Cheltenham and particularly Gloucester. This reflects completions at Stonehouse and Quedgeley as well as developments to meet the needs of local large businesses
 - The three economic forecasts suggest Stroud District will gain 270-6,290 jobs overall, but the bulk of this forecast growth will be in sectors which require E(g)

(i) office premises, 1,820-2,250 extra jobs. Construction will gain 610-1,490 jobs locally. Transportation and storage will gain some 30-200 jobs in Stroud District, fairly modest growth when considered against the sizable B2/B8 schemes which are being delivered/or proposed around Junction 12, M5 in Stroud

- However, this growth is somewhat offset by projected losses in manufacturing of -1,720 - -2,760 jobs to 2040. Such losses do not reflect past development trends which saw 3,779 sqm/year of E(g) (iii)/B2 development in Stroud District since 2011 or the ENA market assessment which indicates good demand for industrial units of 100-1,000 sqm, particularly on the motorway junctions. To address this, the ENA produces two Growth Scenarios which, amongst other changes, increase the manufacturing employment rates to reflect LEP targets on advanced manufacturing growth. This offsets the projected losses to suggest modest manufacturing growth prospects to 2040.

9.4 ENA produces five forecasts based on Labour Demand and three on Labour Supply. The preferred scenarios are the labour supply growth scenario which aligns with demographic growth and takes account of recent growth trends, stakeholder feedback, and the LEP's Local industrial strategy and the labour demand growth scenario which provides a slightly higher figure which would support the continued growth in key sectors of the Gloucestershire economy and support the aims of the GFirst. **These identify needs of 62.4-71.7 ha for Stroud District, to 2040.** As Table 40 shows, around 29 percent of the need is for E(g) (i/ii) office land, the remaining 71 percent for E(g) (iii)/B2/B8 industrial and warehouse uses.

Table 40 – Preferred Scenario Outputs, Hectares

| Use Class | E(g) (i/ii) | | E(g) (iii)/B2/B8 | |
|-----------|----------------------|------------------------|----------------------|------------------------|
| | Labour Supply Growth | Labour Demand Growth 1 | Labour Supply Growth | Labour Demand Growth 1 |
| Stroud | 18.0 | 20.9 | 44.4 | 50.8 |

Source: Gloucestershire Authorities, 2020

Economic Profile

9.5 Stroud District has a growing and highly skilled local population, with few issues of deprivation. In terms of the demand for employment land and premises in the District, the following points can be made.

Manufacturing

- 9.6 Manufacturing continues to dominate the local economy, employing 9,500 in Stroud District in 2018, 18.3 percent of total employment. This is stronger than wider averages by at least 10.0 percent and with an LQ of 2.31, has the second highest degree of specialisation within Stroud District. While most local industrial businesses are likely to be small in size, Stroud District is home to some major employers which give the District strong specialisms in the manufacturing of computer, electronic and optical products; machinery and equipment; fabricated metal products and food production.
- 9.7 Forecasts produced for the ENA Study suggest manufacturing will decline over the next 20 years by some 1,700-2,800 jobs. A declining sector is not in evidence here, indeed manufacturing employment has grown in recent years, by some 500 jobs. As noted, the ENA Study also chose to discount the losses, reflecting other evidence sources in the report. However even if the sector were to lose 2,000 jobs it would still be a major part of the local economy and likely to dominate requirements for land and property.
- 9.8 There are another 750 businesses within the Construction sector locally, employing 3,750 people in 2018. This sector will also generate requirements for industrial space. Initial evidence suggests that Construction could be vulnerable to job losses resulting from the Covid-19 lockdown although it is too early to be sure of the scale and nature of any impacts.

Warehousing/Logistics

- 9.9 Transportation and storage have a fairly modest role in the local economy at present, employing 1,625 in 2018, or 3.1 percent of employment, which is below wider averages. 155 businesses or 2.6 percent of local firms are within the transportation and storage sector, again well below wider averages. This suggests Stroud District's logistics sector is focused in a modest number of large employers, such as Downton and those employers are drawing a lot of labour from outside of the District, which is unsurprising given the focus of local logistics at Quedgeley/Junction 12, M5 on the edge of Gloucester.

Offices

- 9.10 Sectors typically found in private offices, Professional, scientific and technical, ICT and Business administration, account for 10.9 percent of employees. This is lower than

wider averages although still accounting for a not irrelevant 6,075 jobs locally. Financial services have a negligible role in Stroud District's economy, accounting for only 0.5 percent of local employment. Although employment in office-based businesses is below wider averages, the highest proportion of local businesses are in the Professional, scientific and technical sector, 18.4 percent or 1,100 businesses. A high number of businesses and a modest number of employees suggests most businesses in this sector are small, employing an average of three people. Such micro firms will typically require developed property, including multi-let space, more likely to be found in established business schemes/town centres, rather than development land.

- 9.11 The public sector has a modest role in the local economy, public administration and defence, health and education together account for 21.5 percent of local employment, compared to regional and national averages of 26.8-24.9 percent. Overall, employment in health dominates in Stroud although this will primarily reflect employment in local hospitals and clinics, not offices.

Green Jobs

- 9.12 1,500 businesses accommodating 6,780 jobs within Stroud District, at 2018/19, can be calculated as having all or some focus upon being green, i.e. helping to support a low carbon future or deliver other environmental benefits. This accounts for 13.0 percent of local employment and around a quarter of businesses, at least in 2018/19, a sizable proportion, indeed larger than employment in sectors mostly in private offices. Most of this is in somewhat unremarkable sectors such as architecture, waste or construction but does suggest that a reasonable proportion of the local economy could seek space in a Green Business Park, whether that be delivered at Junction 13, M5 or elsewhere. Overall, there were 53,730 green jobs and 9,270 green businesses in Gloucestershire in 2018/19.

Homeworking

- 9.13 According to the 2011 Census, 4,908 people were counted as working from home, 8.18 percent of the working age population in active employment at that time. This proportion is higher than levels seen in South West (6.57 percent) and England (4.96 percent) over the same time frame. The impacts of Covid-19 are likely to include a greater proportion of people working from home permanently, but what level of impact that will have on demand for employment land and property is impossible to estimate at this stage.

Property Market Assessment

- 9.14 Overall, Stroud District has an active local property market which is benefiting from a degree of overspill from Gloucester, particularly for industrial uses. By most measures, local occupancy rates are well above 90 percent for industrial and, to a lesser degree, office space. This suggests an undersupply of premises against demand.
- 9.15 The Covid-19 Pandemic is changing the way the UK's office staff work but this does not mean there will be no requirements for E(g) (i) office space in the future. Demand will include serviced offices which may provide workers with attractive alternatives to homeworking and larger floorplate offices which give the space to achieve social distancing. The impacts on the manufacturing sector have been varied and will be more dependent on the scale and nature of the economic downturn resulting from the Pandemic than the initial lockdown. It is noted that the sectors which have been hard hit to date, including aviation and automotive, do not have a strong role in the local economy. Conversely, food production businesses which have a strong role in the Stroud economy may have actually seen spikes in demand as might companies such as Renishaw which have at least some role in medical technologies.
- 9.16 Experience at schemes such as St Modwen Park and West of Stonehouse suggests that B2 and B8 premises demand is holding up well so far in 2020, with B8 demand particularly benefitting from growth in e-commerce.
- 9.17 Several key sub-area and sub-sector markets have been identified in this study:

Quedgeley/Hardwicke/Junction 12, M5

- 9.18 A focus for industrial and warehouse development for the Gloucester Conurbation, with Gloucester Business Park, Tewkesbury its main competition. Headline rents here are £7/sqft (£75/sqm) with prime rents reaching £8.50/sqft (£92/sqm). Freehold sale values are at £100-150/sqft (£1,076-1,614/sqm) for new build units at Quadrant. The area has an active local industrial market with units of 1,000-4,000 sqm most commonly taken up. In terms of supply, all the available units of more than 3,600 sqm in size, in Stroud District, are found at St Modwen Park and Quadrant 12, with further development proposed at the former.
- 9.19 Stakeholders highlight that the M5 Corridor area is a focus for demand from larger

industrial businesses, specifically Junctions 12-13, extending to Stonehouse. Requirements are for units of up to 5,000 sqm with a particular need for 1,000 sqm properties. Demand for B8 space is only expected to grow here as more retail/wholesale activity moves online as a result of the Covid-19 inspired lockdown.

Stonehouse

9.20 Stonehouse has seen the largest number of industrial transactions over the last decade, in the District, for properties up to 4,000 sqm, with units of 1,000 sqm most commonly transacted. Both freehold and leasehold properties are being transacted. Second-hand rents are around £6/sqft (£65/sqm) and freehold values are around £83-93/sqft (£900-1,000/sqm). Supply is limited, particularly in the core areas of Oldends Industrial Estate and Stonehouse Park/Bonds Mill.

9.21 Stonehouse is a local centre for the office market and a likely focus for future growth. Market activity is focused at Stonehouse Park for larger suites and Bonds Mill for smaller properties. The average transaction was for around 400 sqm, with units all the way up to 2,500 sqm sold/let over the last decade. For smaller suites the average transaction was for 88 sqm. Average rents are £6.30/sqft (£68/sqm) with best rents at Stonehouse Park being £15/sqft (£161/sqm). The focus for supply is Stonehouse Park, in several multi-let schemes, and the Westend Courtyard scheme which forms part of the Stonehouse cluster despite its more rural position. There are few larger, self-contained offices available at this time.

9.22 Office centres such as Stonehouse will potentially benefit from limited demand in Gloucester City Centre and a loss of City Centre supply to housing. However, the development of the Cheltenham Cyber Business Park next to the GCHQ facility will take up a lot of the County's demand from ICT businesses.

Stroud

9.23 The industrial market is focused in the industrial estates of the Stroud Valleys, mostly for older units of less than 500 sqm, which are only attracting modest rents of £2.50-4.50/sqft (£27-48/sqm). Office market activity is focused in the Town Centre and most transactions are for smaller suites, an average of 147 sqm. Average achieved rents are £9.36/sqft (£101/sqm), with a range from £7-12/sqft (£75-129/sqm). Achieved sales values were around £130/sqft (£1,399/sqm). Stroud Town Centre is a key local office market but not superior to Stonehouse or many strong rural locations.

Sharpness

- 9.24 At present industrial activity here is focused around Severn Distribution Park for B2/B8 units of 3,000-5,000 sqm, with further development under construction here. The office market is focused at the GSTP, which has some large office suites available of 1,486-2,769 sqm, freehold and leasehold. While the Sharpness area mostly serves a budget market at present, it was felt there is scope for growth, particularly if a major new settlement was delivered in this area. The area is accessible and could be a focus for demand, albeit secondary to the M5 Corridor.

Cam/Dursley

- 9.25 Market strongly freehold, with units of 93-2,300 sqm transacted at Littlecombe Business Park (new build) and Draycott Business Park. The current supply of industrial units is similarly focused at Littlecombe Business Park. Sale values of £87-92/sqft (£940-990/sqm) were achieved. Existing office market activity is modest and focused in Dursley Town Centre for leasehold suites of 80-400 sqm, achieving around £8/sqft (£86/sqm).

Green Business Parks

- 9.26 Research has been collected on successful green business parks in the UK in relation to their property, services, functionality and businesses. In all cases the 'Green' element comes from the environmentally friendly and sustainable nature of construction, and the services/facilities offered, not nature of the businesses occupying the park. Most have a fairly standard range of occupiers and do not try to limit occupancy to set sectors.

Rural Development

- 9.27 Stakeholders report that Stroud District has an active rural market comprising a number of well-established rural schemes such as Actrees Farm and Westend Courtyard, providing a mixture of office and small workshop space. In the case of Actrees Farm, over the last four years some 1.2 ha has been taken up with accommodation for 15 mostly start-ups/micro business, employing 90 people, in diverse sectors. This shows the strength of rural demand, as does the fact that the schemes examined here are occupied at or near capacity. The quality of schemes varies considerably, at the higher end of the market Westend Courtyard offers high value serviced offices with quoting rents of up to £30/sqft (£322/sqm) all inclusive. In comparison Wayside Farm, The

Camp, Stroud and Taits Hill Industrial Estate, Stinchcombe offer more basic, but still modern, light industrial and storage space.

- 9.28 Such rural schemes have an important market role in providing micro and small firms located in the older industrial/office premises of the Stroud Valleys with opportunities for growth and expansion, and premises which meets modern business needs more generally. Such businesses want modern premises, which are not readily available in many existing Employment Areas, not the design and build development options which are being offered at Employment Sites such as West of Stonehouse. Additionally, the main Employment Sites at Quedgeley/Junction 12, M5 and Stonehouse have been, and are likely to continue to be, developed for larger B2/B8 options. In terms of offices, there is limited availability of smaller suites outside of Stroud Town Centre and several multi-let schemes in Stonehouse. Demand for relocation premises for Stroud Valleys companies is only likely to grow as businesses are displaced by the range of redevelopment schemes proposed in the Valleys Employment Areas.
- 9.29 Rural employment schemes also meet property needs across wide rural catchments, providing affordable small premises from those moving up from homeworking or starting businesses more generally. As noted, Actrees Farm is identified as a focus for local business start-up. In terms of offices, stakeholders assume that rural schemes, along with refurbishments of historic mill properties, will meet a lot of micro business needs.
- 9.30 Generally, the development and expansion of rural schemes to meet the above market needs is happening organically without planning policy guidance.

Stakeholder Engagement

- 9.31 Consultations with various stakeholders were conducted as part of the market research, which comprised key employers, developers/landowners, South Gloucestershire and Stroud College and GFirst.
- 9.32 Most of the major employers of the District have at least some plans for growth over the next five years. So far, these plans are not being significantly altered by the economic impacts of the Covid-19 pandemic, only slightly delayed. In addition to office refurbishments and factory expansions, two major local firms are also seeking to develop more elaborate business park/industrial estate facilities, which will function, at least in part, as supplier parks for the anchor business. These are intended to draw in

inward investment to the District. The only skills shortage identified was for trained ICT staff.

- 9.33 Stroud District has strengths in Advanced Manufacturing and Renewables, key sectors for the county. GSTP at Berkeley is an invaluable facility for promoting start-ups and micro business growth in these, and other technology sectors. With 16 ha already in use, the GSTP intends to expand into the decommissioned nuclear site, another 16 ha, over the next decade. This growth will meet a lot of local needs in the technology sectors, particularly from micro firms. GSTP will not provide grow-on space for businesses, or self-contained units for larger firms, but expect that such needs could be met at the Ecotricity Eco Park scheme at Junction 13, M5. GSTP's growth, combined with the Eco Park, assuming this was delivered, would provide significant competition for a Knowledge Park scheme delivered at the nearby Sharpness New Settlement.
- 9.34 The Golden Valley development in West Cheltenham is expected to meet a lot of needs from the ICT sector generally and Cyber Security specifically. Other growth sectors, key for the South West more generally, are likely to include logistics, production of medical products, food and drink and financial services.

Market Segments

- 9.35 Based on the above market research, six key segments of market demand can be identified which Stroud District's future employment land supply will need to satisfy:
- *Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market* – Junctions 12-13, M5 are a key part of the county's B2/B8 market and particularly the focus for the expansion of larger businesses in the Gloucester Conurbation. Both Quedgeley/Hardwicke and Stonehouse are long established centres for growth
 - *Development to meet the needs of a specific business only* – A number of the District's major employers are actively progressing plans for expansion after being constrained on their existing sites for some years
 - *Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse* – Local industrial and warehouse businesses from the Stroud, Stroud Valleys and Stonehouse areas looking to grow are looking for expansion land primarily in the

Stonehouse/Junction 13, M5 area given the limited supply of modern premises available

- *Local scale expansion/of established Employment Area* – Demand for more local scale business growth, primarily from industrial and warehouse businesses is noted in Sharpness and Cam/Dursley, although the former remains well integrated into the sub-regional economy and capable of attracting investment from further afield
- *Growth of technology sectors, including green businesses* – The success of GSTP, Berkeley has established the strength of the local technology sectors, both industrial and office based. As GSTP mostly meets start-up/micro business needs there is a need for land/property to meet larger business needs. This includes businesses in green sectors which make up a sizable proportion of the local business base
- *Meeting needs for larger offices in the Stonehouse area* – Forecasting for the ENA study predicts sizable increases in office sector employment to 2040, while constrained supply in central Cheltenham and Gloucester provides opportunities for development in peripheral locations. Evidence is that most growth in Stroud District will be from micro businesses who will want premises in multi-let schemes in the town centres, rural schemes and at GSTP rather than development land. Any needs from larger E(g) (i) businesses are likely to be focused in Stonehouse, home to a strong existing office cluster.

Employment Land Supply

9.36 The maximum possible employment land supply to 2040, incorporating 2020 Commitments, existing allocations in the adopted 2015 Local Plan, proposed sites in the 2019 Draft Local Plan and further submissions made to Local Plan/SALA/Call for Site exercises is 208.13 ha. However, reflecting good practice, Planning Policy Guidance and the findings of this Study, eight adjustments are made to that supply:

- Adjustment 1: Exclusion of 45.10 ha Commitments which overlap with allocated and proposed sites, or with other Commitments. I.e., excludes double counting of land
- Adjustment 2: Exclusion of all Commitments affecting less than 0.25 ha of land, 0.56 ha
- Adjustment 3: Exclusion of 15.16 ha of site proposed to meet the needs of a single occupier and/or put forward as Employment Area allocations
- Adjustment 4: Exclusion of 4.50 ha land developed as of mid-2020

- Adjustment 5: Further amendments to reflect stakeholder discussions, planning consents, etc. A reduction of 0.68 ha
- Adjustment 6: Exclusion of Land adjoining Aston Down Business Park as likely not deliverable in planning terms. A 3.80 ha reduction
- Adjustment 7: Reduction allowing for potential losses due to existing permissions for other uses as at 31/03/2020. 17.39 ha of losses, as identified in the Stroud District 2020 Employment Land Availability report
- Adjustment 8: Possible Further Reduction – Reduced Area to Symmetry Park to minimise incursion into the countryside. Land East of Gloucester Road – 15.80 ha – excluded from allocation or held for the longer term.

9.37 These amendments suggest a more realistic supply, for Stroud District of 105.14 ha, including 14 main sites with a gross site area, i.e., without accounting for other deductions, of 119.72 ha (see Table 41).

9.38 105.14 ha exceeds the level of employment land need, identified in the ENA Study as 62.4-71.4ha to 2040 (see above). However, the additional supply, above need levels, provides a buffer to allow for further losses of employment land, to other uses, to 2040. In the 14 years between 2006 and 2020 28.44ha of E(g)/B class land was lost from in the District. Although the Study has taken account of known future losses from existing permissions, 17.39 ha at the time of writing, there are likely to be further losses from the local employment stock in the 20 years to 2040, following past trends and potentially increasing due to the new flexibility in changes of use introduced by the E Class. These losses would need replacing and the additional supply identified at this stage will safeguard against any further losses in the baseline supply. This should be subject to active monitoring and feed into future Local Plan reviews.

Table 41 – Stroud District’s Realistic Employment Land Supply (Main Sites)

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|------------------------------------|---------------------------|--|--|
| 2015 Local Plan Allocations | | | |
| SA2: West of Stonehouse | 10.00 | <p><i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse.</i></p> <p><i>Meeting needs for larger offices in the Stonehouse area</i></p> <ul style="list-style-type: none"> • Land is under developer control and is being actively marketed, at least the initial plots • The proposed premises are attracting market interest as design and build options with one proposed property under offer • Key infrastructure, to site entrances is being delivered as part of the wider residential scheme • Good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 1,858 sqm plus with rents of £7-7.50/sqft (£75-81/sqm) being achieved. • Developer is confident of ultimate delivery of all sites in the short-mid term. | SA2: West of Stonehouse provides the main source of readily available development land in the Stroud Valleys/Stonehouse area at the time of writing and is particularly providing large local firms with options for growth and expansion. Developer Robert Hitchins is actively marketing Plot E4, with strong interest, and expects to develop it in 2020/21. Other plots will then be brought forward to meet further needs, with the take-up of all land expected in the short-mid term. |
| SA3: North East Cam | 10.72 | <p><i>Local scale expansion</i></p> <ul style="list-style-type: none"> • Land is under the control of an experienced developer with a clear plan for bringing the two plots forward for a comprehensive industrial or office development • Plans are being progressed to overcome the access constraints to Plot E2, with the of funding for the River Cam bridge coming through the sale of the higher value housing plots rather than the employment uses • Good evidence of demand, including multiple enquiries received for the plots during the Outline Planning stage. Mostly for storage or low grade industrial, but also some enquiries for higher value manufacturing and one for a large office. The successful recent delivery of Littlecombe Business Park for light industrial/industrial uses also demonstrates local demand. | SA3: North East Cam is the main source of employment land for Cam/Dursley and there is strong evidence of its deliverability. Development would most likely be for industrial or warehouse uses. Development for offices is possible, but unlikely given the modest scale of the local market. Plot E1 is likely to come forward within the next 1-2 years, with E2 representing longer term supply. |
| SA4a: Quedgeley East | 8.50 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i></p> <ul style="list-style-type: none"> • Development being progressed as a continuation of the B2/B8 development St Modwen has been bringing forward continuously at Quedgeley since 2006, so clearly deliverable. • Demand from regional/national businesses, most with an existing Gloucester presence. Mid-box units of 2,000-5,000 sqm are in demand. Achieved rents are £6.75/sqft (£72/sqm). Intend to go to £6.95/sqft (£74/sqm) in the next phases to reflect increased construction costs. Ultimately aiming for £7/sqft (£75/sqm) which is still cheaper than equivalent rents in Bristol - £7.50/sqft (£81/sqm). | SA4a: Quedgeley East is being actively developed by a developer with extensive local experience, who plans to develop out the whole site by 2024. Given the recent rate of development there appears no reason why that would not be achievable. The developer has confirmed it would then be willing to look to the adjacent PS32: Quedgeley East Extension. |

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|---|---------------------------|---|---|
| SA5: Sharpness Docks | 6.60 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market. Local scale expansion of established Employment Area.</i></p> <ul style="list-style-type: none"> • Development planning at very early stages but assuming Outline consent is secured there is a broad plan to tender for development partners for delivery independent of the wider housing scheme • Evidence is that Sharpness is well connected to the sub-regional economy, with prospects for industrial or warehouse development. Local requirements, linked to Severn Distribution Park or the Docks are also likely although not necessarily for high value uses. | <p>The land is available, likely to meet mostly local growth needs with an initial plan for delivery in place.</p> |
| SA5a: South of Severn Distribution Park | 9.80 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market. Local scale expansion of established Employment Area.</i></p> <ul style="list-style-type: none"> • Identified growth option now under development to meet specific occupier needs, so clearly deliverable • Despite distance from the M5 Severn Distribution Park has established itself as a key element of the sub-regional and regional logistics market attracting companies from across the county and beyond • Take up likely in the short-mid term. | <p>Site has Outline and Reserved Matters consent for the erection of two buildings for light industrial/storage and distribution purposes. It would be developed to meet a long term proposal to meet the growth needs of a Gloucestershire Company that wants to combine three facilities together here. The site appears cleared and it is understood that development is underway, so take up is likely in the short term.</p> |
| 2019 Draft Local Plan, Proposed Strategic Employment Sites | | | |
| PS19a: North West of Stonehouse | 5.00 | <p><i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse. Meeting needs for larger offices in the Stonehouse area.</i></p> <ul style="list-style-type: none"> • There are barriers to delivery here including multiple ownerships and the lack of an agreement between those owners and developer Robert Hitchins on the scale and nature of development here, access and the split of costs and values across the ownerships • However, the County Council is taking a leadership role in addressing these issues and coming to an agreement • Site access is allowed for through West of Stonehouse plots E4/5 to the south • Developer, Robert Hitchins, which has been successfully marketing SA2: West of Stonehouse plot E4, remains committed to further delivery here, once the West of Stonehouse Plots E1-5 are delivered | <p>Some delivery questions remain here but key Stakeholders are working to address them. Ongoing monitoring is required by the Council to ensure current disputes can be resolved, but the site remains deliverable in principle and would represent useful further growth land for the active Stonehouse cluster.</p> |

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|--------------------------------|---------------------------|--|---|
| | | <ul style="list-style-type: none"> It is expected that development here will represent a continuation of what is already being marketed to the south. That land is seeing good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. | |
| PS20: M5 Junction 13 | 10.00 | <p><i>Growth of technology sectors, including green businesses</i> <i>Meeting needs for larger offices in the Stonehouse area</i></p> <ul style="list-style-type: none"> Key is Ecotricity's willingness to move a large part of its operations here, anchoring the scheme and helping to attract other businesses in similar fields Ecotricity is willing to drive development forward more generally, working through its agents to secure development partners, seek planning, etc. It is also assumed that Ecotricity, or a retained agent for Ecotricity, would manage/market the overall scheme The company has indicated that it has requirements from several other companies in the Ecotricity supply chain, including firms which manufacture PV Cells, which would wish to locate here There is a sizable body of local businesses which fall into 'Green' sectors and could occupy the facility, although it is anticipated the Park would also meet more general technology requirements including businesses expanding from the GSTP. | <p>The 'Eco Park' is identified by stakeholders as a key scheme for meeting needs from larger technology sectors, including office based and green businesses, as well as allowing a major local employer to expand.</p> <p>In practice, it would not be possible for the Council to limit occupancy on the site only to Green Businesses, that would be for the scheme managers to enforce. However, the Council could work to ensure premises and facilities were delivered to the highest environmental standards, reflecting Ecotricity's aspirations.</p> <p>Some 8 ha of employment is proposed by Ecotricity in total. Land adjacent to Travelodge (not in Ecotricity ownership) is also being proposed for employment uses and would likely be delivered as a linked scheme although possibly as a later phase, assuming success of the initial scheme.</p> |
| PS32: Quedgeley East Extension | 5.00 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i></p> <ul style="list-style-type: none"> Land is under the control of an experienced developer of larger B2/B8 schemes, who has a long history of delivery in the Quedgeley area It represents a logical extension of the adjacent St Modwen Park an established and successful scheme. St Modwen has indicated an intention to develop here, post 2024/25 Local access can be provided through St Modwen Park to the B4008 and the growing Quedgeley/Hardwicke/Junction 12, M5 cluster which is growing and has proven it can attract occupiers from across the county and beyond Based on experience at St Modwen Park, demand would be from regional/national businesses, most with an existing Gloucester presence | <p>A logical expansion site for St Modwen Park, St Modwen has clear plans to deliver this land as a next phase of development for similar uses. Such expansion is supported by demand.</p> |

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|-----------------------------------|---------------------------|---|--|
| | | <ul style="list-style-type: none"> Proposal for a micro business facility remain an aspiration only. Although demand in rural areas generally is good, demand for a specific facility here has not been established. However, the development, or not, of this proposal does not impact on the wider deliverability of this site. | |
| PS36: New Settlement at Sharpness | 10.00 | <p><i>Growth of technology sectors, including green businesses (possibly)</i> <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i> <i>Local scale expansion</i></p> <p>The Knowledge based business park proposal would support the expanding GSTP, meeting the needs of larger firms, particularly inward investors, particularly in the longer term once the Eco Park proposal was complete. However, there are practical barriers to the Knowledge Based business park proposal:</p> <ul style="list-style-type: none"> <i>Delivery/Management</i> – A Knowledge Based business park would require a specialist developer to deliver, to market and to manage premises over the long term to maintain high standards. No such partner has been secured or is understood to have shown an interest at this time <i>Anchor Occupier</i> – The Eco Park (Junction 13, M5) and the expansion of Renishaw New Mills are both ambitious proposals as well, but have key anchor tenants who will serve to draw in other companies and who will support scheme delivery. There is no equivalent here. | <p>The Knowledge based business park proposal could support a growing technology sector in Stroud and Gloucestershire, at least in the long term. However, planning for this business park is still in the very early stages, with the lack of secure/interested developer partners or occupiers making it difficult to come to any firm conclusions on deliverability at this time. The site owners and developers should be asked to provide further evidence which addresses these issues before a E/B-Class allocation was progressed here in the Local Plan.</p> <p>However, even if Knowledge Park is not, ultimately deliverable, it does not mean that no E/B-Class land cannot be provided within this scheme. The most likely alternative to the Knowledge Park would be a traditional development of E/B2/B8 industrial and warehousing, building on the established cluster of the Docks/Severn Distribution Park, reflecting local demand while also meeting the needs of the new households of the Sharpness New Settlement.</p> |
| PS37: New settlement at Wisloe | 5.00 | <p><i>Local scale expansion</i></p> <ul style="list-style-type: none"> Scheme at the early stages, with no development partners secured or formal agreements signed as to the scale and nature of development or how costs and values will be apportioned between the landowners | <p>Site could meet some local needs in the Cam/Dursley and Wisloe area, likely later in the Local Plan period. However, the focus of the owners is on housing development with the employment</p> |

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|------------------------------------|---------------------------|--|--|
| | | <ul style="list-style-type: none"> • The owners intend that employment developed here will meet needs generated by the homes. This quantum of housing will generate some business requirements but not necessarily in large numbers and those requirements are likely to be for micro business space in multi-let office or light industrial schemes. Such schemes would only be needed late in the development process, when a critical mass of housing has been delivered and may not take up 5 ha, by themselves • However, site could also support Cam/Dursley where there is clear demand for light industrial/industrial space. | <p>element seen as a secondary feature. Stroud Council would need to seek clear assurances from the owner/developer partners that the E/B-Class element will be delivered.</p> |
| PS43: Javelin Park | 9.00 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <ul style="list-style-type: none"> • A narrow, irregularly shaped site, adjacent to a large waste facility which is not developable by itself, at least not for the larger B2/B8 units that are the focus for demand here. The inclusion of at least some land to the south is required to ensure deliverability • Broader land area is under the control of an experienced developer of larger B2/B8 schemes and enjoys good access to the wider, and growing Quedgeley/Hardwicke/Junction 12, M5 cluster • The larger scheme will also generate greater a capital receipt allowing it to make a more significant contribution to the Junction 12 and 13 improvement requirements, should this be needed • In terms of market demand, there is a strong and ongoing demand for mid-box units in the M5 Corridor, to meet the specific growth requirements of Gloucester companies and to bring in regional/national investment. | <p>Readily developable site, if incorporated in the wider Symmetry Park scheme. Plans in place could deliver a substantial B2/B8 scheme which would continue the growth of the Quedgeley/Junction 12, M5 area and bring in investment to the District.</p> |
| PS47: Renishaw New Mills | 3.60 | <p><i>Development to meet the needs of a specific occupier – Plus associated supply chain businesses.</i></p> <ul style="list-style-type: none"> • Plans well established and progressing for a high value advanced manufacturing business to occupy up to 60 percent of the site, i.e. 5.4 ha. Renishaw to lead on delivery, tendering for developer partners as needed • The remaining 3.60 ha remains available and is expected to accommodate related businesses in the supply chain/customer base of the new business and/or Renishaw • No specific occupiers identified but Renishaw confident it can attract businesses once the main new occupier is established. | <p>The bulk of the site to be taken up by a single high value occupier with the intention to bring in related businesses to occupy the remaining land. Initial delivery plans appear to be progressing well.</p> |
| Other Sites | | | |
| Land West of Gloucester Road | 13.10 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i></p> <ul style="list-style-type: none"> • Land is under the control of an experienced developer of larger B2/B8 schemes • The larger B2/B8 uses proposed here would fit in with the adjoining Energy from Waste facility and the expanded scheme would allow the development of Javelin Park which does not appear a deliverable development site by itself | <p>The wider Symmetry Park proposal appears readily deliverable and could provide a substantial B2/B8 scheme which would continue the growth of the Quedgeley/Junction 12, M5 area and bring in investment to the District. With</p> |

| Site | Realistic Land Supply, ha | Market Segments Met Evidence of Deliverability | Conclusions |
|------------------------------|---------------------------|---|---|
| | | <ul style="list-style-type: none"> • The larger scheme will also generate greater a capital receipt allowing it to make a more significant contribution to the Junction 12 and 13 improvement requirements, should this be needed • Site enjoys good access to the wider, and growing Quedgeley/Hardwicke/Junction 12, M5 cluster which is growing and has proven it can attract occupiers from across the county and beyond. | St Modwen Park progressing rapidly it could meet ongoing needs here. |
| Land north of Grove End Farm | 13.40 | <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse</i></p> <ul style="list-style-type: none"> • Although less advanced in policy terms than the other New Settlement Proposals with no detailed masterplanning or agreements amongst the landowners about the nature of delivery, this land is under the control of an experienced commercial developer already active locally • The employment land is in a very strong location off Junction 13, M5 allowing it to tap into the two core markets of the District – larger sub-regional/regional requirements on the M5 Corridor and large business growth in Stroud/Stonehouse • The site would also benefit from proximity to the Eco Park proposal. | Speaking solely about the employment land, this proposal appears the strongest of the New Settlement Proposals. Under developer control and seeking to build upon the core Stonehouse Cluster and with direct M5 access it could meet a range of local and sub-regional/regional needs. |
| Total | 119.72 | | |

Source: BE Group, 2020

- 9.39 As Table 41 shows, these 14 sites appear readily deliverable. Key sites around Stonehouse and Quedgeley/Junction 12, M5 fit in well with demand patterns and are mostly under developer control, either through site options or freehold ownership. Those developers are actively progressing plans for change. Elsewhere, major local businesses are progressing growth plans to meet both their own needs and to create linked business/supplier parks. The Eco Park proposal in particular is likely to meet a range of business needs in technology sectors. There are some questions over the delivery of PS19a: North West of Stonehouse which is under multiple ownerships and so far is not being well linked to the wider Great Oldbury scheme. However, under the leadership of the County Council it is likely that a development can ultimately be progressed, building on the critical mass of businesses to the south.
- 9.40 In terms of the three New Settlement proposals put forward including E/B-Class employment land, although only a submission at this stage, Land north of Grove End Farm appears most deliverable. Land here is optioned to a commercial developer who is already active locally, so has existing knowledge of local market conditions. Positioned at Junction 13, M5 it can tap into both the M5 Corridor market and demand for Stonehouse, a centre for both B2/B8 business expansion in the Stonehouse/Stroud Valleys area and for larger E(g) (i) offices. It would be well placed to meet longer term growth needs if employment land around Great Oldbury is taken up relatively early in the Plan period.
- 9.41 Employment land at PS37: New settlement at Wisloe could supply the Cam/Dursley market as well as needs emerging from the new housing, later in the Plan period. However, much more planning is required as to how, by whom and to what timescale the E/B-Class element would be developed before it is possible to be confident of delivery here.
- 9.42 The development of the Knowledge Based business park at PS36: New Settlement at Sharpness has the potential to support the long term growth of GSTP and the technology sector in Gloucestershire. Again, however, there is limited evidence of how, and by whom, delivery would be achieved.

Employment Areas

- 9.43 Updating the 2013 Stroud District Employment Land Study BE Group has reviewed 46 Employment Areas across Stroud District, to consider their current economic value, ongoing viability and suitability for ongoing protection in the emerging Local Plan.

Together they comprise 345.04 ha of land mostly in active E/B-Class use.

9.44 Three of the Areas, totalling 9.19 ha of land, have consent for and/or are in the process of being redeveloped for housing and should be excluded from future Local Plan allocations, for employment uses:

- Site ER5: Dudbridge Industrial Estate, Cainscross, Stroud – No longer an active Employment Area (4.90 ha)
- Site ER6: Coaley Junction Industrial Estate, Draycott, Cam/Dursley – Now a housing development site (0.95 ha)
- Site ER7: Daniels Industrial Estate, Bath Road, Rodborough, Stroud – Likely to be a housing/ retail development site in the future (3.34 ha).

9.45 The remaining 43 Employment Areas are identified as active, well used and viable locations for E/B-Class employment, which should receive ongoing protection, for E/B2/B8 and relevant ancillary uses in the Local Plan. Apart from the ongoing development activity at Quedgeley/Junction 12, M5 and the development of GSTP, in existing premises at the Former Berkeley Power Station, there has been comparatively little change in the Employment Areas since the 2013 Study. Moving forward, regeneration/refurbishment programmes are being progressed in several locations in Brimscombe and Thrupp which may deliver new employment premises, alongside other uses. These could provide employment opportunities for the Stroud Valleys, an area of the District which has no proposed Employment Sites in it.

9.46 All the Areas have been scored out of 100 against criteria assessing accessibility, growth prospects, environmental setting, flexibility and the critical mass of existing businesses. Areas which score 70 out of 100, or more, can be said to be performing excellently against all these criteria. Ten Employment Areas score 70 or higher including most of the main industrial estates of Quedgeley and Stonehouse as well as Site EK21: Aston Down, Minchinhampton. Site ER1: Brimscombe Port Industrial Area, London Road, Thrupp also scores well by virtue of its location and prospects for future growth, albeit for a mix of uses. All of these should receive strong protection in the emerging Local Plan.

9.47 Areas scoring 50-69 represent the more moderate quality employment premises aimed at meeting local business needs. Often however, the scoring reflects their weaker access and smaller size, reducing critical mass, flexibility and prospects for growth,

rather than serious deficiencies in the ongoing viability of the Areas. 26 Areas achieved scores of 50-69 and all are active and well occupied by a diverse range of local businesses. All should be protected in the Local Plan for E/B2/B8 and relevant Sui Generis uses.

- 9.48 Seven Areas scored less than 50 and these locations are of greater concern in terms of the quality of premises, accessibility, location/impact of adjoining uses and critical mass/occupancy. The Council should monitor these locations for further evidence of decline and signs of dereliction. At present however, except for the three locations lost to housing noted above, all continue to function as Employment Areas, meeting business needs and particularly providing the budget accommodation which many micro businesses require. There is no assumption that these locations should not be allocated for E/B-Class uses in the next Local Plan.

Monitoring Arrangements

- 9.49 Current protocols appear to be working well with well-defined personnel with the duty to monitor and process planning consent data and completions. Processes for how new planning consents are identified are clear and the Implementation of applications, commencement and completion is checked visually by the Senior Planning Strategy Officer on an annual basis. Site visits are combined with data provided by Council Tax Officers to help identify where new businesses have come into operation. Data is recorded on a comprehensive database provided by Gloucestershire County Council, although not all aspects of this database are being well used at present.

Use Class Order/Permitted Development Amendments 2020

- 9.50 In September 2020, changes in the Use Classes Order combined A and B1 uses is a new E- Class Use. Permitted Development rights also now allow the conversion of vacant office and industrial properties to housing. For Stroud District, the practical effects of this are likely to include:
- Some conversions of town centre office stock, primarily in Stroud town, although it is not assumed that larger employers will vacate the Town completely. This also supposes a return of demand for retail/other service uses in the Town Centre following the end of the Covid-19 Pandemic and resulting Lockdowns

- Risk of increased retail/service options on out of town office parks although most of Stroud's main Employment Areas provide mostly B2/B8 space which is not affected
- The biggest impacts are likely to be in the Stroud Valleys where the changes would make the conversion of office and light industrial stock to other uses easier. However, this only accelerates existing trends which have seen a lot of older properties converted to retail/trade uses as businesses seek more modern accommodation elsewhere. It may even support regeneration in the Brimscombe and Thrupp areas
- Most recent major losses of industrial stock have been redevelopments rather than changes of use, which would still require consents.

10.0 RECOMMENDATIONS

Introduction

- 10.1 This section sets out the consultants' recommendations arising from the Employment Land Review. The recommendations in this report have had full regard to the requirements of the NPPF to encourage and deliver growth through the planning system.

Employment Land Supply

Recommendation 1 – Employment Land Provision Definition

- 10.2 **It is recommended that the realistically available land supply in Stroud District be defined as 105.14 ha including 14 main sites**, as discussed in Section 7.0.

Recommendation 2 – Consider the Allocation of Grove End Farm as part of Employment Land Supply

- 10.3 Although only a submission at this stage, the employment land appears more deliverable than the other two New Settlement proposals. The land is located in the core market area of Stonehouse, off the M5 and under the control of a developer already active in the area. There is a good chance this employment site could be brought forward even if the other aspects of the mixed-use scheme proposed cannot. **It is therefore recommended that this site is considered for allocation in the Local Plan.**

Recommendation 3 - That the Owners, and their Agents, of PS36: New Settlement at Sharpness be asked to Provide more Evidence on Deliverability

- 10.4 The development of the Knowledge Based business park at PS36: New Settlement at Sharpness has the potential to support the long term growth of GSTP and the technology sector in Gloucestershire. However, delivery of such a complex proposal would require considerable initial investment and a specialist developer/manager willing to retain a longer term interest. Unlike the Eco Park/New Mills proposals, the Knowledge Based business park also lacks an anchor occupier to support the scheme. It is thus not possible for this Study to conclude that this Knowledge Based business park scheme is deliverable based on available evidence. **It is therefore**

recommended that Council require the landowners, through their agents, to submit a plan for delivery addressing these points before any allocation is made in the Local Plan, at least for the employment element.

Recommendation 4 – That the Owners, and their Agents, of PS37: New settlement at Wisloe be asked to Provide more Evidence on Deliverability

- 10.5 Employment land at PS37: New settlement at Wisloe could supply the Cam/Dursley market as well as needs emerging from the new housing, later in the Plan period. The proposal thus has some basis in terms of market demand. However, more information is needed on how the E/B-Class element would be developed here and how higher value and lower value development will be apportioned between different landowners. **It is therefore recommended that Council require the landowners, through their agents, to submit a plan for delivery addressing these points before any allocation is made in the Local Plan, at least for the employment element.**

Recommendation 5 – Allocate the Junction 13, M5 Eco Park Proposal, but with No Restrictions on Occupancy

- 10.6 The Eco Park proposal appears readily deliverable, with strong backing from Ecotricity who will anchor the scheme, provide leadership in delivery, and help to bring in other occupiers from its supply chain/customer base. There is a sizable body of local firms which fall into 'green' sectors, which could require space, while Ecotricity also intends to market the site to inward investors. Additionally, South Gloucestershire and Stroud College, which has an existing relationship with Ecotricity, identifies the Eco Park as the preferred future destination in the short term for companies expanding from GSTP. The site could also be a location for accommodating larger office requirements in the Stonehouse area.
- 10.7 **It is therefore recommended that the Council allocates the Junction 13, M5 Employment Site in the Local Plan. However, it is not recommended that the Council limit occupancy at the Eco Park, by planning condition or similar method, to just 'green' businesses or to other specific sectors.** The reasons for this are:
- It would be largely impossible to enforce such a condition over the long term, if only because of the broad range of businesses which could be considered 'green'

- Where possible, the wider marketability of the scheme should not be limited by restrictions on occupancy
 - Evidence is the Eco Park would have an important role in providing grow on space for technology businesses in the GSTP which may or may not be green sectors, similarly to meet at least some larger office requirements in the Stonehouse area which again may not be from green sectors.
- 10.8 If any occupancy restrictions are placed on the site it will need to be by the scheme's owners and managing agents, with consideration to the factors mentioned above.
- 10.9 Evidence from elsewhere in England is that 'green' business parks are defined by the high quality of the facilities and services they offer, not by the businesses accommodated. **It is therefore recommended that the Council seek, through planning conditions, etc. that the Eco Park be developed to the highest standard with features which could include:**
- **Excellent or outstanding rating from BREEAM**
 - **All energy from renewable sources**
 - **Electric car charging points**
 - **Car sharing initiatives**
 - **High standard of access by foot, bicycle and public transport**
 - **Energy efficient services, plants and equipment**
 - **Facilities which save on water use.**
- 10.10 In discussions Ecotricity identified that it is already planning to include many of these features in the Eco Park.

Recommendation 6 – Employment Areas to be Retained

- 10.11 Of the 46 Employment Areas reviewed for this Study three have been, or are in the process of being, lost to housing:
- Site ER5: Dudbridge Industrial Estate, Cainscross, Stroud
 - Site ER6: Coaley Junction Industrial Estate, Draycott, Cam/Dursley
 - Site ER7: Daniels Industrial Estate, Bath Road, Rodborough, Stroud.
- 10.12 This should be recognised in the Local Plan. The remaining 43 are active, well occupied and viable Employment Areas. **It is Recommended that these continue to**

receive protection as identified under Policies EI1 and EI2/a of the 2019 Draft Local Plan. These policies will need some amendment to reflect the new 'E' Use Class and the changes now permissible within it. However, it is still possible to protect against the loss of larger B2/B8 premises, which are a key part of the District economy, and redevelopment proposals, which have been a feature of recent change in Stroud town.

- 10.13 **More detailed policies could identify the following distinctions within those 43 areas:**

High Quality Areas

- 10.14 The Employment Areas Assessment (Section 6.0) identifies that ten Employment Areas score 70 out of 100, or more in the quantitative analysis. **It is recommended that these be identified as 'High Quality Employment Areas' in the Local Plan and receive protection against the losses noted above.**

- 10.15 High scoring areas include the main industrial estates of Quedgeley/Junction 12, M5 and Stonehouse, which have been the focus of recent B2/B8 industrial and warehouse development and are likely to be the focus of future growth. Schemes in the Quedgeley area also have a strong role in meeting the needs of Gloucester. These should enjoy particularly strong protection in policy. Losses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. Such development should however not prejudice the efficient and effective uses of the remainder of the employment site.

General Employment Areas

- 10.16 26 Employment Areas achieve a score of 50-69. **It is recommended that these be identified as 'General Employment Areas' in the Local Plan and receive protection.** These have an important function in providing a range of employment space and uses within the District and should be protected. Proposals to upgrade facilities and improve the quality of the stock should be supported to ensure the need for B2/B8 use space is met.
- 10.17 Changes of use from the E(g) Use Classes to other uses within the E Use Classes, are now permissible without a Change of Use Consent, on these Employment Areas

and elsewhere. Thus, such change cannot be regulated in the planning system. However, changes of use within the E Use Classes will not necessarily prevent such Employment Areas from continuing to meet local business needs. Trade, relevant retail, and service uses can have a strong role in occupying older industrial/mill premises which are no longer attractive to higher value manufacturing or logistics businesses. Modern industrial estates increasingly accommodate uses such as gyms, nurseries, places of worship and arts facilities, which provide services both to local workers and adjoining communities.

- 10.18 Seven Areas scored less than 50, raising some concerns over their physical quality, etc. The Council should monitor these locations for further evidence of decline and signs of dereliction. However, all continue to be active and well used industrial estates and particularly have a role in providing premises in smaller settlements such as Frampton and Eastington. They should be protected in the Local Plan, as above. The possible exception to this could be EK20: Kingswood Orchestra Works, the lowest scoring area overall and where the current occupier is in administration and may or may not have to sell the buildings. If EK20: Kingswood Orchestra Works does come to the market this isolated, constrained location is unlikely to be attractive to other businesses. If the properties do fall into long term vacancy while Local Plan creation is proceeding **it is recommended it be considered for alternative uses.**

Regeneration of Employment Areas

- 10.19 The above guidance is intended to discourage the incremental loss of land and premises to non E/B-Class uses, damaging the viability of Employment Areas and their ability to meet the needs of E/B-Class businesses. However, several more comprehensive mixed-use redevelopment/refurbishment programmes are proposed which will meet a broader range of needs and particularly provide at least some new E(g)/B2/B8 options in the Stroud Valleys, where no employment sites are proposed. **It is recommended that such proposals be considered on their own merits. The Council could usefully continue to identify locations for redevelopment and regeneration, as is done in Policy EI2 in the Draft Plan. Based on Area scorings, and established plans for change, such Areas could include:**
- **EK4 Brimscombe & Thrupp Hope Mills Industrial Estate**
 - **EK10 Eastington Meadow Mill Industrial Estate – Only if current large occupier were to vacate**
 - **EK20 Kingswood Orchestra Works**

- **EK24 Nailsworth Spring Mill Industrial Estate**
- **ER1 Brimscombe & Thrupp Brimscombe Port Industrial Estate – Regeneration plans in place notwithstanding high scoring**
- **ER2 Brimscombe & Thrupp Brimscombe Mills**
- **ER3 Ham Mills, Griffin Mills Industrial Estate, London Road**
- **ER4 Minchinhampton Wimberley Mills and Dockyard Works**
- **ER8 Stafford Mills Industrial Estate, London Road.**

Recommendation 7 – Allocate Downton HQ, Moreton Valence as an Employment Area

- 10.20 Although only accommodating a single large business, the Downton HQ facility is of a larger scale than other rural employment facilities, indeed it is larger than some of the single occupier Renishaw facilities in the west of the District. The site also accommodates a major employer of national scope, looking to invest in the area. **For these reasons it is recommended that the Downton facility be allocated as an Employment Area in the Local Plan.** Future applications for infill development or expansion could then be dealt with on that basis.

Recommendation 8 – Rural Economic Development

- 10.21 Rural business schemes have an important role providing modern micro business space, both office and industrial, to meet the needs of companies expanding out of older accommodation in the Stroud Valleys and serving the rural catchments more generally. Their importance is only likely to grow as more space in the Valleys is lost to mixed-use regeneration schemes and with the main Employments Sites expected to focus on providing larger B2/B8 options. With these points in mind **it is recommended that, subject to other planning considerations, schemes for rural employment/farm diversification, which are in locations with good road access and are of a scale appropriate to the area, be supported. Applications for the growth of established rural employment locations, which are of a scale appropriate to the area and again which meet other planning criteria, should also be encouraged.**

- 10.22 This is provided for in Local Plan Policy EI4, which allows such growth where:

1. *“The proposal facilitates the retention or growth of local employment opportunity*

2. *The proposal would not cause an unacceptable visual impact on the local character in terms of its siting, scale, materials or site coverage*
3. *There are no suitable alternative buildings or sites that can be used adjacent to the site or locality*
4. *The proposal can avoid harm to local amenities and adjoining land uses particularly where residential uses have been permitted on part of the site*
5. *The proposal would not generate significant traffic movement and volume that would lead to unacceptable environmental impacts or detriment to road safety.”*

10.23 This policy continues to meet rural growth requirements particularly in some of the larger farm conversions noted in this Study.

Other Issues

Recommendation 9 – Future Reviews

- 10.24 This report has shown how market conditions in Stroud District are evolving, with a business base seeking growth to overcome previous limitations on the local supply of land and premises. The Covid-19 pandemic and associated lockdown has delayed many growth projects in 2020, but so far has not resulted in any developers or businesses abandoning proposals. Indeed, a growing e-commerce market, resulting from more people spending more time at home may actually boost B8 demand at Quedgeley/Junction 12, M5. However, this picture could change if a longer term recession is triggered and there will still be negative impacts on local employment.
- 10.25 Across the county, strategic developments are proceeding, including the Golden Valley Business Park in Cheltenham which is expected to take up a lot of demand in the ICT sector in Gloucestershire. Nationally, macro-economic conditions may also change in the light of Brexit. In view of these factors, **it is recommended that Stroud District Council review its employment land portfolio at intervals of around five years.** This is also in accordance with the NPPF which recommends Local Plan, and evidence base, reviews at least once every five years.

Appendix 1

List of Consultees

Appendix 1 – List of Consultees

Alder King

Ash Property

Bennett Jones

Bruton Knowles

Canal and River Trust

CM Downton Ltd (EV Cargo)

Ecotricity

Ernest Cook Trust

GFirst LEP

Gloucestershire County Council

LEDA Properties

Renishaw

Ridge

Robert Hitchins

SGS Commercial Services Ltd (South Gloucestershire and Stroud College)

St Modwen Development

Stantec

Stroud District Council

THP

Tritax Symmetry

WebbPaton

Appendix 2

Green Sector Definitions

Appendix 2 – Green Sector Definitions

| Sub-Sector | SIC Codes |
|-----------------------------------|---|
| Primary | |
| Energy Management | 2521 – Manufacture of central heating, radiators and boilers 2711 – Manufacture of electric motors, generators and transformers 2712 – Manufacture of electricity distribution and control apparatus |
| Environmental Consultancy | 74901 – Environmental consulting activities 74902 – Quantity surveying activities 74909 – Other professional, scientific and technical activities (not including environmental consulting or quantity surveying). |
| Renewable Energy | 4222 - Construction of utility projects for electricity and telecommunications 4291 - Construction of water projects 4299 - Construction of other civil engineering projects nec 4312 – Site preparation 4313 – Test drilling and boring |
| Green Infrastructure | 0210 - Silviculture and other forestry activities 0220 – Logging 0240 – Support services for forestry 81300 – Landscape service activities 71112 – Urban planning and landscape architectural activities 91040 - Botanical and zoological gardens and nature reserve activities |
| Waste & Recycling | 3811 - Collection of non-hazardous waste 3812 - Collection of hazardous waste 3821 - Treatment and disposal of non-hazardous waste 3822 - Treatment and disposal of hazardous waste 3832 - Recovery of sorted materials 3900 - Remediation activities and other waste management services 4677 - Wholesale of waste and scrap 47799 - Retail sale of second-hand goods (other than antiques and antique books) in stores |
| Water Supply & Treatment | 3600 – Water collection, treatment and supply 3700 - Sewerage |
| Secondary | |
| Agriculture, Forestry and Fishing | (Whole sector) |
| Electricity and Energy Equipment | 3511 – Production of electricity 3512 – Transmission of electricity 3513 – Distribution of electricity 2733 – Manufacture of wiring devices 2732 – Manufacture of other electronic and electric wires and cables 2740 – Manufacture of electric lighting equipment 2751 – Manufacture of electric domestic appliances |

| | |
|-------------------------------------|--|
| | <p>2752 – Manufacture of non-electric domestic appliances 2811 – Manufacture of engines and turbines, except aircraft, vehicle and cycle engines 2821 – Manufacture of ovens, furnaces and furnace burners 2825 - Manufacture of non-domestic cooling and ventilation equipment 2790 – Manufacture of other electrical equipment</p> |
| Architects and Technical Services | <p>71111 – Architectural activities 7112 – Engineering activities and related technical consultancy</p> |
| Construction | <p>41100 – Development of building projects 41201 – Construction of commercial buildings 41202 – construction of domestic buildings</p> |
| Electrical and Heating Installation | <p>43210 – Electrical instillation 43220 - Plumbing, heat and air-conditioning installation</p> |
| Sustainable Transport | <p>4910 – Passenger rail transport, interurban 4920 – Freight rail transport 49311 – Passenger transportation by underground, metro and similar systems 49319 – Passenger transport other than by underground etc 4939 – Other passenger land transport</p> |

Source: BE Group and BRES, 2020

Appendix 3

Vacancy Schedules

Appendix 3 - Vacancy Schedules

Table A3 .1 – Industrial Schedule

| Address | Town | Tenure | Size | | Rent (£/Sqm) | Price | Quality | Agent |
|--|------------|--------|-------|--------|--------------|----------|---------|----------------------------|
| | | | Sqm | Sqft | | | | |
| Unit 4, Ebley Industrial Estate, Westward Road | Stroud | LH | 110 | 1,182 | 90.90 | ~ | Good | Ash Chartered Surveyors |
| Unit 6A, Phase 2 Littlecombe Business Park | Dursley | LH/FH | 126 | 1,361 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 6B, Phase 2 Littlecombe Business Park | Dursley | LH/FH | 126 | 1,361 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 6C Phase 2 Littlecombe Business Park | Dursley | LH/FH | 126 | 1,361 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 6D, Phase 2 Littlecombe Business Park | Dursley | LH/FH | 126 | 1,361 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 6E, Phase 2 Littlecombe Business Park | Dursley | LH/FH | 126 | 1,361 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Warehouse, Bridgend Works, Downton Road | Stonehouse | LH | 127 | 1,370 | 40.16 | ~ | Average | Sawyers |
| Unit 1 (Left) , Fromeside Industrial Estate | Stroud | LH | 134 | 1,438 | 70.9 | ~ | Good | Hawkins Watton |
| Unit 1 (Right) , Fromeside Industrial Estate | Stroud | LH | 143 | 1,537 | 66.43 | ~ | Good | Hawkins Watton |
| Unit 5, Stonehouse Commerical Centre | Stonehouse | LH | 207 | 2,233 | 79.71 | ~ | Good | Kurt Wyman |
| Unit 2, Spring Mill Business Park | Nailsworth | LH | 221 | 2,382 | 75.34 | ~ | Good | Kurt Wyman |
| Unit 8, The Quadrant Centre | Hardwicke | LH | 233 | 2,510 | 72.66 | ~ | Good | Alder King |
| Unit 5, The Gabwell Business Centre | Hardwicke | LH | 267 | 2,873 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 10, Gabwell Business Centre | Hardwicke | LH | 274 | 2,947 | 85.77 | ~ | Good | KBW Property Consultants |
| Unit, Mill Farm, Uley Road | Dursley | LH | 307 | 3,300 | 53.83 | ~ | Average | Bennett Jones |
| Unit 7B, Phase 2 Littlecombe Business Park | Dursley | FH | 331 | 3,563 | ~ | £365,000 | ~ | Ash Chartered Surveyors |
| Blocks 1 & 6, Upper Mills Industrial Estate | Stonehouse | FH | 333 | 3,586 | ~ | £215,000 | ~ | Hawkins Watton |
| Unit 1, Wallbridge Industrial Estate | Wallbridge | LH | 358 | 3,855 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Factory Unit, Lower Mills | Brimcombe | FH | 372 | 4,000 | ~ | £225,000 | ~ | Hawkins Watton |
| Industrial Unit | Breadstone | FH | 464 | 5,000 | ~ | ~ | ~ | Bennett Jones |
| Unit 17/18, Griffin Mill Estate | Stroud | LH | 650 | 7,000 | ~ | ~ | ~ | Alder King |
| Severn Distribution Centre | Sharpness | LH | 931 | 10,026 | ~ | ~ | ~ | Savills |
| Unit 9, The Quadrant Centre | Hardwicke | LH | 1,093 | 11,770 | 72.66 | ~ | Good | Alder King |
| Stafford Mill, London Road | Thrupp | FH | 1,268 | 13,647 | ~ | £50,000 | ~ | Hawkins Watton |
| Unit 12, Spring Mill Business Park | Nailsworth | LH | 1,374 | 14,790 | 47.28 | ~ | Average | Kurt Wyman/ Hawkins Watton |
| Units 1&6, Upper Mills Trading Estate | Stonehouse | FH | 3,586 | 38,603 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 6, Gateway 12 Business Park | Quedgeley | LH | 3,842 | 41,355 | ~ | ~ | ~ | Alder King |
| Unit 1, St Modwen Park | Quedgeley | LH | 5,227 | 56,262 | ~ | ~ | ~ | Alder King/ DTRE |
| Unit 1, Gateway 12 Business Park | Hardwicke | LH | 6,237 | 67,138 | ~ | ~ | ~ | St Modwen |
| Unit 3, St Modwen Park | Quedgeley | LH | 6,837 | 73,597 | ~ | ~ | ~ | Alder King/ DTRE |

Source: Radius Data Exchange/Agency Websites, 2020

Table A3.2 – Office Schedule

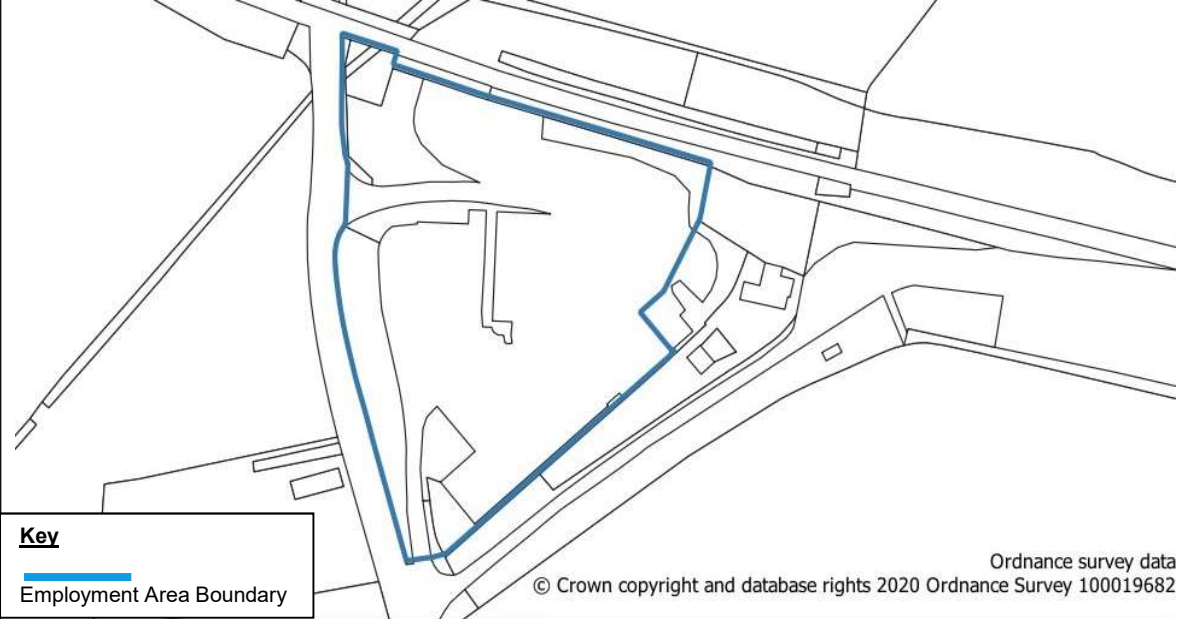
| Address | Town | Tenure | Size | | Rent (£/Sqm) | Price | Quality | Agent |
|--|------------|--------|-------|--------|--------------|----------|---------|--|
| | | | Sqm | Sqft | | | | |
| 9-10, Rowcrot | Stroud | LH | 10 | 103 | 234.00 | ~ | Good | Hawkins Watton |
| Suite 4, 10 John Street | Stroud | LH | 10 | 106 | 300.00 | ~ | Good | Hawkins Watton |
| Suite 5, 10 John Street | Stroud | LH | 10 | 108 | 300.00 | ~ | Good | Hawkins Watton |
| Suite 3, 10 John Street | Stroud | LH | 12 | 127 | 250.00 | ~ | Good | Hawkins Watton |
| Suite 2, 10 John Street | Stroud | LH | 12 | 129 | 300.00 | ~ | Good | Hawkins Watton |
| 2 Annexe, The Wheelhouse, Bond's Mill | Stonehouse | LH | 13 | 141 | 108.46 | ~ | Average | Hawkins Watton |
| Ground Floor, Chedworth House, Lansdown | Stroud | LH | 13 | 143 | 323.08 | ~ | Good | Hawkins Watton |
| Suite 1, 10 John Street | Stroud | LH | 16 | 167 | 187.50 | ~ | Good | Hawkins Watton |
| 1st Floor, Chedworth House, Lansdown | Stroud | LH | 16 | 171 | 281.25 | ~ | Good | Hawkins Watton |
| Office B, Unit A, Station Road Industrial Estate | Stroud | LH | 19 | 202 | 157.89 | ~ | Average | Hawkins Watton |
| 1st Floor, 3 Coassack Square | Nailsworth | LH | 20 | 212 | 240.00 | ~ | Good | Hawkins Watton |
| Suite F, Westend Office Suites, Westend Courtyard | Stonehouse | LH | 21 | 226 | 245.71 | ~ | Good | Hawkins Watton |
| Modular Office, Brunel Way, Stroudwater Business Park | Stonehouse | LH | 22 | 238 | 272.72 | ~ | Good | Frowens Estate Agents/ Ash Chartered Surveyors |
| Suite 14, Westend Office Suites, Westend Courtyard | Stonehouse | LH | 25 | 270 | 321.60 | ~ | Good | Hawkins Watton |
| The Pines Courtyard | Stone | LH | 26 | 275 | 156.92 | ~ | Average | D/P Newland Rennie |
| Suite G, Westend Office Suites, Westend Courtyard | Stonehouse | LH | 27 | 295 | 246.60 | ~ | Good | Hawkins Watton |
| Suite 15, Westend Office Suites, Westend Courtyard | Stonehouse | LH | 27 | 291 | 311.10 | ~ | Good | Hawkins Watton |
| Suite, Westend Courtyard | Stonehouse | LH | 30 | 323 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Ground Floor, Lansdown | Stroud | LH | 34 | 375 | 167.65 | ~ | Good | Frowens Estate Agents |
| 1st Floor, Silver Street | Dursley | LH | 41 | 445 | 102.44 | ~ | Poor | Bennett Jones |
| 1st Floor, London Road | Stroud | FH | 41 | 446 | ~ | ~ | ~ | Frowens Estate Agents |
| Ground Floor, Westview Offices, Paganhill Lane | Stroud | LH | 42 | 453 | 223.71 | ~ | Good | Kurt Wyman/ Hawkins Watton |
| Entire Building, The Camp | Stroud | LH | 46 | 500 | 130.43 | ~ | Average | Moore Allen & Innocent |
| Unit 601, Stonehouse Park | Stonehouse | LH | 53 | 465 | 169.81 | ~ | Good | Ash Chartered Surveyors |
| 1st Floor, Plant House, Lewiston Mill, Toadsmoor Road | Brimscombe | LH | 55 | 588 | 136.36 | ~ | Average | Hawkins Watton |
| Ground Floor, Plant House, Lewiston Mill, Toadsmoor Road | Brimscombe | LH | 57 | 615 | 140.35 | ~ | Average | Hawkins Watton |
| Ground Floor, Russell Street | Stroud | LH | 58 | 633 | 258.62 | ~ | Good | LCP |
| 1st Floor, Offices 6-8, Avening Road, Cotswold Business Park | Nailsworth | LH | 59 | 631 | 156.78 | ~ | Average | Kurt Wyman |
| 1, Gloucester Street, Painswick | Stroud | LH | 62 | 670 | 145.16 | ~ | Average | Hawkins Watton |
| Offices at The Old Town Hall, The Shambles | Stroud | LH | 71 | 761 | ~ | ~ | ~ | Ash Chartered Surveyors |
| 30, Bath Road | Stonehouse | LH | 73 | 788 | 150.68 | ~ | Average | Hawkins Watton |
| Westend Courtyard | Stonehouse | LH | 73 | 788 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Unit 2, Springfield Business Centre, Stonehouse Park | Stonehouse | LH | 74 | 799 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Drake House, Long Street | Dursley | LH | 79 | 850 | 91.50 | ~ | Poor | Ash Chartered Surveyors |
| Former Teazle House, Spring Mill Business Park | Nailsworth | LH | 84 | 909 | 122.00 | ~ | Average | Hawkins Watton |
| Unit 10, Springfield Business Park, Stonehouse Park | Stonehouse | LH | 90 | 970 | 84.80 | ~ | Poor | Hawkins Watton |
| Unit 14, Springfield Business Centre, Stonehouse Park | Stonehouse | LH | 90 | 964 | 111.10 | ~ | Average | Ash Chartered Surveyors |
| Admin Building, Lewiston Mill, Toadsmoor Road | Brimscombe | LH | 100 | 1,079 | 135.00 | ~ | Average | Hawkins Watton |
| 1st Floor, Parsonage Street | Dursley | LH | 121 | 1,300 | 74.38 | ~ | Poor | Bennett Jones |
| Entire Building, Salmon Springs Trading Estate | Stroud | LH | 161 | 1,738 | 91.60 | ~ | Poor | Kurt Wyman |
| Former Custom House, The Docks | Sharpness | LH | 173 | 1,860 | 57.08 | ~ | Poor | Kurt Wyman |
| West Suite, The Mill, Brimscombe Port Business Park | Brimscombe | LH | 176 | 1,899 | 71.02 | ~ | Poor | Bruton Knowles |
| 1st Floor, 101 Stonehouse Park | Stonehouse | LH | 207 | 2,229 | 193.24 | ~ | Good | Hawkins Watton |
| Ground Floor, Eastington Trading Estate | Eastington | LH | 221 | 2,385 | ~ | ~ | ~ | Kurt Wyman |
| Ground Floor, The Mill, Eastington Trading Estate | Stroud | LH | 222 | 2,385 | ~ | ~ | ~ | Kurt Wyman |
| 301, Stonehouse Park | Stonehouse | LH | 237 | 2,554 | 188.29 | ~ | Good | Hawkins Watton |
| Office 8, Wheelwrights Corner, old Market | Nailsworth | FH | 238 | 2,561 | ~ | £200,000 | ~ | Hawkins Watton |
| Coach House, Lewiston Mill, Toadsmoor Road | Brimscombe | LH | 274 | 2,948 | 109.49 | ~ | Average | Hawkins Watton |
| Former Church, 16 Nelson Street | Stroud | LH | 293 | 3,151 | 76.79 | ~ | Poor | Hawkins Watton |
| Unit 1-3A, Stonehouse Commercial Centre, Stonehouse Park | Stonehouse | LH | 308 | 3,313 | 86.00 | ~ | Poor | Kurt Wyman |
| 2nd Floor, Bodley Block, Ebley Mill | Stroud | LH | 309 | 3,321 | 96.89 | ~ | Poor | Ash Chartered Surveyors |
| 1st Floor, Sanctus House, Stonehouse Park | Stonehouse | LH | 346 | 3,725 | 177.64 | ~ | Good | Bruton Knowles |
| Ground Floor, Bodley Block, Ebley Mill | Stroud | LH | 394 | 4,241 | 102.27 | ~ | Poor | Ash Chartered Surveyors |
| Frome House, Bond's Mill, Bristol Road | Stonehouse | LH/FH | 483 | 5,200 | ~ | ~ | ~ | Hawkins Watton |
| 4th & 5th Floor, Bodley Block, Ebley Mill | Stroud | LH | 487 | 5,242 | 96.89 | ~ | Poor | Ash Chartered Surveyors |
| New Imperial House, Station Road | Stroud | FH | 492 | 5,301 | ~ | £575,000 | ~ | Hawkins Watton |
| 1st Floor, Clarendon Court, London Road | Stroud | LH/FH | 516 | 5,550 | ~ | ~ | ~ | Hawkins Watton |
| 602, Stonehouse Park | Stonehouse | LH/FH | 530 | 5,700 | ~ | ~ | ~ | Hawkins Watton |
| 602, Sperry Way | Stonehouse | LH | 530 | 5,700 | ~ | ~ | ~ | Ash Chartered Surveyors |
| Ground Floor Building C11, GSTP | Berkeley | LH | 1,486 | 16,000 | ~ | ~ | ~ | Bruton Knowles/ Cushman and Wakefield |
| John Collier Building, Berkeley Technology Centre | Berkeley | FH | 2,769 | 29,805 | ~ | ~ | ~ | Avison Young |
| 6 rooms, Former Mill Building, Bath Road | Stroud | LH | ~ | ~ | ~ | ~ | ~ | Frowens Estate Agents |
| Offices, Aston Down Business Park | Stroud | LH | ~ | ~ | ~ | ~ | ~ | Hawkins Watton |


Source: Radius Data Exchange/Agency Websites, 2020

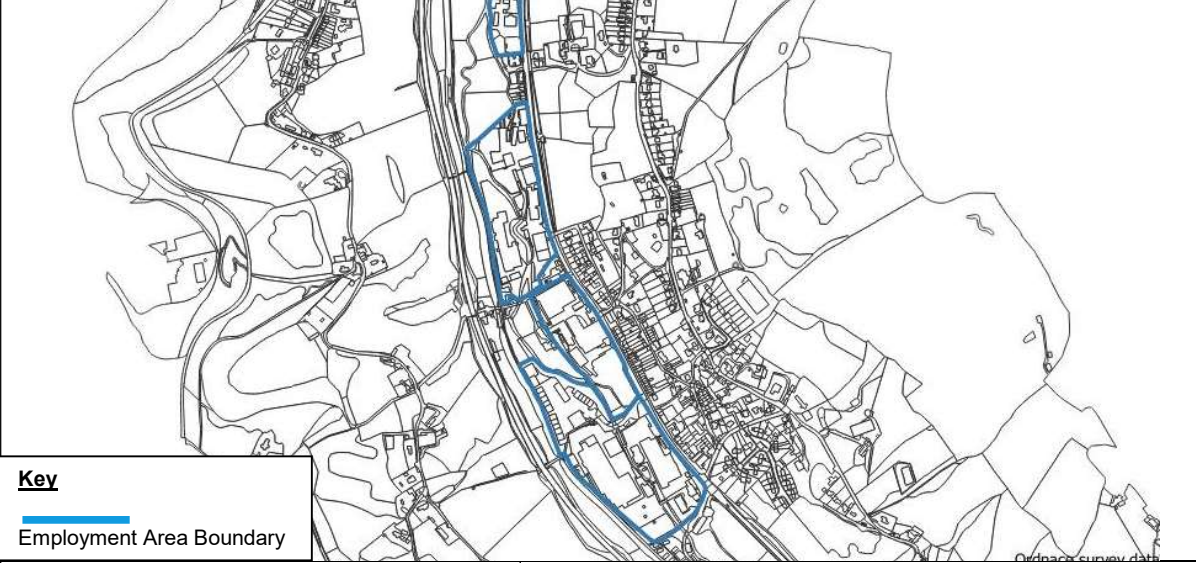
Appendix 4

Employment Area Proformas

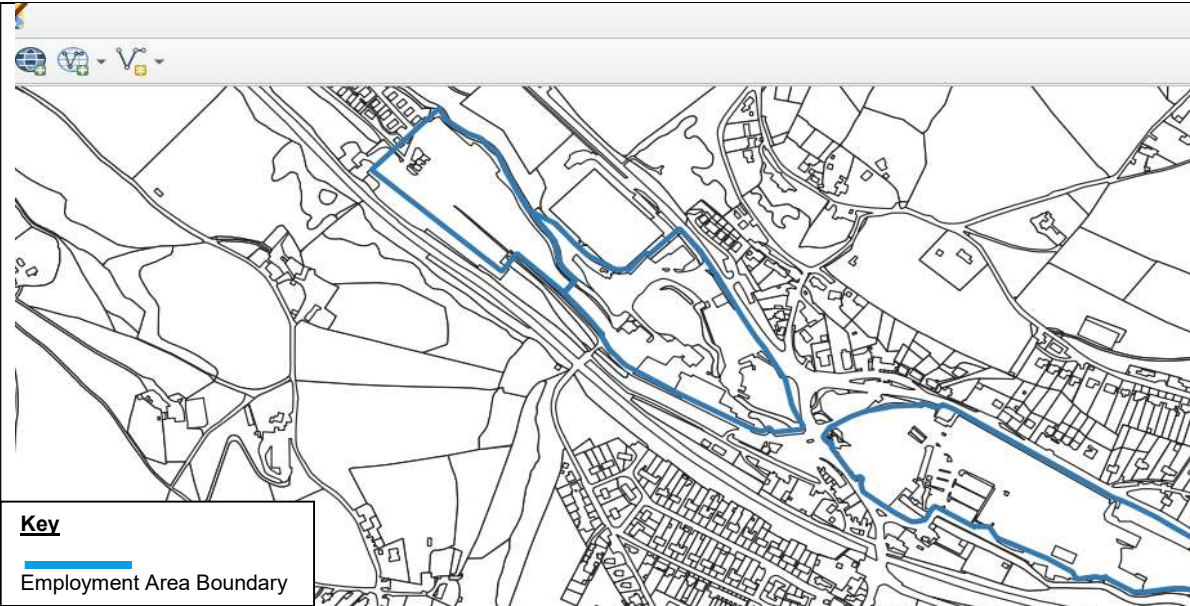
Appendix 4 – Employment Area Proformas



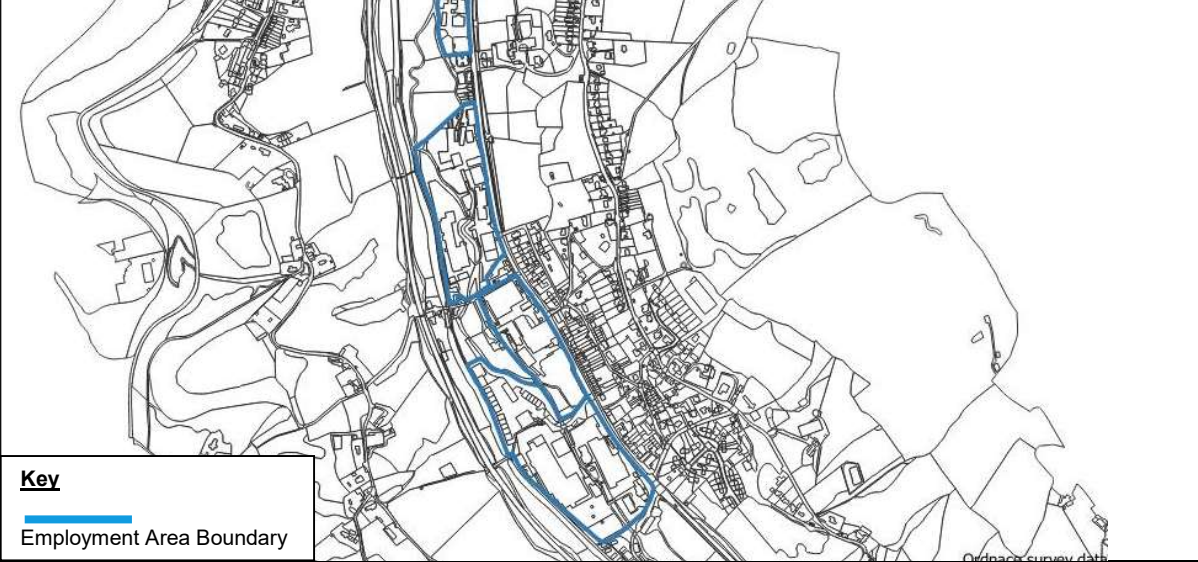
| | |
|--|---|
| Key | |
|  Employment Area Boundary | |
| | Ordnance survey data © Crown copyright and database rights 2020 Ordnance Survey 100019682 |
| Area Reference | Local Plan 2015, Policy E11, Site EK1 |
| Name | Rigestate, Station Road, Berkeley |
| Description | Small industrial estate in an isolated rural location |
| Occupier(s) | Multiple – Including Mobex Exhibition Specialists |
| Prominence | Low |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 0.96 |
| Building Age | Post 1960, one modern unit (two more consented) |
| Building Quality | Moderate |
| Access Constraints | Narrow, sloping access road |
| Distance to M5 Motorway, km | 10 |
| Distance to A-road, km | 3 – A38 |
| Distance to Rail Station, km | 11 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | On bus route (Station Road) |
| Distance to Services, km | 1 – Berkeley local shops (Marybrook Street/Market Place) |
| Car Parking | Poor – Limited parking available in front of the units |
| Constraints | Partly in flood risk area Sloping area Trees in the area |
| Scoring | 50 |
| Opportunities for redevelopment/ expansion | Small, dense industrial estate, bounded by railway line to the north. Small scale infill development has occurred or has consent in the north of the site, taking up plots previously used for vehicle parking. Little further infill land remains available without the loss of trees which screen the Area from the road. |
| Other Information | - |





| Key | |
|---|---|
| Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy E11, Site EK3 |
| Name | Griffin Mills Industrial Estate, Thrupp |
| Description | Moderate quality industrial estate, comprising several sub-divided mill properties which house office, industrial, craft and retail firms. Plus, space for a large employer in the south. |
| Occupier(s) | Multiple – Including Nu Pro, Pegasus Art Shop |
| Prominence | High |
| Current Use (Use Classes) | E(g)/B2/B8 |
| Size, ha | 3.50 |
| Building Age | Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10.4 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 2.4 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2 – Stroud Town Centre |
| Car Parking | Moderate – Limited parking available around the mills |
| Constraints | In flood risk area In Conservation Area Includes listed buildings Trees in the area |
| Scoring | 56 |
| Opportunities for redevelopment/ expansion | Although there may be further opportunities to refurbish and remodel the mills, these buildings presently provide a useful function accommodating new/micro workshop, office and craft/retail businesses. More significant redevelopment would require major alteration to listed buildings. At present, there is no evidence of any demand for such a project. |
| Other Information | - |
| Recommendations | Although there may be (limited) opportunities for refurbishment/remodelling, the priority should be to protect these buildings as an important source of small business space in the Stroud Valleys. |



| Key | |
|--|---|
| Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy E11, Site EK4 |
| Name | Hope Mills Industrial Estate, Thrupp |
| Description | Established, moderate quality industrial estate in a backland location |
| Occupier(s) | Multiple – Including Staitech, Hercules Propellers |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii)/B2/B8 |
| Size, ha | 2.08 |
| Building Age | Mostly Post-1960 |
| Building Quality | Moderate |
| Access Constraints | Access to the north is via a residential area |
| Distance to M5 Motorway, km | 11 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 3 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2.4 – Stroud Town Centre |
| Car Parking | Moderate – Limited parking available at some units |
| Constraints | In flood risk area In Conservation Area Trees in the area Recreation areas adjacent. |
| Scoring | 47 |
| Opportunities for redevelopment/ expansion | Most land and property in full use. Regeneration areas to the south, around Ham Mills, are considered separately. Expansion of the estate elsewhere is constrained by surrounding uses. |
| Other Information | - |
| Recommendations | Moderate quality industrial estate, serving the Stroud Valleys. Hope Mills Industrial Estate should be protected for employment uses in the Local Plan. |



| | |
|---|---|
| Key | |
|  | Employment Area Boundary |
| Area Reference | Local Plan 2015, Policy EI1, Site EK5 |
| Name | Phoenix Industrial Estate, Thrupp |
| Description | Estate of moderate quality terraced industrial units, with some larger occupiers, in more modern or refurbished accommodation, in the south |
| Occupier(s) | Multiple – Including Howard Tenens, Stroud Brewery Bar, PTS and Impcross |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii)/B2/B8 |
| Size, ha | 5.18 |
| Building Age | Post 1960 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10.4 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 2.4 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2 – Stroud Town Centre |
| Car Parking | Good – Private parking available all units |
| Constraints | In flood risk area In Conservation Area Trees in the area |
| Scoring | 70 |
| Opportunities for redevelopment/ expansion | Most land and property in full use. Regeneration areas to the north, around Ham Mills, are considered separately. Expansion of the estate elsewhere is constrained by surrounding uses. |
| Other Information | - |
| Recommendations | Moderate quality industrial estate, serving the Stroud Valleys and accommodating some major employers who have invested in their premises. Phoenix Industrial Estate should be protected for employment uses in the Local Plan. |

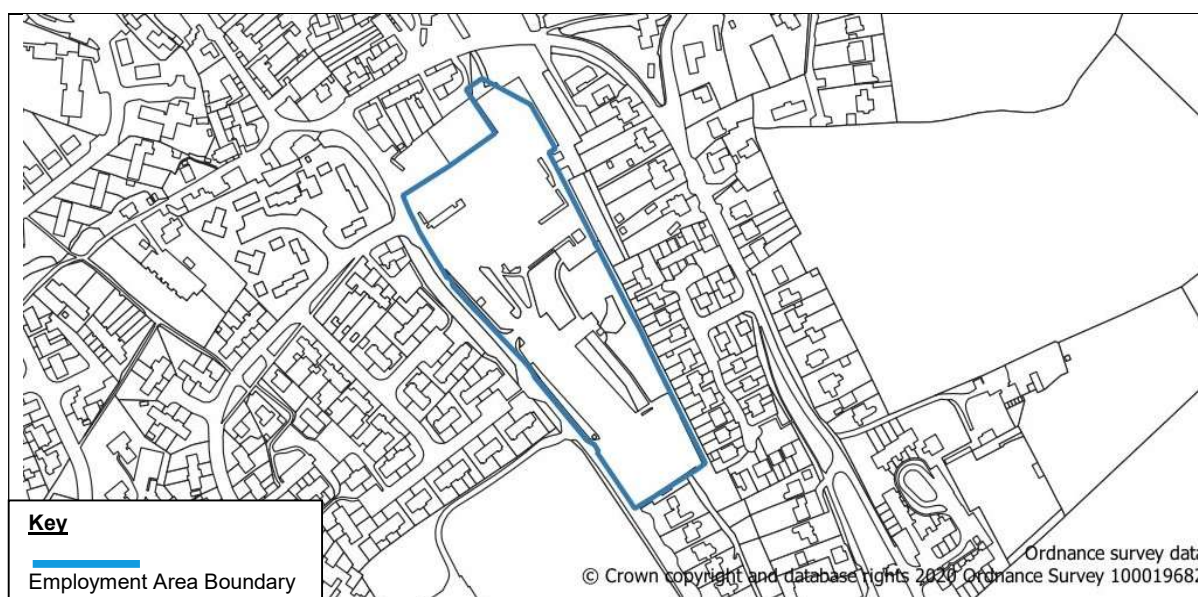


Key
Employment Area Boundary

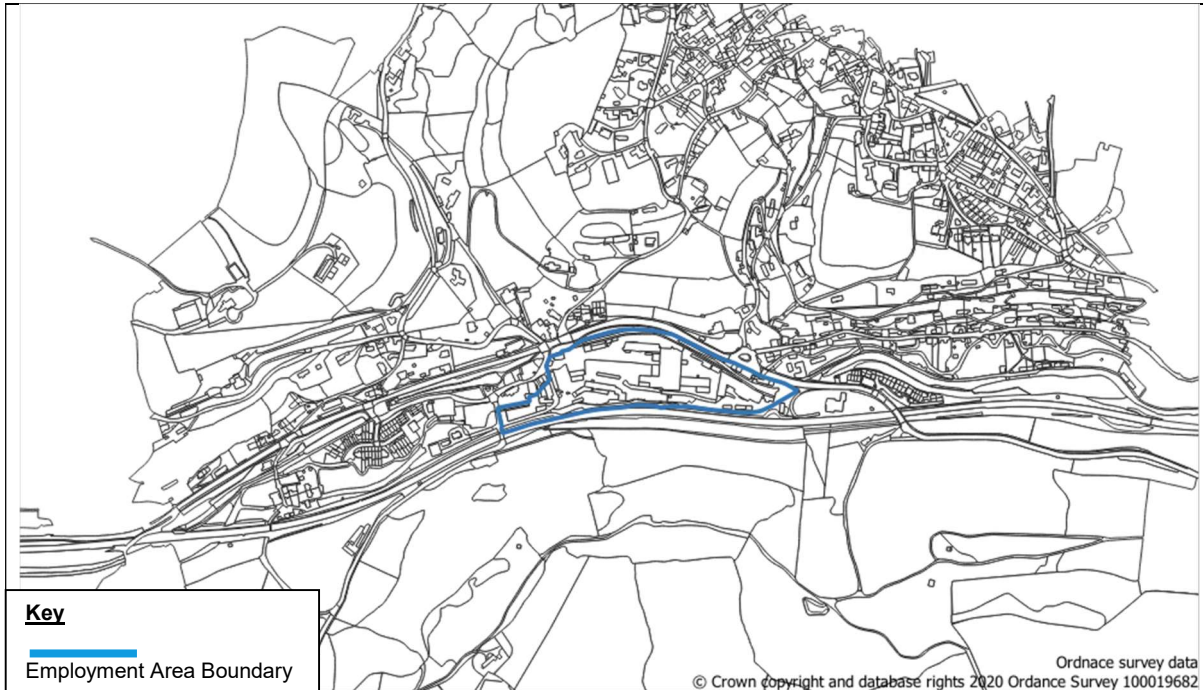
Ordnance survey data
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| | |
|--|---|
| Area Reference | Local Plan 2015, Policy EI1, Site EK6 |
| Name | Draycott / Middle Mill Industrial Estate, Cam |
| Description | Modern industrial estate, with accommodation for several large employers and expansion land in the south and east. |
| Occupier(s) | Multiple – Including Eco Board, JSW Precision Engineering, Kerry Foods, Kwik Fit |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8, Sui Generis |
| Size, ha | 21.94 |
| Building Age | Post 1960 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 8 |
| Distance to A-road, km | Off A4135 Draycott Road |
| Distance to Rail Station, km | 1 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | On bus route (Draycott Road) |
| Distance to Services, km | Petrol filling station and convenience retail adjacent |
| Car Parking | Good – Private parking available for all units |
| Constraints | In flood risk area Public footpaths pass through the area |
| Scoring | 62 |
| Opportunities for redevelopment/ expansion | In principle, 1.81 ha of undeveloped expansion land remains between main estate and Eco Board/ Sundeala facility in south, however it is assumed this land is undevelopable as it is bisected by the River Cam and in an area of high Flood Risk. Apart from minor infill options, all other land is in use. Strategic growth options for Cam/ Dursley are considered separately in main report, including options to develop land to the immediate east of the River Cam. |
| Other Information | - |

| | |
|-----------------|---|
| Recommendations | The primary employment area for Cam/Dursley and a key source of modern industrial units in Stroud District. Draycott/Middle Mill Industrial Area should therefore be protected for employment uses. |
|-----------------|---|

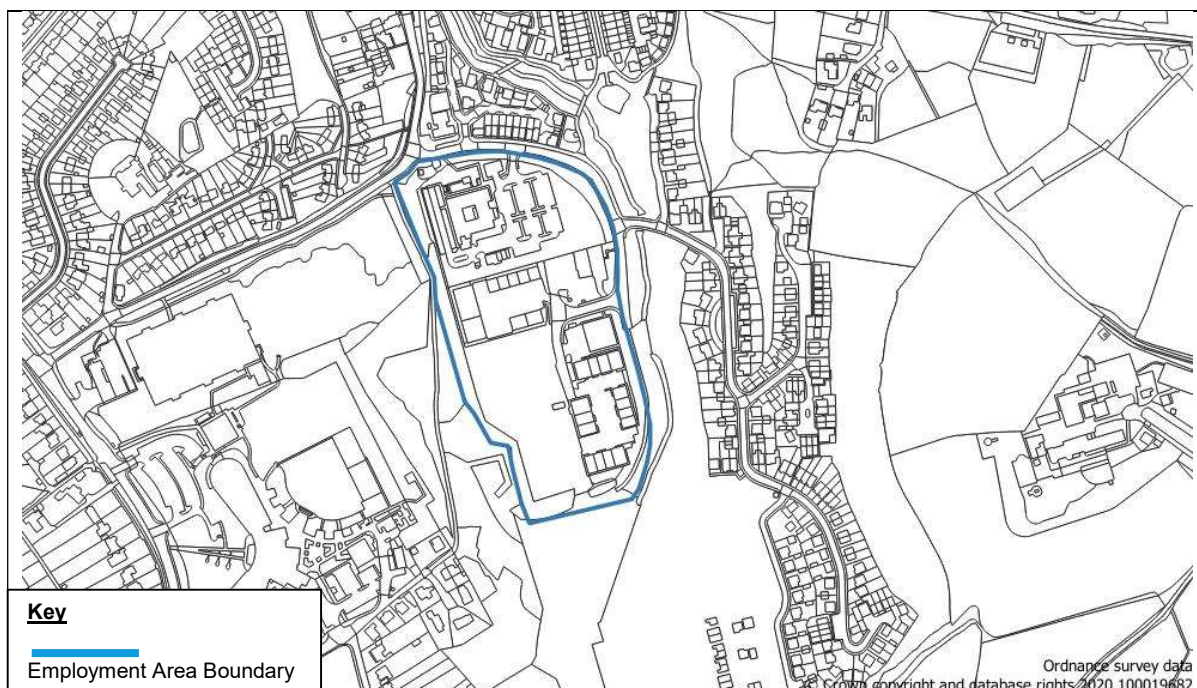



| | |
|--|--|
| Area Reference | Local Plan 2015, Policy EI1, Site EK7 |
| Name | Cam Mills, Everlands, Cam |
| Description | Mill complex, plus modern extensions, occupied by a large local employer |
| Occupier(s) | WSP Textiles |
| Prominence | Moderate |
| Current Use (Use Classes) | B2 |
| Size, ha | 2.25 |
| Building Age | (Primarily) pre-1945 |
| Building Quality | Good |
| Access Constraints | Accessed via relatively narrow, residential roads |
| Distance to M5 Motorway, km | 10 |
| Distance to A-road, km | 0.3 – A4135 High Street |
| Distance to Rail Station, km | 3 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | On bus route (Everlands) |
| Distance to Services, km | 0.3 – Cam Town Centre |
| Car Parking | Good – Extensive onsite parking available |
| Constraints | In flood risk area Surrounded by housing |
| Scoring | 44 |
| Opportunities for redevelopment/ expansion | Some undeveloped land in the east of the site (presently used for landscaping) which could permit the expansion of WSP, if required. All other land in use. Further expansion of the area is prevented by surrounding housing and recreation land. |
| Other Information | - |
| Recommendations | Facility for an established local employer. Cam Mills should therefore be protected for employment uses. |

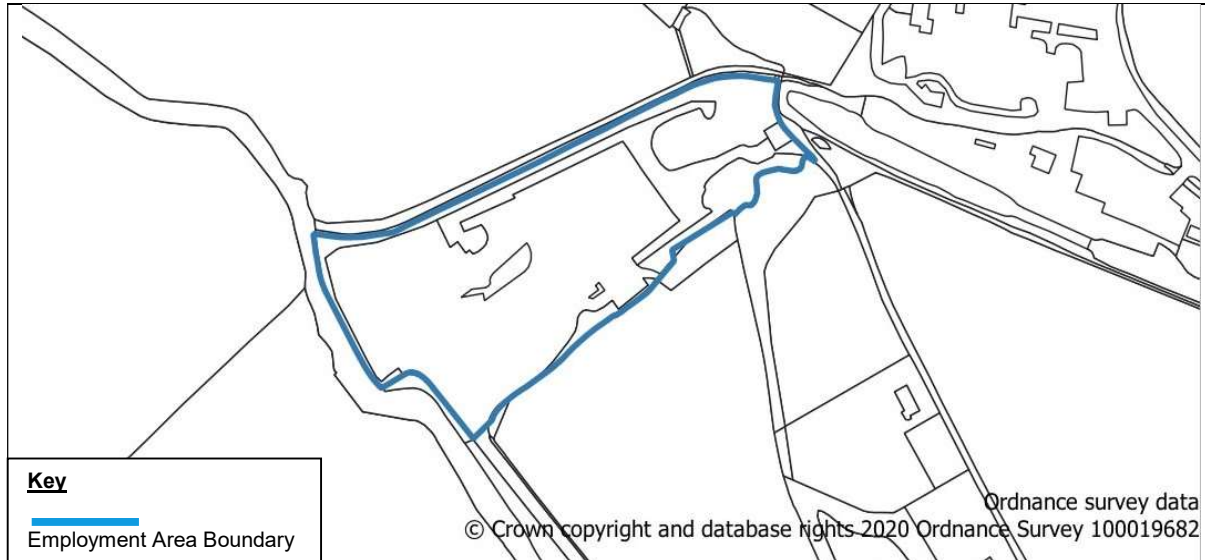


| | |
|------------------------------------|---|
| Area Reference | 2015 Local Plan E11, Site EK8 |
| Name | Chalford Industrial Estate, Chalford |
| Description | Established, moderate quality industrial estate comprising a range of older stone built properties, a sub-divided mill and areas of open storage, bounded by the River Frome and Thames/Severn Canal. |
| Occupier(s) | Multiple - Including Heber, Chalford Building Supplies |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 3.62 |
| Building Age | Mostly pre 1945 |
| Building Quality | Low to moderate |
| Access Constraints | Access off the A419 London Road is constrained by tight turns which limited HGV access. |
| Distance to M5 Motorway, km | 14 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 6 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2 – Bussage Local Shopping Area |
| Car Parking | Moderate - Private parking in front of most units, but high levels of informal parking evident in open storage areas. |
| Constraints | In Conservation Area. Some historic properties may be listed. In flood risk area Trees in the area |
| Scoring | 51 |

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| <p>Opportunities for redevelopment/ expansion</p> | <p>Most land and property appears to be in use, along with the open storage space. While the refurbishment of some properties may be possible, options for redevelopment will be constrained by the historic nature of many of the buildings (protected through Conservation Area, and possibly, Listed Building status).</p> <p>Opportunities for expansion are limited by adjacent waterways and the fact that the Industrial Estate sits in a narrow valley bottom.</p> |
| <p>Other Information</p> | <p>-</p> |
| <p>Recommendations</p> | <p>Although some property in the estate is of low quality, the area remains useful source of budget/moderate quality accommodation to occupiers in the Stroud Valleys. The estate is fully occupied, and most land and property is in use.</p> <p>The industrial estate should therefore be retained and protected as an established local employment area.</p> |

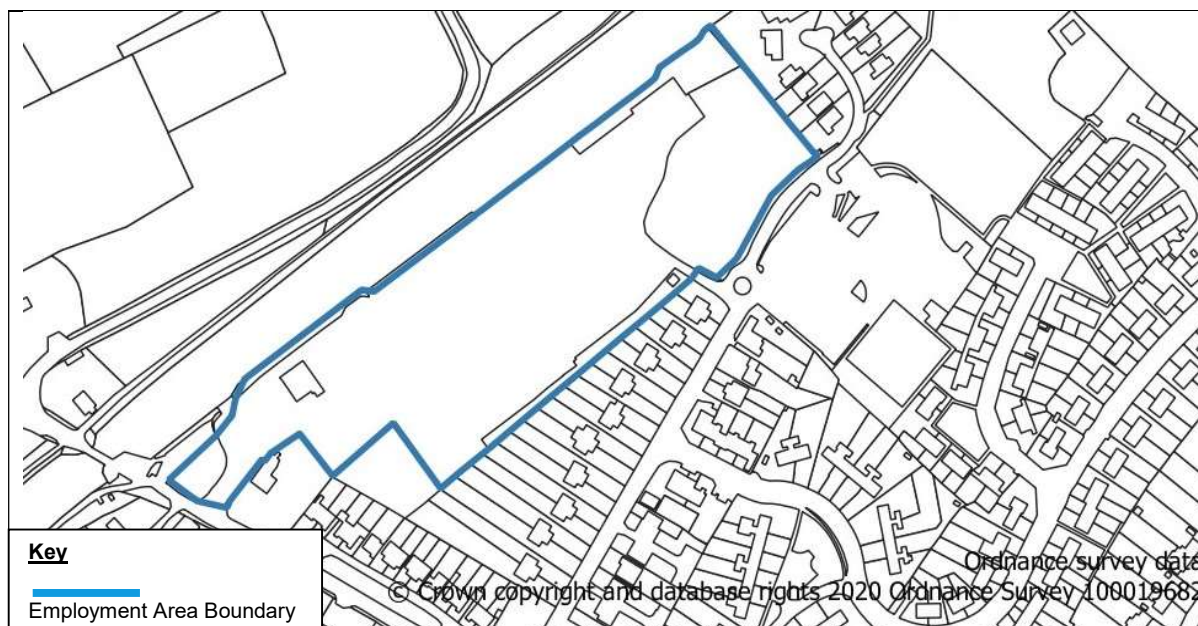


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|---|---|
| Key | |
|  | Employment Area Boundary |
| Area Reference | Local Plan 2015, Policy E11, Site EK9 |
| Name | Littlecombe Business Park, Dursley |
| Description | Modern industrial estate of light industrial units in a mostly new build residential area within Dursley |
| Occupier(s) | Multiple – Including Everhot |
| Prominence | Low – Behind housing |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 3.78 |
| Building Age | Modern |
| Building Quality | High |
| Access Constraints | Accessed through residential areas |
| Distance to M5 Motorway, km | 3.4 |
| Distance to A-road, km | 0.3 – A4135 Kingshill Road |
| Distance to Rail Station, km | 4 – Cam and Dursley Station |
| Distance to Existing Bus Route, km | 0.4 – A4135 Kingshill Road |
| Distance to Services, km | 1 – Dursley Town Centre |
| Car Parking | Modern units with appropriate car parking associated with them |
| Constraints | Partly in flood risk area Housing surrounding |
| Scoring | 69 |
| Opportunities for redevelopment/ expansion | Two phases of units have been delivered to date. Scheme owner St Modwen has developed all land under its ownership. Some 0.75 ha remains undeveloped in the south west of the site, all land under Stroud Council ownership. |
| Other Information | - |
| Recommendations | Modern industrial park, a key source of light industrial space in the west of the District. The Area should be protected in the Local Plan. If it has not already done so the Council should engage with St Modwen regarding development on the remaining land within the Area. The employment allocation includes Vale Community Hospital in the north of 1.43 ha. This should be excluded. |




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|------------------------------------|---|
| Key | |
| Employment Area Boundary | |
| Area Reference | 2015 Local Plan Policy EI1, Site EK10 |
| Name | Eastington Meadow Mill Industrial Estate, Eastington |
| Description | Small rural industrial estate, comprising a mix of mostly budget quality, former mill, industrial premises, fronted by greenfield land. |
| Occupier(s) | ARC Energy Resources appears to be primary, possibly exclusive occupier |
| Prominence | Poor |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 4.10 |
| Building Age | Mixed |
| Building Quality | Low to moderate |
| Access Constraints | None |
| Distance to M5 Motorway, km | 2 |
| Distance to A-road, km | 1 – (A419) |
| Distance to Rail Station, km | 4 – Stonehouse Station |
| Distance to Existing Bus Route, km | 0.3 – Spring Hill |
| Distance to Services, km | 4 – Stonehouse Town Centre |
| Car Parking | Good - Private parking available at most units |
| Constraints | In Conservation Area. In a key wildlife site In flood risk area Trees in the area |
| Scoring | 45 |

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| <p>Opportunities for redevelopment/ expansion</p> | <p>2.20 ha of undeveloped land fronting the estate – previously identified in the now superseded Local Plan as Site EA2: '<i>Meadow Mill, Eastington</i>'. In 2016, Industrial Sales Ltd received consent to develop three E(g)(iii)/B2 industrial buildings of 2,690 sqm in total on 1.49 ha in the north of the site (App. No. S.15/2089/OUT). This application was not progressed, however, with an application for discharge of Condition One (App. No. S.19/0975/DISCON) withdrawn in 2019. Thus, this consent has lapsed, and the land remains available for future development.</p> <p>The ARC Energy building provides future opportunities for refurbishment should it no longer meet the needs of the occupier. Elsewhere land and property appear in reasonable condition and well occupied. Further growth (beyond Site EA2) is constrained by surrounding areas of ecological value.</p> |
| <p>Other Information</p> | <p>-</p> |
| <p>Recommendations</p> | <p>Although some property in the estate is of low quality, the area provides accommodation for a sizable employer. The industrial estate should therefore be retained and protected as an established local employment area.</p> <p>Should ARC vacate, the premises is of sufficient quality to attract new occupiers, albeit likely micro and small employers seeking budget space rather than another large business.</p> |

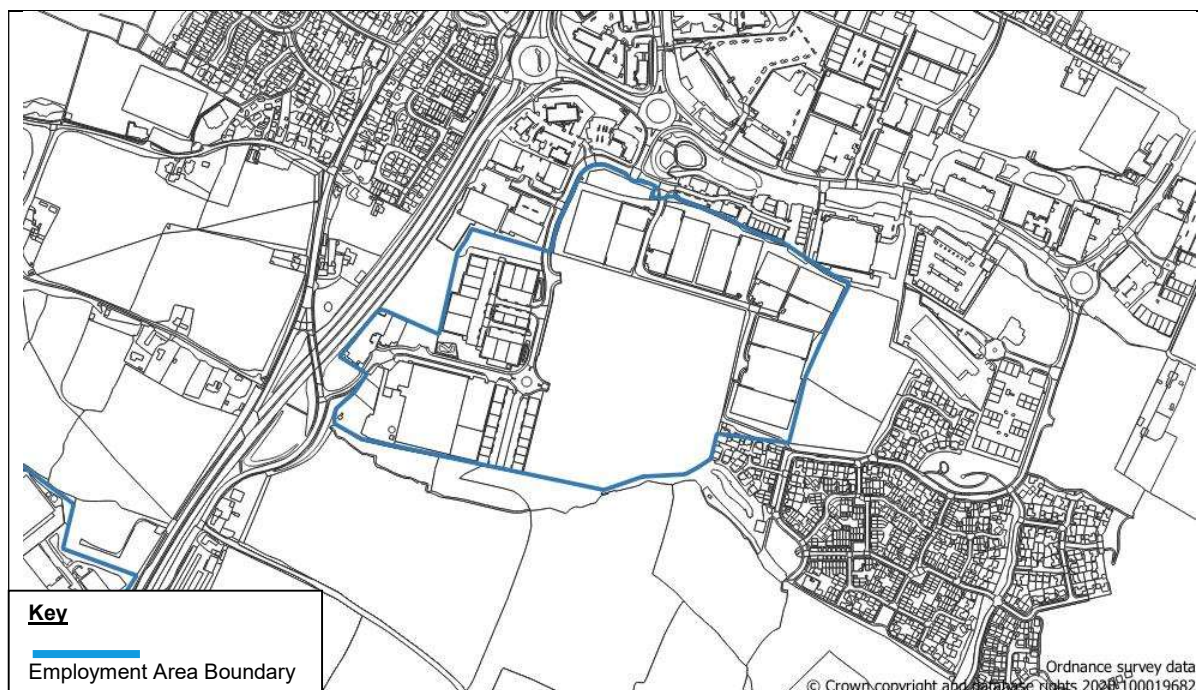



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|---|---|
| Area Reference | Local Plan 2015, Policy E11, Site EK11 |
| Name | Frampton Industrial Estate, Frampton-on-Severn |
| Description | Budget quality, canal side industrial estate in an edge of settlement location |
| Occupier(s) | Ever Fresh appears to be the sole occupier |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 2.89 |
| Building Age | Post 1960 |
| Building Quality | Moderate |
| Access Constraints | Narrow access off Bridge Road |
| Distance to M5 Motorway, km | 4 |
| Distance to A-road, km | 3 – A38 |
| Distance to Rail Station, km | 8 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Bridge Road) |
| Distance to Services, km | 0.6 – Frampton-on-Severn (limited) local shops (primarily off The Green) |
| Car Parking | Poor – Limited parking throughout the estate |
| Constraints | In flood risk area Nationally Important Wildlife Site to the west Housing to the north and east |
| Scoring | 38 |
| Opportunities for redevelopment/ expansion | Tightly defined, dense industrial area presenting no opportunities for significant change. Further expansion of the area is prevented by the surrounding canal and housing. |
| Other Information | - |

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| Recommendations | <p>Although the general quality of premises is low-moderate, the industrial estate remains in full use by a mid-sized local employer. It is also the only significant source of industrial accommodation in the rural north western area of Stroud District. Frampton Industrial Estate should therefore be protected for employment uses.</p> <p>Should Ever Fresh vacate, the premises is of sufficient quality to attract new occupiers, albeit likely micro and small employers seeking budget space rather than another large business.</p> <p>The area boundary includes land in the north east, an area of trees and grassland, which has Outline planning consent for housing (App. No. S.15/0707/OUT) and for which reserved matters planning consent is being sought (App. No. S.19/2212/REM). Assuming development is completed, this land some 0.60 ha, should be excluded from any future Employment Area allocation. Conversely, the boundary excludes a small area of land in the south east which is used for HGV parking, some 0.22 ha in size, and could be included in the area.</p> |
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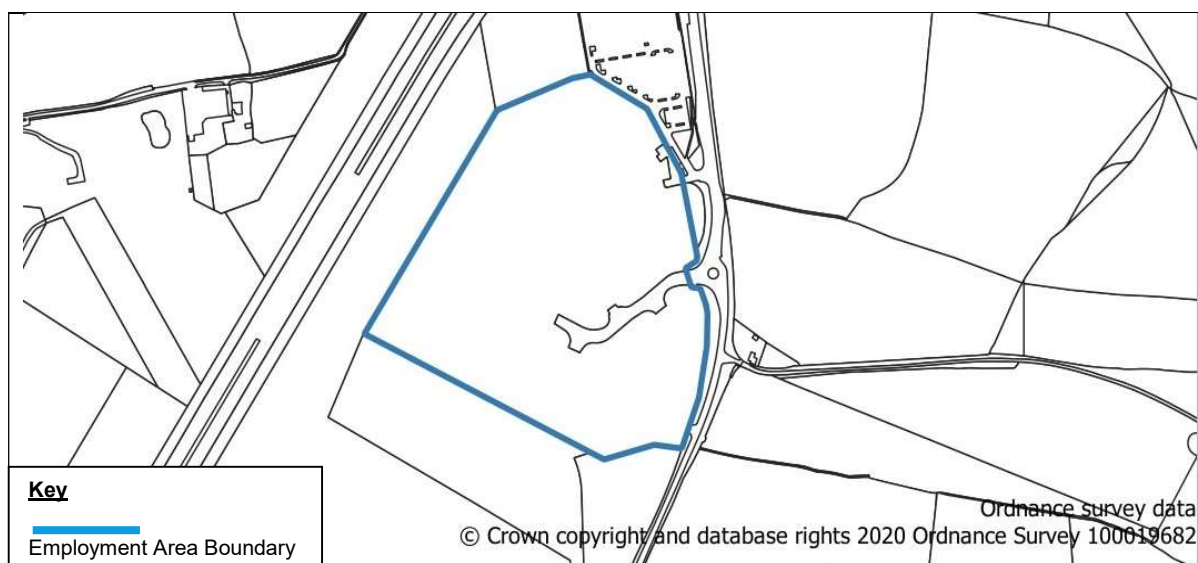


| Key | |
|--|--|
| Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy EI1, Site EK12 |
| Name | Hardwicke Quedgeley West |
| Description | High quality, modern logistics park on a main road location, close to Junction 12, M5 |
| Occupier(s) | Multiple – Including Downton and Slumberger. |
| Prominence | High |
| Current Use (Use Classes) | B2, B8 |
| Size, ha | 12.70 |
| Building Age | Modern |
| Building Quality | Good |
| Access Constraints | Accessed off dual carriageway |
| Distance to M5 Motorway, km | 1 |
| Distance to A-road, km | Off A38 |
| Distance to Rail Station, km | 7 – Stonehouse Station (similar distance to Gloucester Station) |
| Distance to Existing Bus Route, km | On bus route (A38) |
| Distance to Services, km | 0.1 – Petrol filling station, McDonalds, and convenience store off Cross Keys Roundabout. |
| Car Parking | Good – Extensive parking available at all units |
| Constraints | Trees in the area |
| Scoring | 74 |
| Opportunities for redevelopment/ expansion | Area is fully developed. Strategic growth options in the wider area are considered separately in the Main Report. |
| Other Information | - |
| Recommendations | This is a successful strategic logistics park, serving Stroud District, Gloucester and the wider county and accommodating several major employers. The area should therefore be protected for employment uses in the Local Plan. |

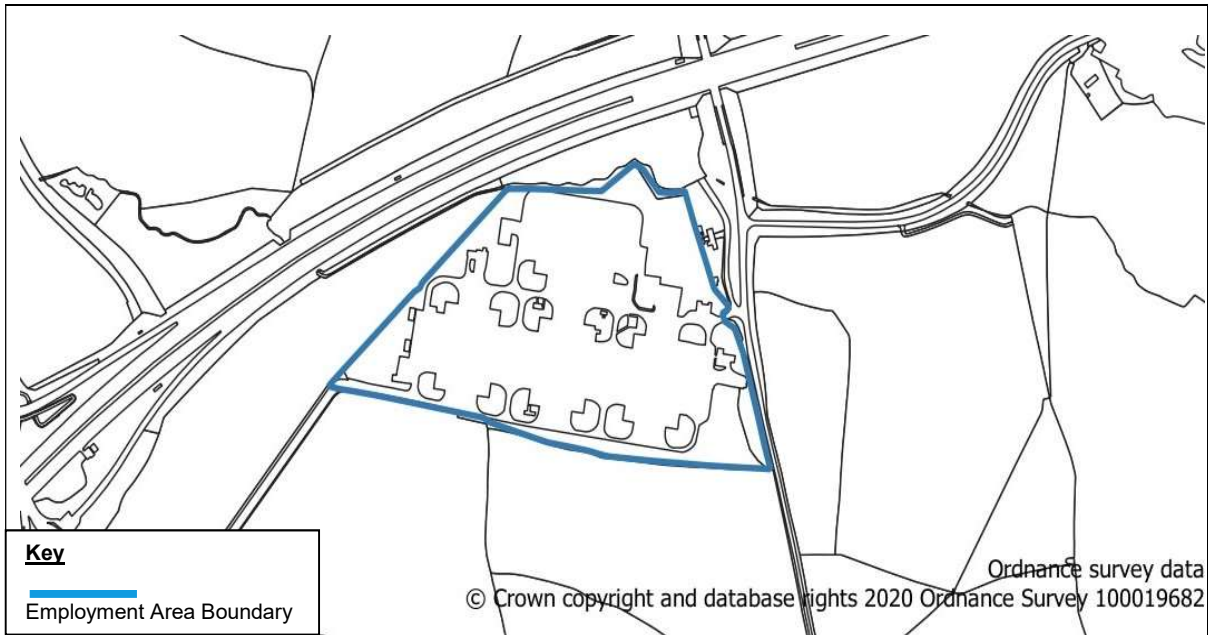


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| Key | |
|  Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy E11, Site EK13 |
| Name | Hardwicke Hunts Grove/Quadrant Distribution Centre |
| Description | Modern, low density business park, including substantial greenfield development land. Area has seen new build development over 2015-19, by developer St Modwen, comprising six modern units of 2,500-6,700 sqm (Gateway 12) |
| Occupier(s) | Multiple – Including SCI-MX Nutrition, Warwick Fabrics and Parcellforce |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 23.09 |
| Building Age | Modern |
| Building Quality | High |
| Access Constraints | - |
| Distance to M5 Motorway, km | 1.4 |
| Distance to A-road, km | 0.1 – A38 |
| Distance to Rail Station, km | 7.4 – Stonehouse Station (similar distance to Gloucester Station) |
| Distance to Existing Bus Route, km | 0.2 – A38 |
| Distance to Services, km | 0.7 – Petrol filling station, McDonalds and convenience store off Cross Keys Roundabout. |
| Car Parking | Good – Extensive parking available at all units |
| Constraints | Trees in the area |
| Scoring | 80 |
| Opportunities for redevelopment/expansion | <p>8.32 ha of land remains undeveloped in the centre of the Area. However, the land is now subject to an Outline Application for 160 dwellings (App. No. S.18/1947/OUT) by owner Hansteen. It is understood that this development will trigger requirements for large scale investment into Junction 12, M5.</p> <p>Generally, the emphasis for new development has now moved south to sites which more directly access M5 Junction 12 and the wider county market. Strategic site proposals are discussed in the Main Report.</p> |

| | |
|-------------------|--|
| Other Information | - |
| Recommendations | This is a successful business park, serving both Stroud District and Gloucester. It also one of the few sources of modern business units in the District. The Area has seen recent development of mid-sized B2/B8 units which developer St Modwen identify as being highly popular and achieving rents of £7.50/sqft (£80/sqm), with demand for further accommodation locally. The area should therefore be protected for employment uses in the Local Plan. |

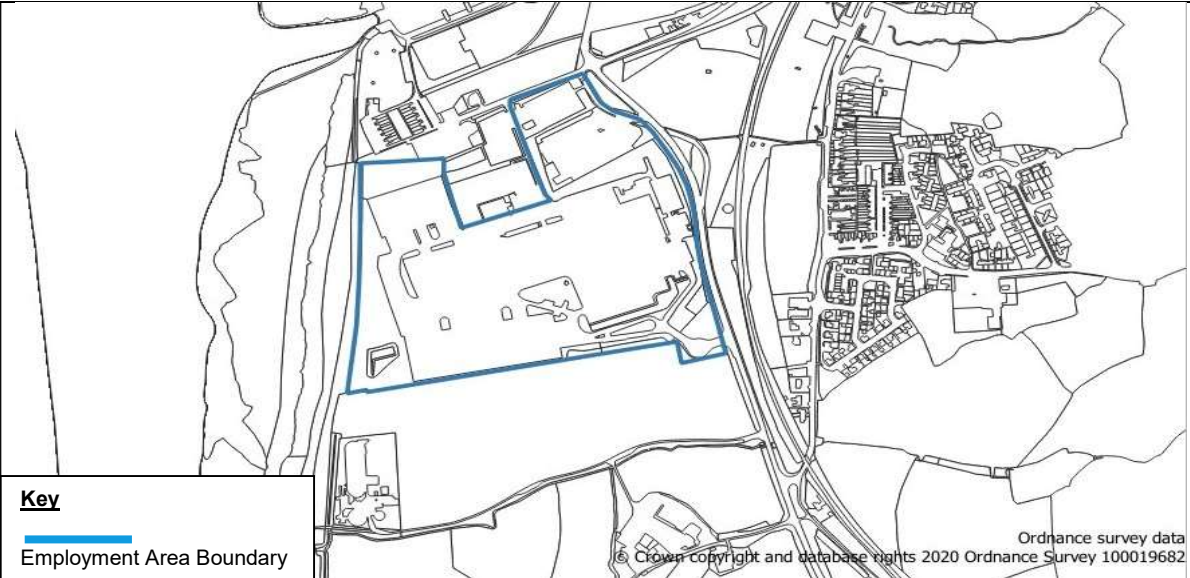


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|---|--|
| Area Reference | Local Plan 2015, Policy E11, Site EK14 |
| Name | Javelin Park, Haresfield |
| Description | Site of the Gloucestershire (Javelin Park) Energy from Waste Centre, plus associated infrastructure, adjacent to garden centre, off Junction 12, M5 |
| Occupier(s) | Energy from Waste Centre and visitor centre |
| Prominence | High |
| Current Use (Use Classes) | B2, B8 |
| Size, ha | 11.23 |
| Building Age | Modern |
| Building Quality | High |
| Access Constraints | None |
| Distance to M5 Motorway, km | 0.4 |
| Distance to A-road, km | 1.3 – A38 |
| Distance to Rail Station, km | 6.3 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Gloucester Road) |
| Distance to Services, km | 1.3 – Petrol filling station, McDonalds and convenience store off Cross Keys Roundabout (also Blooms Garden Centre on Gloucester Road) |
| Car Parking | Substantial car parking associated with the facility |
| Constraints | - |
| Scoring | 70 |
| Opportunities for redevelopment/expansion | Main facility now operational. 6.25 ha of undeveloped land north of the Energy from Waste facility is separately owned by Consi Investment. Consi have submitted a full planning application for five B1(c), B2, B8 units, in four buildings (App. No. S.19/2135/FUL). It is understood that this development will trigger requirements for large scale investment into Junction 12, M5. There are a range of strategic proposals in the surrounding area which are discussed in the Main Report. |
| Other Information | - |
| Recommendations | Active power generation facility plus further land where the owner is seeking to deliver E/B-Class units. Protect in the Local Plan. |

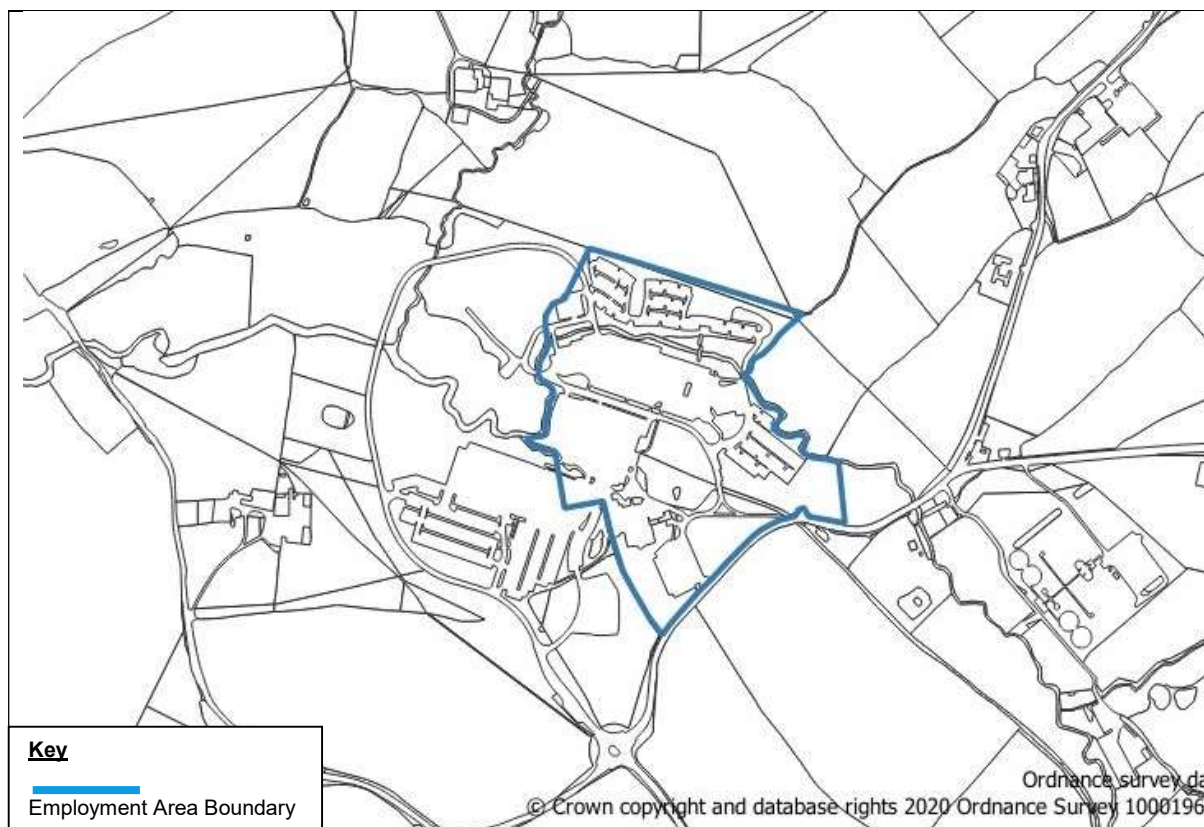


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|------------------------------------|---|
| Area Reference | Local Plan 2015, Policy EI1, Site EK15 |
| Name | Haresfield Quedgeley Trading Estate East |
| Description | Low quality former MoD complex, now surrounded by a modern, new build industrial/warehouse park, St Modwen Park, with three units completed to date, close to Junction 12, M5 |
| Occupier(s) | Multiple – Including H and M Distribution. One new unit let to Aday |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 9.63 (just the Existing Trading Estate). 22.63 (with St Modwen Park, SA4a Quedgeley East) |
| Building Age | Pre 1945 plus new build units under construction |
| Building Quality | Low (existing), High (new) |
| Access Constraints | - |
| Distance to M5 Motorway, km | 0.7 |
| Distance to A-road, km | 1.3 – A38 |
| Distance to Rail Station, km | 6.5 – Stonehouse Station |
| Distance to Existing Bus Route, km | 0.3 – Gloucester Road |
| Distance to Services, km | 1.6 – Petrol filling station, McDonalds and convenience store off Cross Keys Roundabout (also Blooms Garden Centre on Gloucester Road) |
| Car Parking | Mixed – Good parking on new units, limited on existing trade park |
| Constraints | Trees in the area |
| Scoring | 82 |

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| Opportunities for redevelopment/ expansion | <p>St Modwen Park delivery timetable is:</p> <ul style="list-style-type: none"> • 2018 Consent secured for 86,000 sqm of new B2/B8 floorspace, including the redevelopment of the existing Trading Estate • 2019 Three units delivered of 4,181-6,782 sqm. One let, one under offer. • 2021 Four more units to be delivered west of the access road. 16,700 sqm total. • 2022 delivery of a large unit of 10,777 sqm plus another of 5,574 sqm, east of the access road • 2023-24 Redevelopment of the trade park for 28,000 sqm of new space. |
| Other Information | - |
| Recommendations | Area being developed/redeveloped for a new modern industrial and logistics park which is already attracting occupiers. The Area should be protected in the Local Plan. |

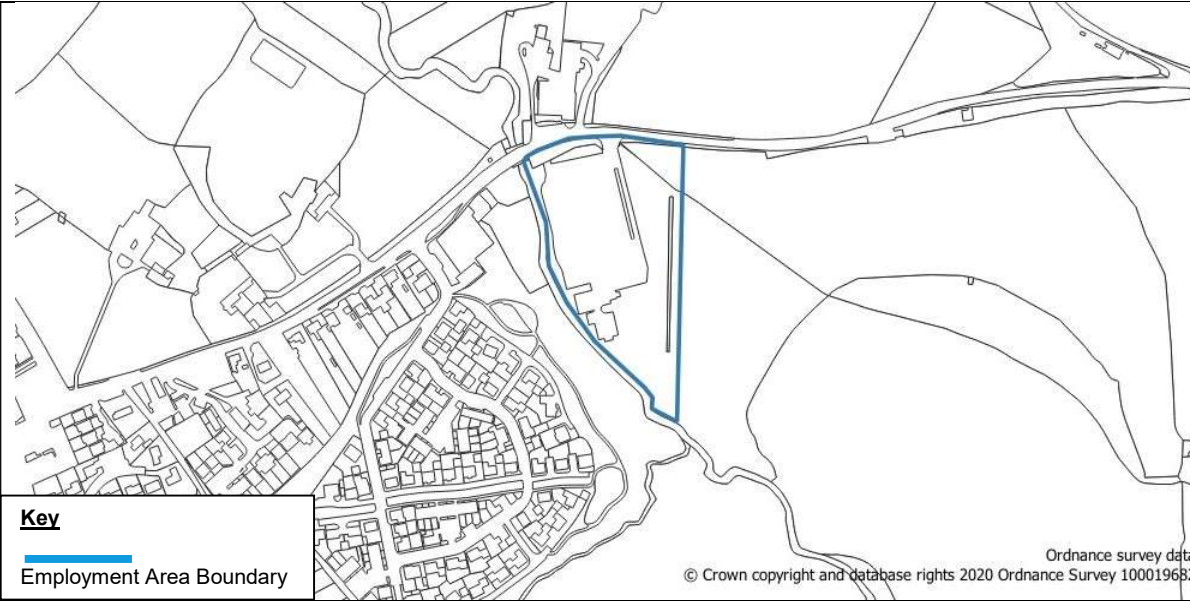


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|---|---|
| Key Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy E11, Site EK16 |
| Name | Severn Distribution Park, Hinton |
| Description | Secure distribution park south of Sharpness Docks |
| Occupier(s) | Multiple – Including Howard Tenens Logistics, RDA Bulk Packaging, Protos Packaging |
| Prominence | Low |
| Current Use (Use Classes) | B2, B8 |
| Size, ha | 16.35 (present developed area) |
| Building Age | Mostly Modern |
| Building Quality | Primarily High |
| Access Constraints | - |
| Distance to M5 Motorway, km | 16 |
| Distance to A-road, km | 5 – A38 |
| Distance to Rail Station, km | 12 – Cam and Dursley Station |
| Distance to Existing Bus Route, km | 2 – Station Road |
| Distance to Services, km | 3 – Berkeley local shops (Marybrook Street/Market Place) |
| Car Parking | High – Good parking provision across the area |
| Constraints | Partly in flood risk area. Adjacent key and Nationally Important Wildlife sites Trees in the area |
| Scoring | 55 |
| Opportunities for redevelopment/ expansion | An expansion site of 9.8 ha is proposed in the emerging Local Plan on land to the south, on land owned by Howard Tenens – SA5a: South of Severn Distribution Park. This would meet the needs of new and growing businesses who wish to operate from the Distribution Park. |
| Other Information | - |
| Recommendations | Severn Distribution Park has established itself as a significant sub-regional warehousing and distribution centre. The Distribution Park owner has aspirations to expand the Park beyond the present boundary. Both the existing Park, and its expansion opportunity should be protected in the Local Plan. |



| | |
|---|--|
| Area Reference | Local Plan 2015, Policy E11, Site EK17 |
| Name | Renishaw New Mills, Kingswood |
| Description | Substantial, modern headquarters office/manufacturing facility for a major employer. |
| Occupier(s) | Renishaw |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (i), B2 |
| Size, ha | 8.91 |
| Building Age | Modern |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 6 |
| Distance to A-road, km | 6.5 – A38 |
| Distance to Rail Station, km | 12 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | 0.2 – Charfield Road |
| Distance to Services, km | 1.5 – Kingswood local shops (High Street) |
| Car Parking | High – Extensive onsite parking available |
| Constraints | In flood risk area Trees in the area |
| Scoring | 59 |
| Opportunities for redevelopment/expansion | There is an identified 9 ha expansion site, PS47: Renishaw New Mills on the west side of the existing area, which is being progressed through the Local Plan process. In discussions, Renishaw have identified a need for this land to develop new manufacturing facilities on, and to accommodate other businesses. This is discussed further in the Main Report. Renishaw seeking consent for a 33,131 sqm new research facility and 845 car parking spaces on 3.8 ha of greenfield land to the north west (App. No. S.18/2368/FUL). |

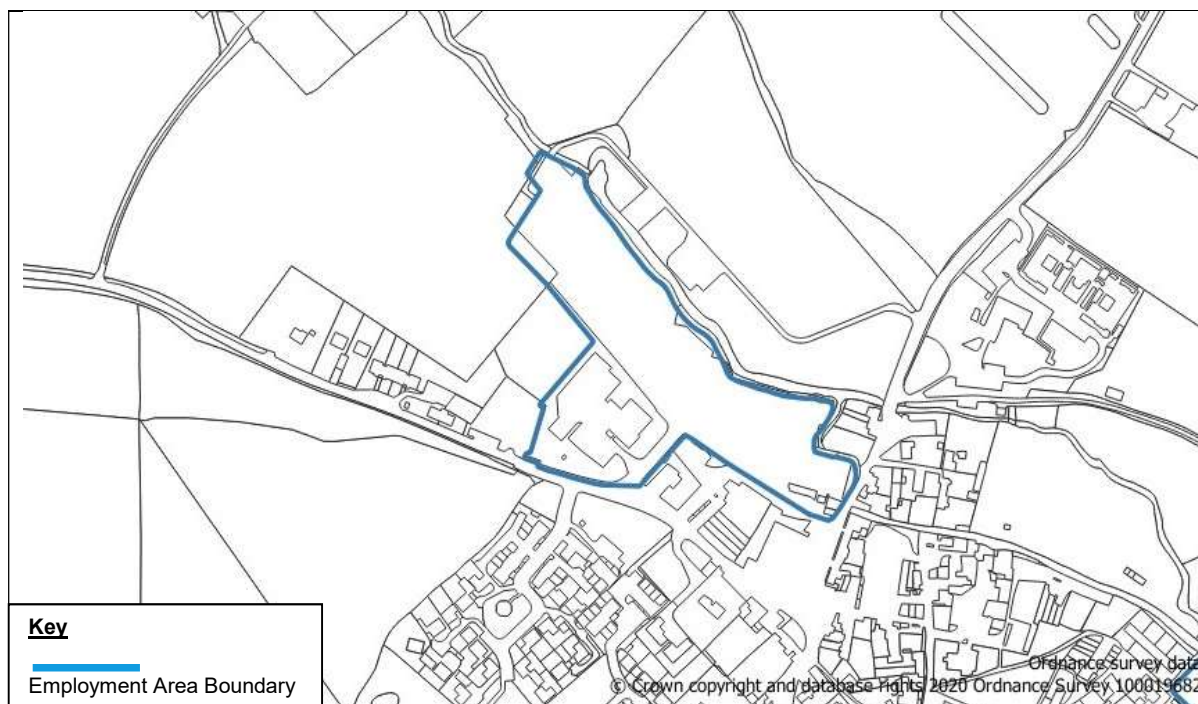
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| Other Information | - |
| Recommendations | <p>HQ facility for a major local employer, with growth plans. Individual growth plans will need to be considered on their own merits. It is noted that the current extension to Renishaw, for which consent is being sought appears to represent organic growth of existing operations. It is not suggested that the development will generate significant additional employment on the site.</p> <p>The area should be protected for employment uses in the Local Plan.</p> <p>It is noted the current Local Plan boundary excludes Renishaw facilities in the south and would exclude them in the north west, if proposals are consented. The boundary should be re-drawn to reflect this.</p> |



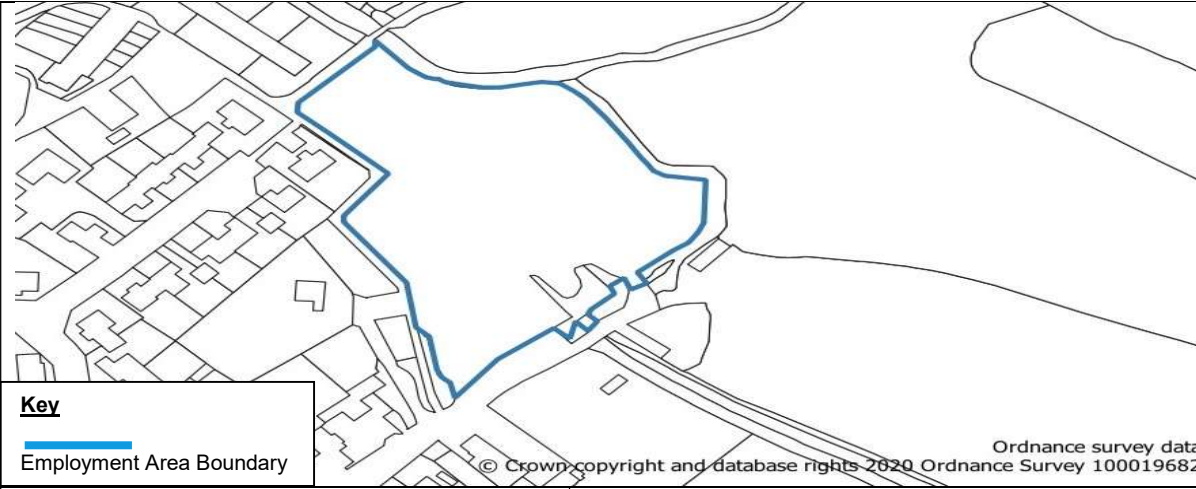
Key
Employment Area Boundary

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| Area Reference | Local Plan 2015, Policy E11, EK18 |
| Name | Renishaw Charfield Works, Kingswood |
| Description | Solus, modern factory for Renishaw in an edge of settlement location |
| Occupier(s) | Renishaw |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (i), B2, B8 |
| Size, ha | 1.42 |
| Building Age | Modern |
| Building Quality | High |
| Access Constraints | - |
| Distance to M5 Motorway, km | 4.6 |
| Distance to A-road, km | 4.8 – A38 |
| Distance to Rail Station, km | 14.0 – Cam/Dursley Station |
| Distance to Existing Bus Route, km | 0.3 – Railway Tavern, Wotton Road |
| Distance to Services, km | 0.5 – Modest services in Charfield |
| Car Parking | Good – Substantial parking both in front of, and to the rear of the building |
| Constraints | In flood risk area Trees in the area |
| Scoring | 50 |
| Opportunities for redevelopment/ expansion | There is 0.66 ha of undeveloped expansion land in the east of the area, under Renishaw’s ownership. However, the linear shape of the land would limit what could be developed here and any development would be for the exclusive use of Renishaw. Expansion to the west is prevented by the Little Avon River and woodland. Expansion to the east would be possible but would require the loss of farmland and the expansion of the Charfield settlement area into the countryside. |
| Other Information | - |
| Recommendations | Active, modern facility for a key local employer. Protect in the Local Plan. |



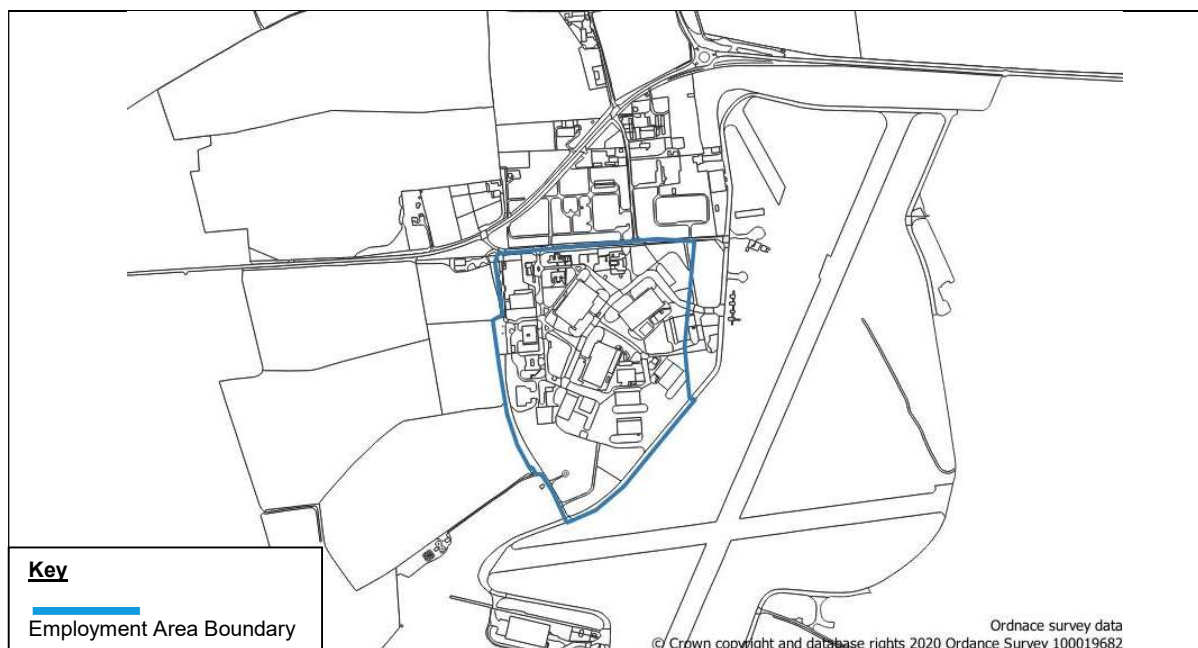
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| Area Reference | Local Plan 2015, Policy EI1, Site EK19 |
| Name | Abbey Mill Industrial Area, Kingswood |
| Description | Small, moderate quality, edge of settlement industrial estate |
| Occupier(s) | Multiple – including SWA, Manor Printing Services |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 2.33 |
| Building Age | Primarily post 1960 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 7 |
| Distance to A-road, km | 7 – A4135 Whiteway (similar distance to A38) |
| Distance to Rail Station, km | 12 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | On bus route (Charfield Road) |
| Distance to Services, km | 0.1 – Kingswood local shops (High Street) |
| Car Parking | High – Reasonable parking available for all units. |
| Constraints | Partly in Conservation Area Housing adjacent Trees in the area |
| Scoring | 50 |
| Opportunities for redevelopment/ expansion | Open land within the estate is in use for open storage and HGV parking. Further expansion of the industrial estate would not be possible without the loss of some greenfield agricultural land. Would also require development outside of the present Kingswood settlement boundary. |
| Other Information | - |
| Recommendations | A successful local industrial estate which has seen some recent development. Abbey Mill Industrial Estate should be protected for employment uses. |




Key
Employment Area Boundary

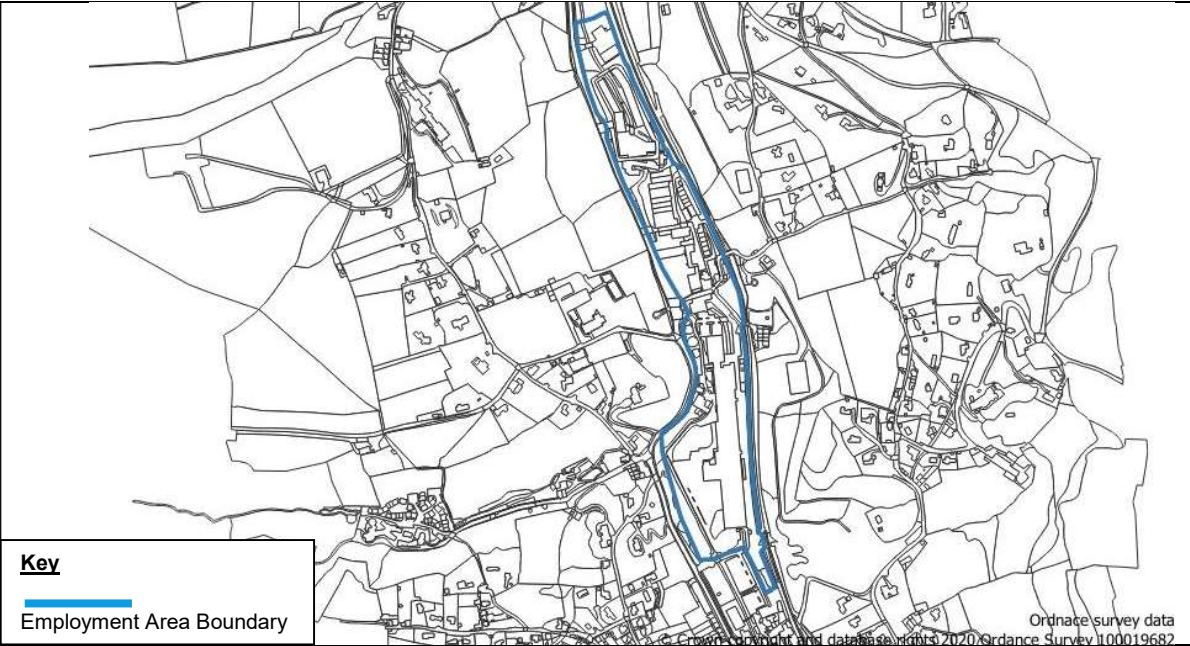
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| Area Reference | Local Plan 2015, Policy E11, EK20 |
| Name | Kingswood Orchestra Works |
| Description | Small, edge of settlement industrial site, accessed via narrow residential roads. |
| Occupier(s) | DCL Print – Although this company went into administration in July 2020 |
| Prominence | Poor |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 0.73 |
| Building Age | Pre 1960 |
| Building Quality | Poor-Moderate |
| Access Constraints | Access via narrow residential road, not suited for HGV traffic |
| Distance to M5 Motorway, km | 7.3 |
| Distance to A-road, km | 7.3 – A4135 Whiteway (similar distance to A38) |
| Distance to Rail Station, km | 12 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | 0.2 – Bramley Close |
| Distance to Services, km | 0.2 – Kingswood local shops (High Street) |
| Car Parking | Moderate – Dense site, limited parking |
| Constraints | In flood risk area Housing adjacent Trees in the area |
| Scoring | 30 |
| Opportunities for redevelopment/ expansion | Area fully developed. Further expansion of the industrial estate would not be possible without the loss of some greenfield agricultural land. Would also require development outside of the present Kingswood settlement boundary. |
| Other Information | - |
| Recommendations | Small, moderate quality area, with constrained access and in a mostly residential area. The current business occupier is in administration and it remains unclear whether it will continue to trade here, as the existing business or a reformed company, or whether the property will be put on the market. Assuming the site is still occupied by businesses, then protect in the Local Plan. If this is not the case then the location is of limited value to local businesses, particularly given its constrained access, and could be considered for other uses. |



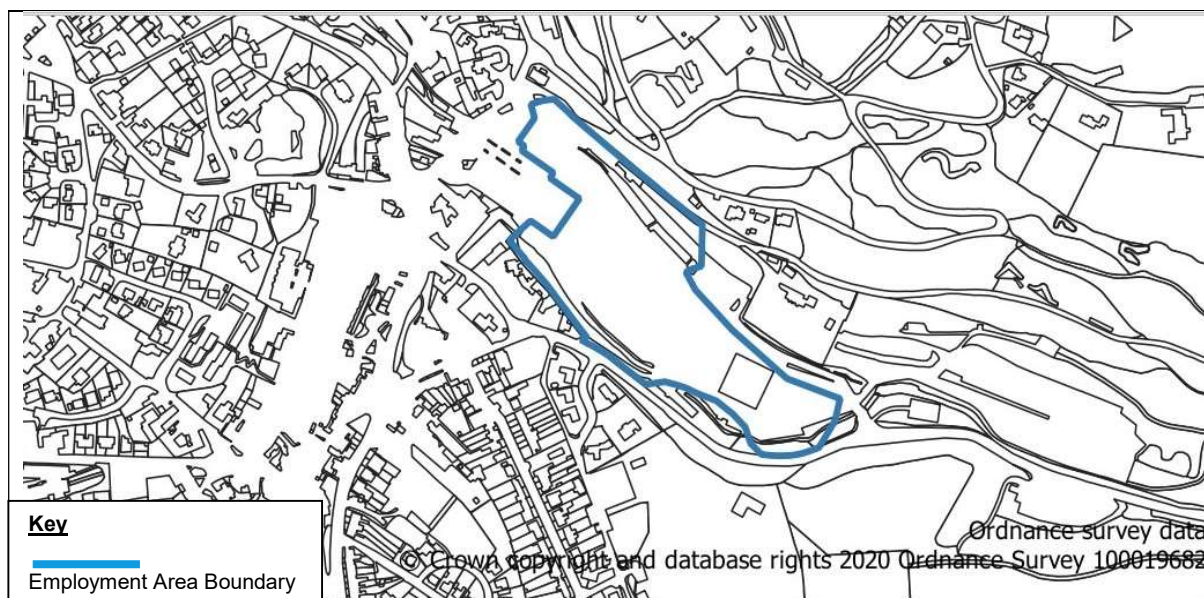
| Key  Employment Area Boundary | |
|--|---|
| Area Reference | Local Plan 2015, Policy EI1, Site EK21 |
| Name | Aston Down, Minchinhampton |
| Description | Former airfield properties, converted to provide budget quality employment premises in a rural area. |
| Occupier(s) | Multiple – Including Avon Scientific, BDP Imports |
| Prominence | Low |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 22.04 |
| Building Age | (Partly) Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 16 |
| Distance to A-road, km | 0.6 – A419 Cowcombe Hill |
| Distance to Rail Station, km | 8 – Stroud Station |
| Distance to Existing Bus Route, km | 0.1 – Cirencester Road |
| Distance to Services, km | 4 – Bussage local shops (Tanglewood Way) |
| Car Parking | Good– Extensive onsite parking available |
| Constraints | <p>In the Cotswold AONB Various sites of ecological importance surrounding Trees in the area</p> <p>In a decision on planning appeals by Leda Properties, Leda Properties Pension Fund and Squirrel Storage (Appeal. Nos. APP/C1625/A/07/2055526, APP/F1610/A/07/2055089, APP/C1625/C/08/2083828, APP/C1625/C/08/2085829, APP/F1610/C/08/2089015) it was broadly determined that re-use of the existing buildings at Aston Down was acceptable in the AONB but new build development or significant open storage was not, this was also due to traffic impacts on the A419.</p> |
| Scoring | 70 |

| | |
|---|--|
| <p>Opportunities for redevelopment/ expansion</p> | <p>The estate is of a low density and offers several infill opportunity sites. The owner Leda Properties has now submitted a hybrid planning application (App. No. S.20/0716/FUL) develop most of these plots:</p> <ul style="list-style-type: none"> • Zone A, north of Area (Outline consent sought) – 1.88 ha, Proposed for one unit of 466 sqm each and two of 696 sqm. 2,507 sqm total • Zone B, north east of Area (Full consent sought) – 2.65 ha, Proposed for six-ten E(g)/B2/B8 units of 240-4,644 sqm. 7,004 sqm total • Zone C, south east of Area (Full consent sought) – 0.52 ha, Proposed for four B2/B8 units of 465 sqm each. 1,860 sqm total • Zone D, south east of hangers (Outline consent sought) –0.76 ha, Proposed for two B2/B8 units of 930 sqm each. 1,860 sqm total • Zone E, south west of the hangers. New car parking proposed on 0.04 ha (Outline consent sought). <p>Overall, 13,231 sqm proposed on 5.15 ha (3.38 ha within Stroud District, the rest in Cotswold District).</p> <p>There is another 3.50 ha of undeveloped land south of the main hangers, within the allocated Area. The Area owner is also proposing land to the north of the existing allocation, outside of the secure Employment Area for E/B-Class uses (See Employment Site: Land Adjoining Aston Down)</p> |
| <p>Other Information</p> | <p>East of the site is within the Cotswold local authority area.</p> |
| <p>Recommendations</p> | <p>Aston Down is a significant employment area within the Stroud Valleys, with an owner who has aspirations for further growth and investment. It is not clear if any growth is permitted here, however the current planning application would intensify use in the existing Area, without encroaching on the surrounding Countryside. This would have lower impacts than the external expansion of the Area. Generally, the existing estate is sufficiently established to warrant protection as an Employment Area for E(g) B2, B8 employment uses in the development plan.</p> |

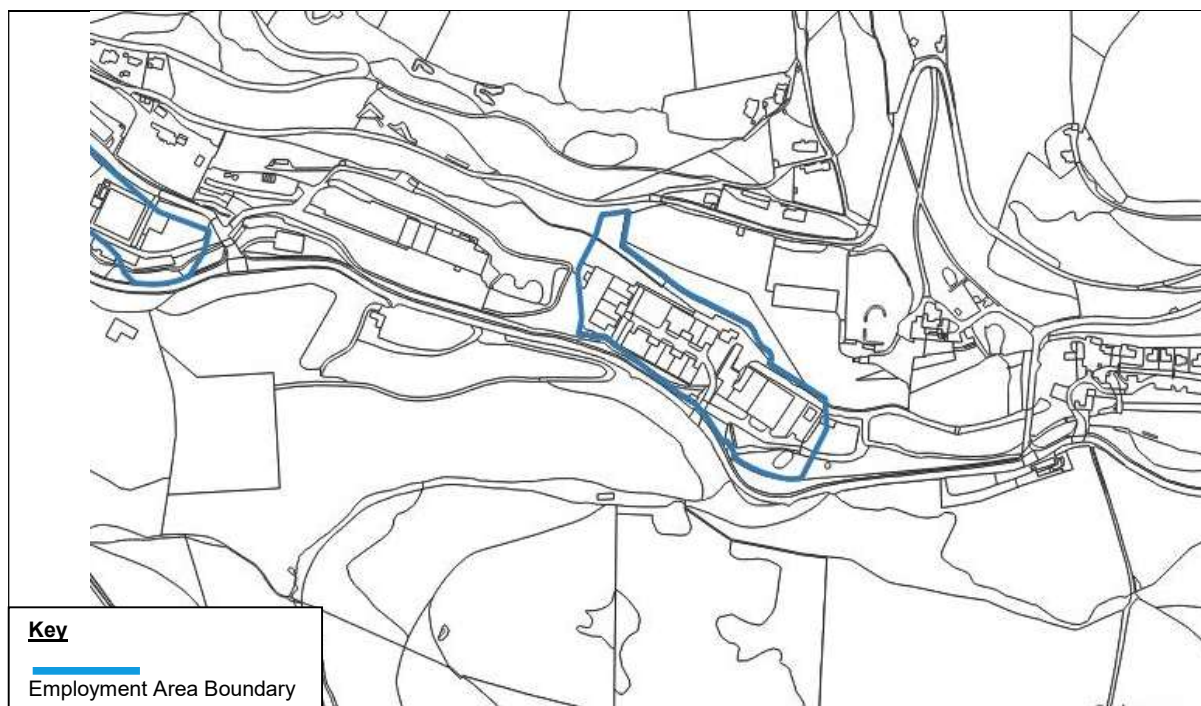


| Area Reference | Local Plan 2015, Policy E11 Site EK22 |
|--|--|
| Name | Inchbrook Industrial Estate, Nailsworth |
| Description | Substantial, linear employment area comprising modern facilities for a major local employer, subdivided mill complexes and several budget quality metal-framed units. Units in the north are in trade use. |
| Occupier(s) | Multiple – Including Renishaw |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 8.64 |
| Building Age | Mostly pre-1945 |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10.7 |
| Distance to A-road, km | Fronts the A46 Bristol Road |
| Distance to Rail Station, km | 4.2 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 2.3 – Nailsworth Town Centre |
| Car Parking | Moderate –Parking available for most units (shared parking for some) |
| Constraints | Flood risk area In Conservation Area Includes key wildlife sites Trees in the area |
| Scoring | 60 |
| Opportunities for redevelopment/ expansion | Dense employment area, all land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Some of the mill properties may provide future opportunities for refurbishment. |
| Other Information | - |

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| Recommendations | Inchbrook Industrial Estate includes premises for a major local employer (Renishaw) while the smaller, budget accommodation to the north has become dominated by trade uses who take advantage of the estate's prominent position on the A46. In this way the estate makes a significant contribution to the local economy and should be protected for these uses in the Local Plan. |
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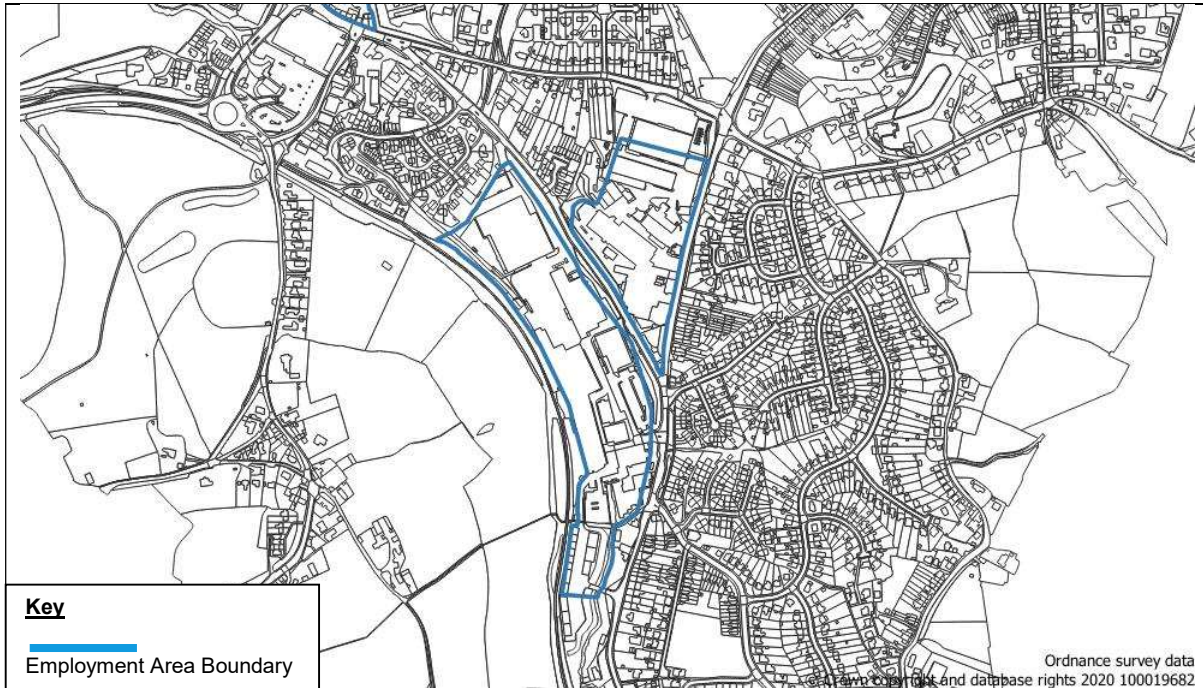


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| Area Reference | Local Plan 2015, Policy EI1, Site EK23 |
| Name | Nailsworth Mill Industrial Estate, Nailsworth |
| Description | Good quality, established industrial estate, comprising stone built units in a valley bottom location |
| Occupier(s) | Multiple – Including Read for Good, Fluid Transfer |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 3.31 |
| Building Age | Primarily modern |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 12 |
| Distance to A-road, km | 0.1 – A46 Bridge Street |
| Distance to Rail Station, km | 6 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (George Street) |
| Distance to Services, km | Foodstore and other Nailsworth Town Centre shops adjacent. |
| Car Parking | Good – Private parking available at most units |
| Constraints | In flood risk area Partly in Conservation Area Trees in the area Includes a small recreation site Some historic properties may be listed |
| Scoring | 59 |
| Opportunities for redevelopment/ expansion | Dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. |
| Other Information | - |
| Recommendations | Successful, modern industrial estate centrally located in Nailsworth. Nailsworth Mill Industrial Estate should be protected for employment uses. |



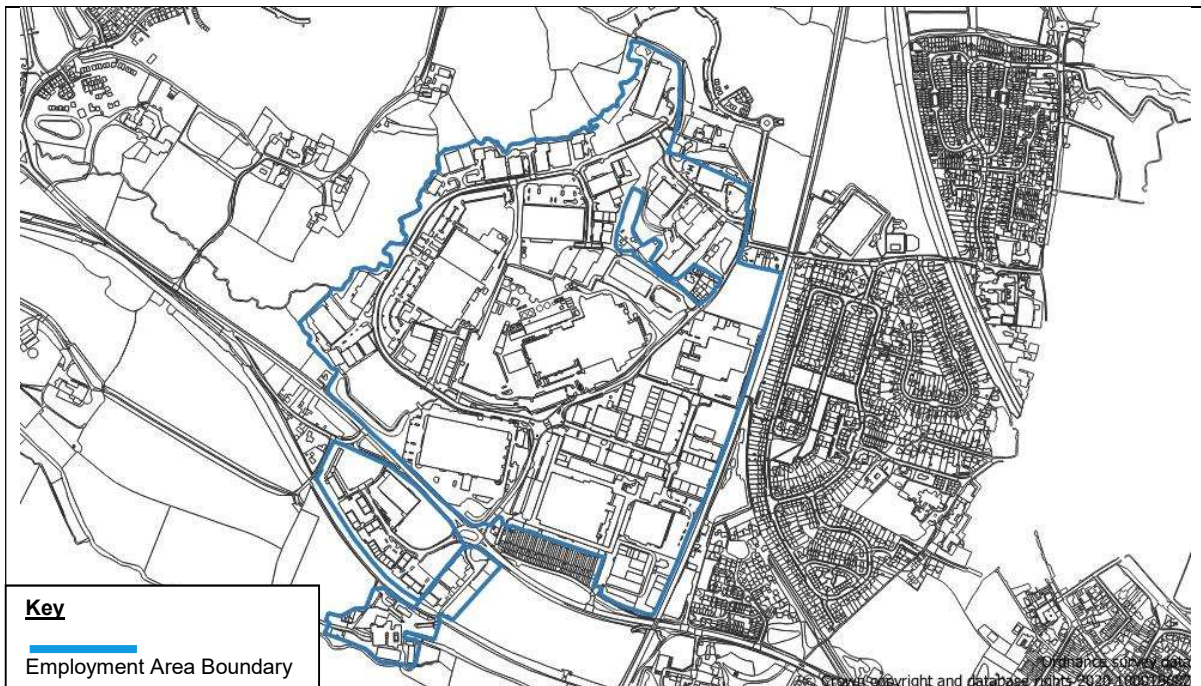
Key
 Employment Area Boundary

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| Area Reference | Local Plan 2015, Policy E11, Site EK24 |
| Name | Spring Mill Industrial Estate, Nailsworth |
| Description | Good quality, established industrial estate, comprising stone built units in a valley bottom location. Includes an ongoing mill refurbishment (Holcombe Mill). |
| Occupier(s) | Multiple – Including the Lindstrom |
| Prominence | Low |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 2.37 |
| Building Age | Various |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 13 |
| Distance to A-road, km | 1– A46 Bridge Street |
| Distance to Rail Station, km | 7 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Avening Road) |
| Distance to Services, km | 1 – Foodstore and other Nailsworth Town Centre shops (also close to Nailsworth Garden Centre) |
| Car Parking | Good – Private parking available at most units |
| Constraints | In flood risk area In Conservation Area Trees in the area Some historic properties may be listed |
| Scoring | 55 |
| Opportunities for redevelopment/ expansion | Small, dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Refurbishment of the existing mill properties has taken place/is taking place. |
| Other Information | - |
| Recommendations | Small but successful industrial estate serving the Stroud Valleys. Spring Mill Industrial Estate should be protected for employment uses in the Local Plan. |



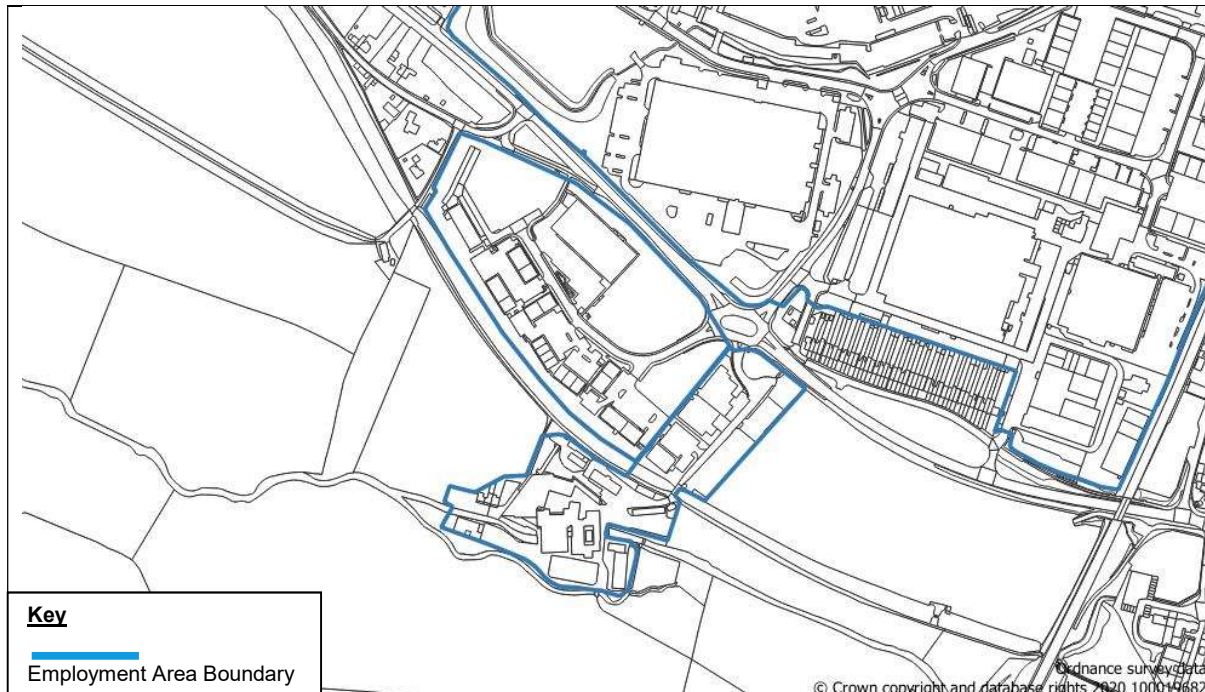
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|---|---|
| Area Reference | Local Plan 2015, Policy E11, Site EK25 |
| Name | Rodborough Bath Road Industrial Estate |
| Description | Substantial employment area, including a listed mill complex, terraced industrial units and accommodation for a major occupier. An Aldi foodstore has been developed on the main road frontage. |
| Occupier(s) | Multiple – Including RPC, Stroud Auction Rooms, Chinnick Theatre Services. Aldi foodstore |
| Prominence | High |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 6.40 |
| Building Age | Various mostly pre 1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 7.5 |
| Distance to A-road, km | Fronts A46 Dudbridge Road |
| Distance to Rail Station, km | 2.5 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Dudbridge Road) |
| Distance to Services, km | Foodstore on site |
| Car Parking | Moderate – Private parking available at some units |
| Constraints | In flood risk area In a Conservation Area Includes listed buildings Trees in the area |
| Scoring | 70 |
| Opportunities for redevelopment/ expansion | The development of Aldi appears to have taken up the main redevelopment opportunity here. Other land and property appears well used. Surrounding uses prevent further expansion. |
| Other Information | - |


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|-----------------|---|
| Recommendations | <p>The bulk of this area appears to function well, with some investment in refurbishing units. These properties should therefore be protected for employment uses in the Local Plan.</p> <p>An employment allocation could exclude the Aldi foodstore, 0.90 ha.</p> |
|-----------------|---|



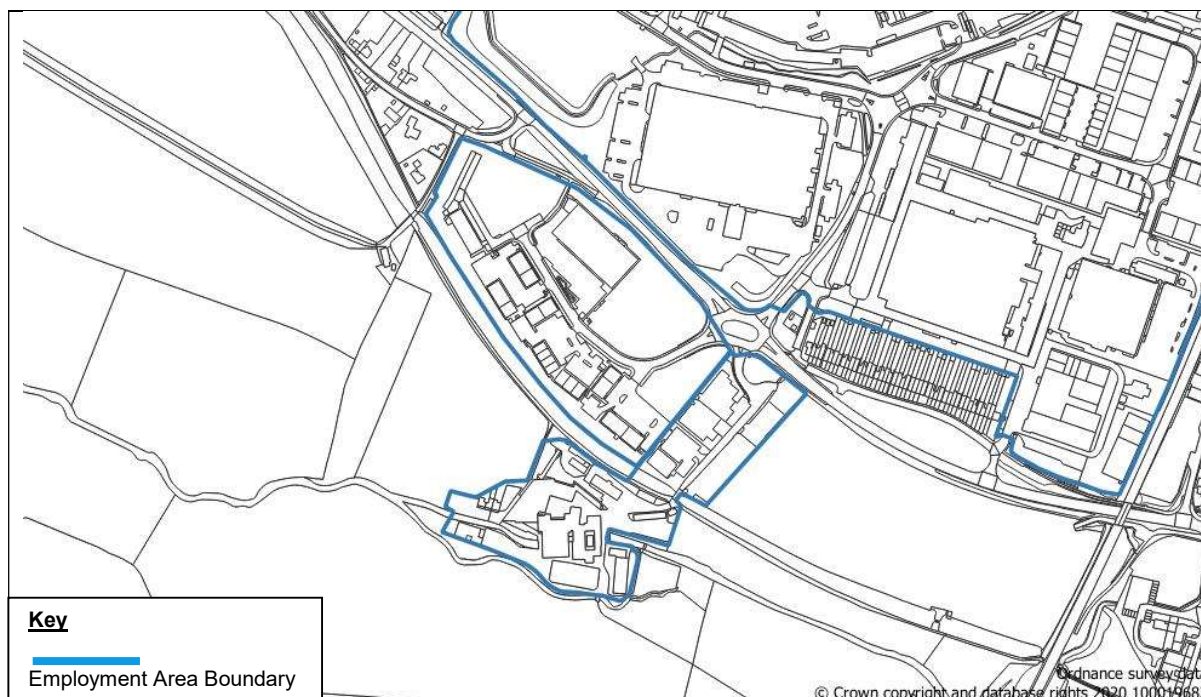
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|---|---|
| Area Reference | 2015 Local Plan Policy EI1 Site EK26 |
| Name | Stonehouse Stroudwater Industrial Estate, Stonehouse |
| Description | Good quality greenfield business park, on a main road location close to Junction 13, M5 |
| Occupier(s) | Multiple – a focus for major employers including Muller, Renishaw, SRF, ABB, Delphi Technologies, and Schlumberger |
| Prominence | High |
| Current Use (Use Classes) | E(g), B2, B8 |
| Size, ha | 60.53 |
| Building Age | Mostly modern (including some new) |
| Building Quality | Good |
| Access Constraints | None |
| Distance to M5 Motorway, km | 2 |
| Distance to A-road, km | Fronts A419 Bristol Road |
| Distance to Rail Station, km | 2 – Stonehouse Station |
| Distance to Existing Bus Route, km | A bus route passes through the area (Oldends Lane) |
| Distance to Services, km | 1 – Stonehouse Town Centre |
| Car Parking | Good – Parking available in front of most units |
| Constraints | Flood risk area in west/north west Conservation Area/key wildlife site to the south Trees in the area |
| Scoring | 89 |
| Opportunities for redevelopment/ expansion | Within the existing Industrial Estate both ABB and Delphi Technologies have expansion land under their ownerships – 1.25 ha and 0.66 ha respectively – which are likely to be held for the exclusive use of those businesses. Other land is in use, including facilities for Travelling Showpeople. Outside of the estate there are strategic development proposals associated with Great Oldbury, which are considered in the Main Report. |
| Other Information | - |

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| Recommendations | The premier business park for Stroud District, providing accommodation for many of the District's major employers. It is also a key local source of modern, good quality industrial units, which can meet the needs of expanding small and medium sized firms. The location should be protected in the Local Plan. |
|-----------------|--|



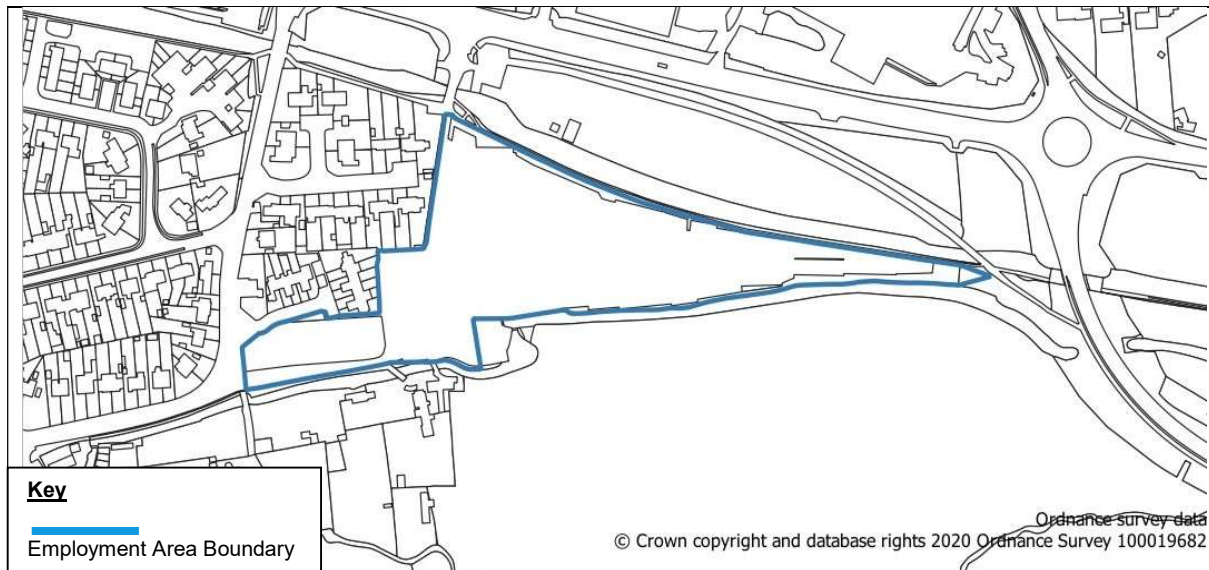
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| Key | |
|  | Employment Area Boundary |
| Area Reference | Local Plan 2015, Policy E11, Site EK27 |
| Name | Stonehouse Park, Stonehouse (Bonds Mill) |
| Description | High quality, modern office park combined with greenfield expansion land, at a canal side location. |
| Occupier(s) | Multiple – Including GCSD, Connexus and Sanctus |
| Prominence | High |
| Current Use (Use Classes) | E(g) (i) |
| Size, ha | 5.04 |
| Building Age | New |
| Building Quality | High |
| Access Constraints | - |
| Distance to M5 Motorway, km | 2 |
| Distance to A-road, km | Fronts A419 Bristol Road |
| Distance to Rail Station, km | 2 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 1 – Stonehouse Town Centre |
| Car Parking | Good – Modern units with reasonable parking provision |
| Constraints | In a key wildlife site Canal side footpath passes next to the area Trees in the area |
| Scoring | 82 |
| Opportunities for redevelopment/ expansion | 0.53 ha remains undeveloped in the north west. Marketed as Phase 4 of Stonehouse Office Park for 1,198 sqm of new offices offered for sale or to let. The main frontage site is owned by Sanctus and partially developed for an industrial unit for that business, with 0.63 ha of further expansion land in the south, under the same ownership. Land in the south east, at the Area entrance is under construction as a Costa Coffeeshop and drive thru. |
| Other Information | - |

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| Recommendations | Stonehouse Park is an important employment area in Stroud District as it is the only source of modern, self-contained office properties in the local authority area. The Park should therefore be protected for this use in the Local Plan. Future proposals that would allow the delivery of more such good quality office space should be encouraged. |
|-----------------|---|

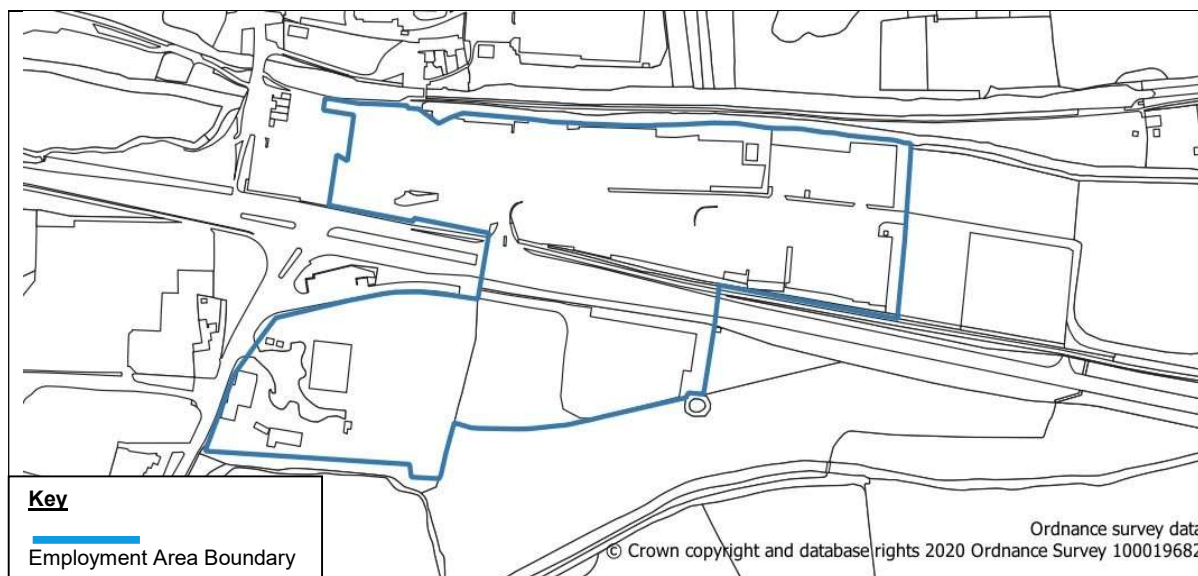


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| Key | |
| Employment Area Boundary | |
| Area Reference | 2015 Local Plan, Policy EI1, Site EK28 |
| Name | Stonehouse Bonds Mill Industrial Estate, Stonehouse |
| Description | Sub-divided, dense former mill complex providing a range of good quality workspace on a canal side location. Also includes several larger industrial units close to the A419 Bristol Road frontage. |
| Occupier(s) | Multiple – Including Nimble, Alan Webb |
| Prominence | Low (most accommodation in backland locations) |
| Current Use (Use Classes) | E, B2, B8 |
| Size, ha | 3.32 |
| Building Age | Mostly pre 1945 |
| Building Quality | Mostly high (some properties have been refurbished and expanded) |
| Access Constraints | Access road is narrow in places, particularly when crossing the canal. |
| Distance to M5 Motorway, km | 2 |
| Distance to A-road, km | Fronts A419 Bristol Road |
| Distance to Rail Station, km | 2 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 1 – Stonehouse Town Centre, plus Costa Coffee at Stonehouse Park and on-site cafe |
| Car Parking | Moderate – The dense nature of the area means that only limited parking can be provided for each unit. |
| Constraints | Partly in Conservation Area Partly in flood risk area Key wildlife sites adjacent Canal side footpath passes through the area Some historic properties may be listed. |
| Scoring | 69 |
| Opportunities for redevelopment/ expansion | A dense employment area. Most land and property appears to be in use, while refurbishment of much of the older mill premises has already taken place. In the south east, Frome House is identified for redevelopment for 520 sqm of E(g) (i) offices. |
| Other Information | - |

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| Recommendations | Successful local employment area, providing a range of smaller office, workshop and storage units for start-up and micro businesses. The industrial estate should be retained and protected as an established local employment area. |
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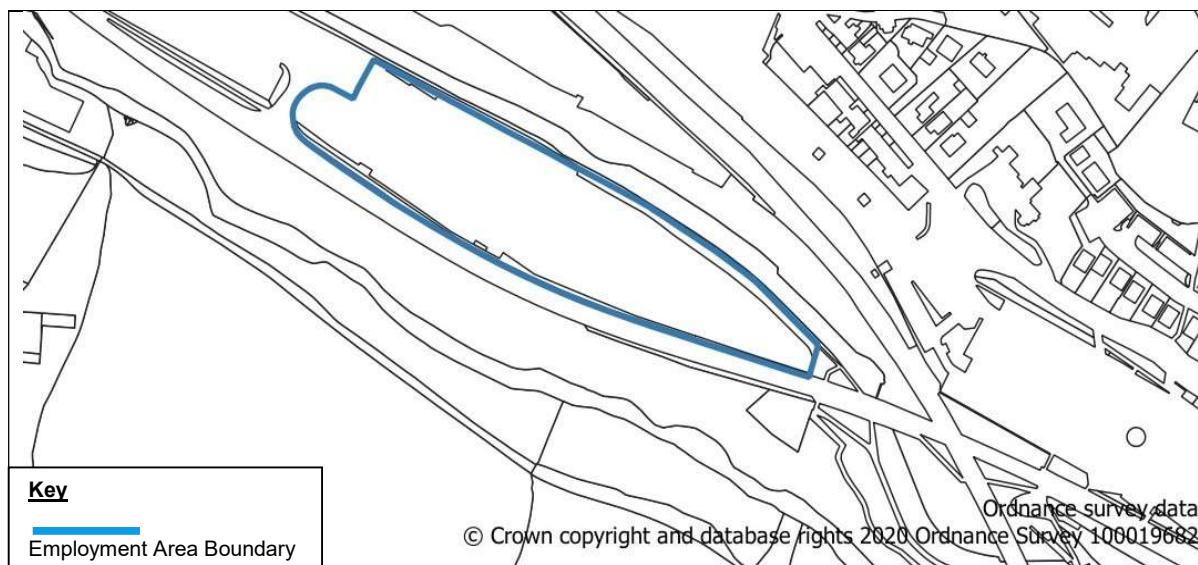


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|---|--|
| Area Reference | Local Plan 2015, Policy EI1, Site EK29 |
| Name | Upper Mills Industrial Estate, Stonehouse |
| Description | Small, linear industrial estate in an edge of settlement location. |
| Occupier(s) | Multiple – Including HallMark Veterinary and Compliance Services, Stonehouse Motor Company |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (iii), B2, B8/ Sui Generis |
| Size, ha | 2.47 |
| Building Age | Modern |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 3 |
| Distance to A-road, km | Off the A419 Bristol Road |
| Distance to Rail Station, km | 1 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 0.5 – Stonehouse Town Centre |
| Car Parking | Moderate – Parking available in front of some units, additional communal parking available in the north of the area. |
| Constraints | In flood risk area Most of the Industrial Estate is within a Conservation Area Key wildlife site to the south Housing to the west |
| Scoring | 62 |
| Opportunities for redevelopment/expansion | Dense industrial estate with all land and premises in use. The units are modern, providing no opportunities for refurbishment. Further growth of the area is prevented by surrounding uses, including land of ecological value to the south. |
| Other Information | - |
| Recommendations | The industrial estate provides good quality industrial accommodation to local employers and should be protected in the Local Plan. |

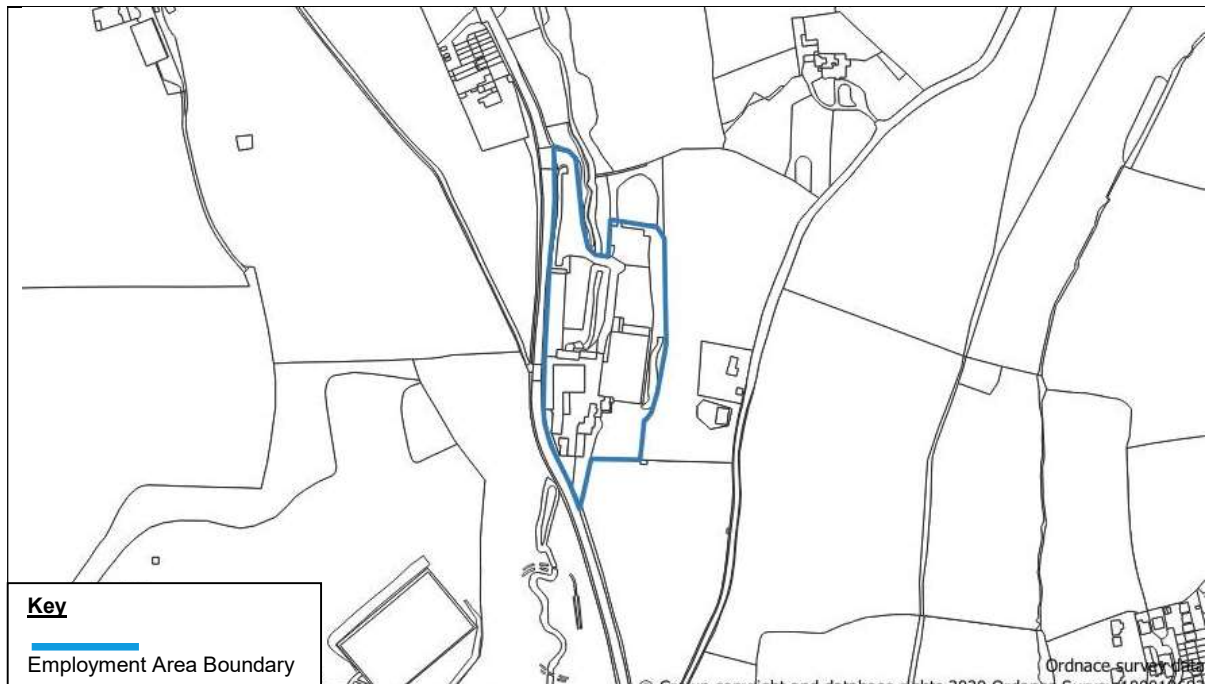


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|---|---|
| Key | |
| Employment Area Boundary | |
| Area Reference | 2015 Local Plan, Policy E11, Site EK30 |
| Name | Ryeford Industrial Area, Stonehouse |
| Description | Budget quality industrial estate, accessed by unsurfaced roads and dominated by trade uses. |
| Occupier(s) | Multiple – Including Kelloway Building Supplies and Automold (south of A419). |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 5.70 |
| Building Age | Post-1960 |
| Building Quality | Low to Moderate |
| Access Constraints | Estate roads are largely unsurfaced |
| Distance to M5 Motorway, km | 4 |
| Distance to A-road, km | Fronts A419 Bristol Road |
| Distance to Rail Station, km | 1 – Stonehouse Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road). |
| Distance to Services, km | 1 – Stonehouse Town Centre |
| Car Parking | Moderate – Some private parking available at all units |
| Constraints | In flood risk area In a Conservation Area Surrounded by key wildlife site Housing/school to the north Trees in the area |
| Scoring | 68 |
| Opportunities for redevelopment/expansion | Dense industrial estate. One infill plot remains in the south, west of Automold and under common ownership (Quinn Properties) with the Automold unit. However, developability may be limited by the constrained access west onto Cotswold Way. Dualling of the A419 here would likely prevent a direct access onto the A Road. North of the A419, the Estate also appears to have extended east of its allocation, towards Stroud Cricket Club. In practice, this has added some 1.10 ha of land to the Employment Area, including one developed unit on 0.30 ha and 0.80 ha of undeveloped land surrounding, which is under common ownership (private individual). This land is accessed by the estate road. |
| Other Information | - |

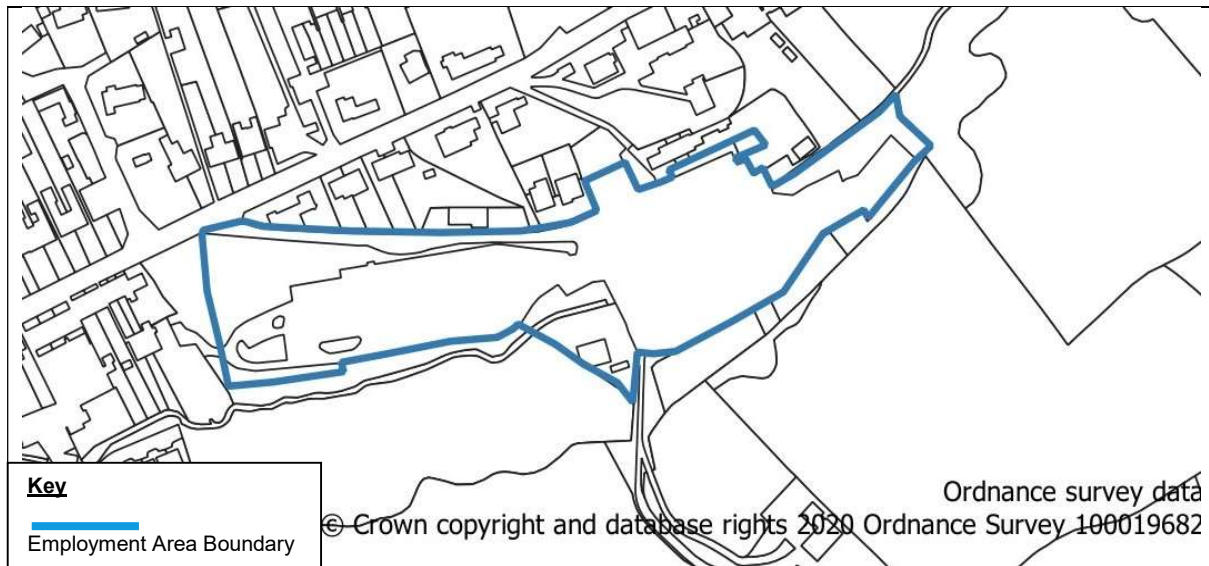
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| Recommendations | Despite unsurfaced roads in places and the low quality of some units the scheme performs well, providing budget quality units (primarily) to local trade companies. It should therefore be protected for employment uses. Some expansion appears to have occurred in the north east and the Council should consider expanding the allocation here to reflect this, a further 1.10 ha of employment land including 0.80 ha of development land. Any future proposals for regeneration should look to improve access and circulation roads. |
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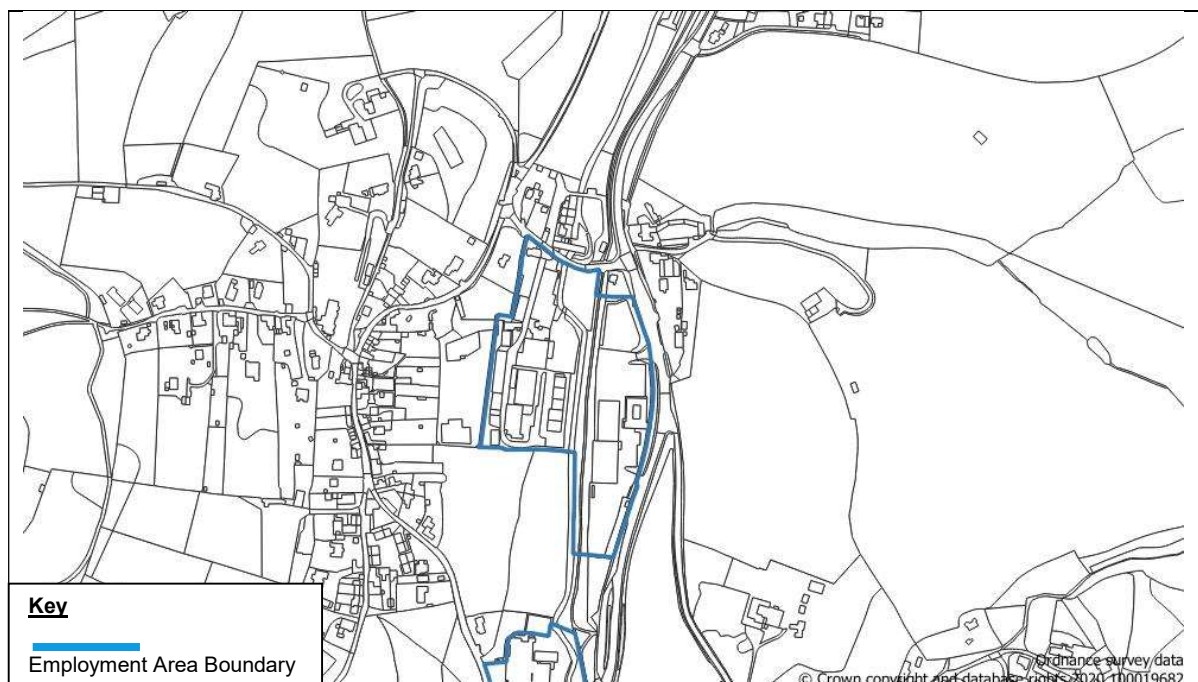
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| Area Reference | Local Plan 2015, Policy E11, Site EK31 |
| Name | Fromside Industrial Estate |
| Description | Small estate of moderate quality terraced industrial units, centrally located in Stroud town. |
| Occupier(s) | Multiple – Including Jewsons, Stroud Lighting Company, Roadrunner Motorcycles |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 1.36 |
| Building Age | Modern |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 8 |
| Distance to A-road, km | Fronts A419 Dr Newton's Way |
| Distance to Rail Station, km | 0.5 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Dr Newton's Way) |
| Distance to Services, km | 0.5 – Stroud Town Centre |
| Car Parking | Good – Some private parking available at all units |
| Constraints | In flood risk area Units back onto Thames Severn Canal |
| Scoring | 69 |
| Opportunities for redevelopment/expansion | Successful industrial estate with all land and premises in use. Further growth of the area is prevented by surrounding uses, including canal to the north. |
| Other Information | - |
| Recommendations | Successful industrial estate prominently located close to Stroud Town Centre. The area has become an established location for trade occupiers (linked to the adjacent Travis Perkins depot) and should be protected for employment uses. |

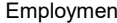


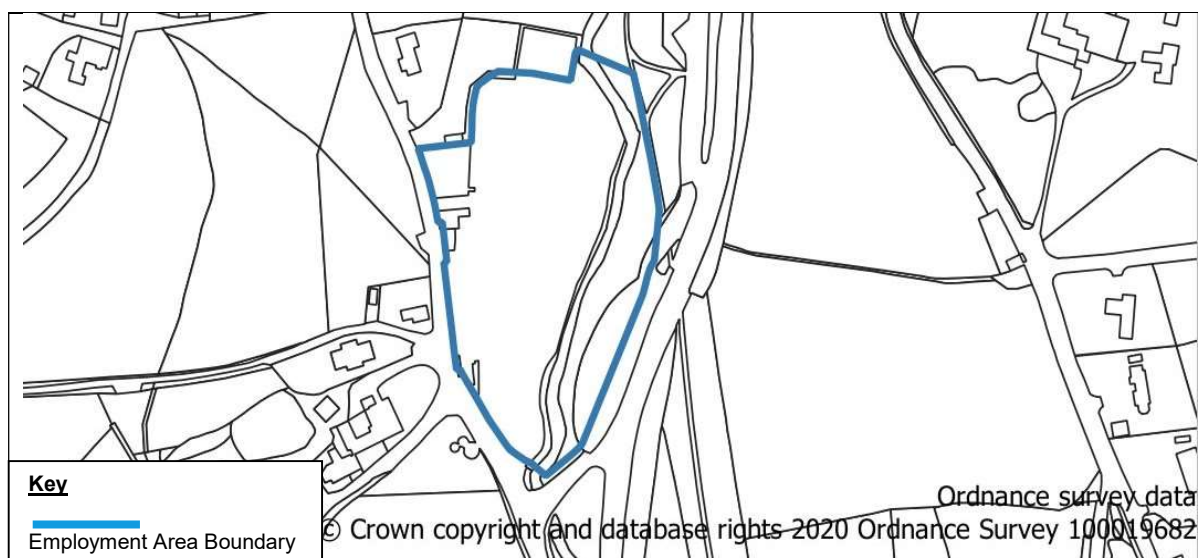
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| Area Reference | Local Plan 2015, Policy E11, Site EK32 |
| Name | Salmon Springs Industrial Estate, Stroud |
| Description | Edge of settlement industrial estate comprising several mill properties on a main road location. |
| Occupier(s) | Multiple including Royal Mail, The Malthouse Collective (Antiques Store) |
| Prominence | High |
| Current Use (Use Classes) | E, B2, B8 |
| Size, ha | 2.07 |
| Building Age | Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 9 |
| Distance to A-road, km | Fronts A46 Painswick Road |
| Distance to Rail Station, km | 1 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Painswick Road) |
| Distance to Services, km | 0.7 – Stroud Town Centre |
| Car Parking | Moderate – Private parking available at some units |
| Constraints | In flood risk area Conservation Area adjacent On the edge of the Cotswold AONB Trees in the area |
| Scoring | 63 |
| Opportunities for redevelopment/ expansion | The historic mill properties may provide some opportunities for further refurbishment and sub-division of units. Further expansion of the area would not be possible without the loss of greenfield land (within the Cotswold AONB). |
| Other Information | - |
| Recommendations | Established local industrial estate, albeit it with one prominent mill property in a predominantly retail use. Premises in reasonable condition for their age. Accommodates some key employers, including Royal Mail. Continue to protect in the Local Plan. |



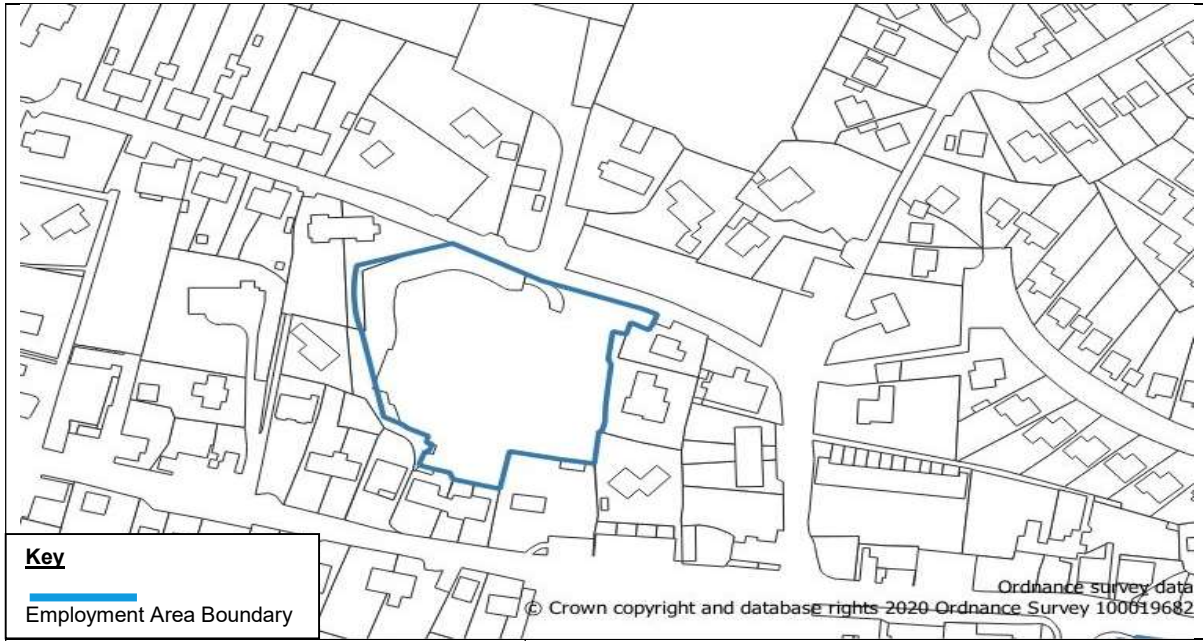
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| Area Reference | Local Plan 2015, Policy EI1, Site EK33 |
| Name | New Mills/Libby Drive, Stroud |
| Description | Small, budget quality industrial and mill complex, to the rear of housing. |
| Occupier(s) | Multiple – Including Rycote |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 1.58 |
| Building Age | Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | Libbys Drive is narrow and sloping |
| Distance to M5 Motorway, km | 10 |
| Distance to A-road, km | 0.8 - A46 Beeches Green |
| Distance to Rail Station, km | 1 – Stroud Station |
| Distance to Existing Bus Route, km | 0.4 - Slad Road |
| Distance to Services, km | 0.8 – Stroud Town Centre |
| Car Parking | Moderate – Limited parking available at some units |
| Constraints | In flood risk area Trees in the area Housing adjacent |
| Scoring | 60 |
| Opportunities for redevelopment/ expansion | Some small scale infill developments consented. Further expansion of the area is prevented by adjacent uses and the sloping topography of the surrounding valley. |
| Other Information | - |
| Recommendations | Small but active local employment area, with consent for some small scale growth. Protect in the Local Plan. |




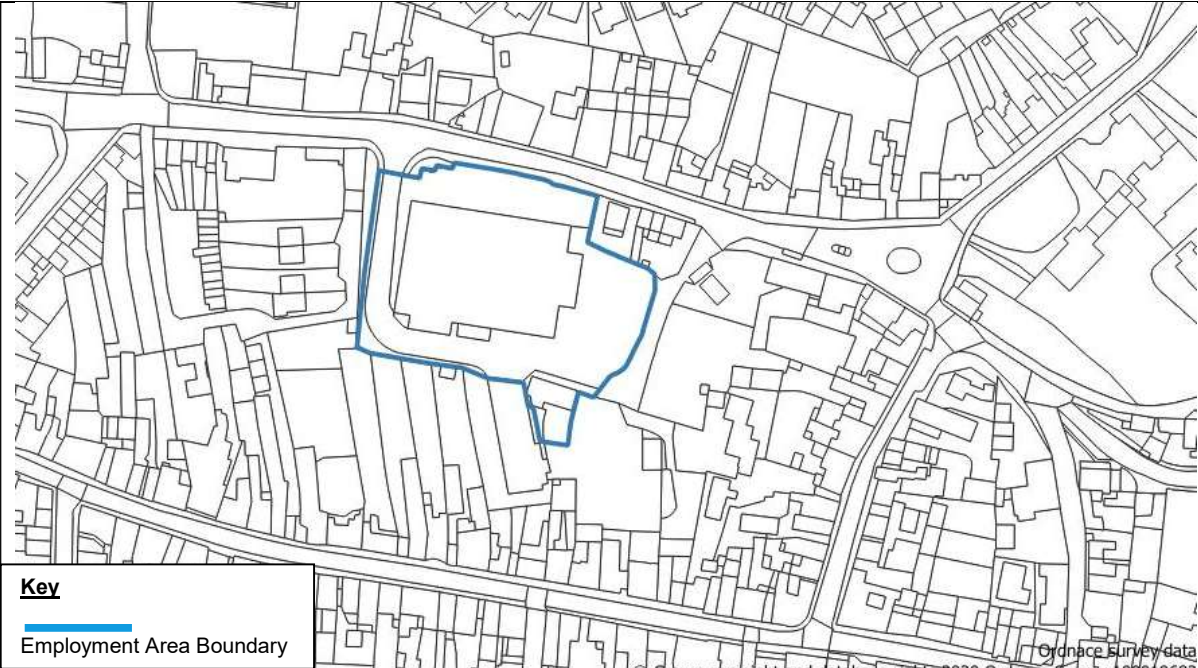
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| Key | |
|  Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy E11, Site EK34 |
| Name | South Woodchester Industrial Area, Woodchester |
| Description | Substantial modern industrial complex (Q Park), with older buildings to the rear, on a main road, edge of settlement location. |
| Occupier(s) | Multiple – Including Woodchester Self Storage |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 3.18 |
| Building Age | Mostly modern |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10 |
| Distance to A-road, km | Fronts the A46 Bristol Road |
| Distance to Rail Station, km | 3.5 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 3 – Foodstore, A46 Dudbridge Hill |
| Car Parking | Good – Parking available for all units |
| Constraints | Flood risk area Public footpath crosses the area In Conservation Area Includes key wildlife sites Trees in the area |
| Scoring | 51 |
| Opportunities for redevelopment/ expansion | There are areas of cleared brownfield land within the curtilage of the facility, mostly fronting Bath Road, which could allow its expansion. Further expansion of the area would not be possible without encroaching into surrounding greenfield land (which includes areas of nature conservation value and land within the Cotswold AONB). |
| Other Information | - |
| Recommendations | A good quality industrial area in the Stroud Valleys, offering a range of modern industrial units. This industrial estate should be protected for employment uses. |




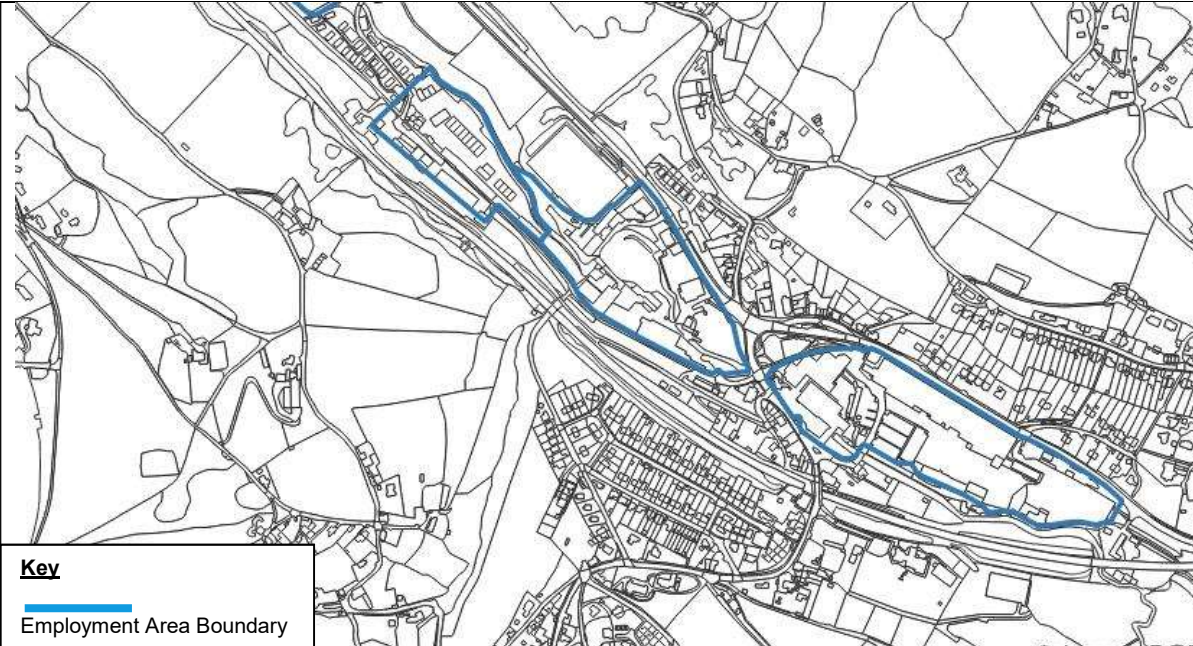
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| Area Reference | Local Plan 2015, Policy E11, Site EK35 |
| Name | Frogmarsh Mill Industrial Area, Woodchester |
| Description | Small, sub-divided mill complex with modern extensions to the rear |
| Occupier(s) | The Bike Works and Bottle Green Drinks Company |
| Prominence | Moderate |
| Current Use (Use Classes) | E/B2 |
| Size, ha | 1.14 |
| Building Age | Pre 1945 |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10.5 |
| Distance to A-road, km | Fronts the A46 Bristol Road |
| Distance to Rail Station, km | 4 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 2.5 – Nailsworth Town Centre |
| Car Parking | Good – Parking available for all units |
| Constraints | Flood risk area Public footpath crosses the area In Conservation Area Includes key wildlife sites Trees in the area Some historic properties may be listed. |
| Scoring | 50 |
| Opportunities for redevelopment/expansion | Small, dense employment area. The primary occupier (Bottle Green) has gradually expanded its operation over the past 10 years, taking up most of the available land and buildings (land fronting the A46 is wooded, sloping and inaccessible). Further expansion of the area is constrained by surrounding uses. |
| Other Information | - |
| Recommendations | Small, good quality employment area housing a large local employer. The area should be protected for employment uses. |




| | |
|---|---|
| Key | |
|  | Employment Area Boundary |
| Area Reference | Local Plan 2015, Policy E11, Site EK36 |
| Name | Tabernacle Road, Wotton-under-Edge |
| Description | Small backland industrial estate, dominated by motor trade occupiers |
| Occupier(s) | Multiple – Including Bank Yard Garage |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (iii), Sui Generis |
| Size, ha | 0.52 |
| Building Age | Post 1960 |
| Building Quality | Moderate |
| Access Constraints | Backland site accessed by narrow, sloping residential road |
| Distance to M5 Motorway, km | 8 |
| Distance to A-road, km | 5 – A4135 Whiteway |
| Distance to Rail Station, km | 14 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | 0.1 – Gloucester Street |
| Distance to Services, km | 0.5 – Wotton local shops (Long Street) |
| Car Parking | Moderate– Private parking available for some units |
| Constraints | Wotton is within the Cotswold AONB Conservation Area adjacent |
| Scoring | 51 |
| Opportunities for redevelopment/ expansion | Dense area of reasonable quality industrial units, surrounded by housing. No refurbishment, redevelopment or expansion opportunities. |
| Other Information | - |
| Recommendations | Small reasonable quality employment area, serving local needs. Tabernacle Road should be protected for employment uses. |

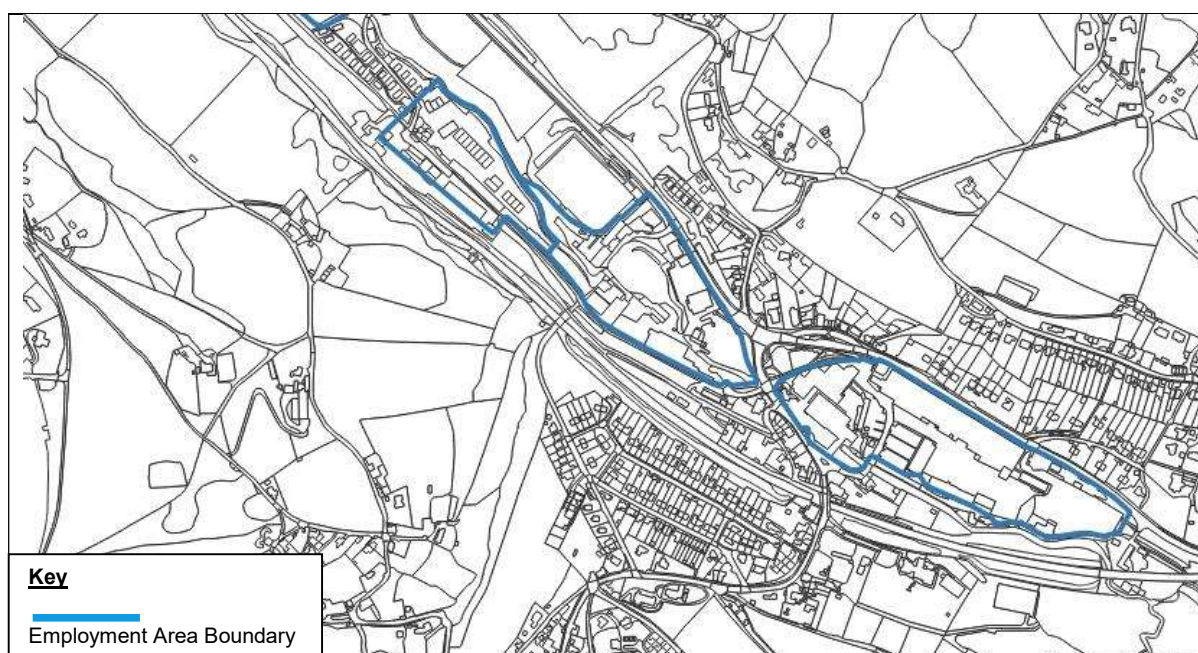


| Key | |
|---|---|
|  | Employment Area Boundary |
| Area Reference | Local Plan 2015, Policy E11, Site EK37 |
| Name | Renishaw Old Town, Wotton-under-Edge |
| Description | Solus facility for a major employer, centrally located in Wotton village |
| Occupier(s) | Renishaw |
| Prominence | High |
| Current Use (Use Classes) | B1(a), B2 |
| Size, ha | 0.57 |
| Building Age | Post 1960 |
| Building Quality | Good |
| Access Constraints | - |
| Distance to M5 Motorway, km | 8 |
| Distance to A-road, km | 5 – A4135 Whiteway |
| Distance to Rail Station, km | 14 – Cam and Dursley Railway Station |
| Distance to Existing Bus Route, km | On bus route (Gloucester Street) |
| Distance to Services, km | 0.1 – Wotton local shops (Long Street) |
| Car Parking | High – reasonable private parking available |
| Constraints | Wotton is within the Cotswold AONB In Conservation Area Surrounded by housing |
| Scoring | 44 |
| Opportunities for redevelopment/ expansion | Further expansion is constrained by surrounding uses. |
| Other Information | - |
| Recommendations | Facility for a major local employer which should be protected for employment uses. |



| Key  Employment Area Boundary | |
|--|---|
| Area Reference | Local Plan 2015, Policy EI2, Site ER1 |
| Name | Brimscombe Port Industrial Estate, Brimscombe and Thrupp |
| Description | Historic mill complex, sub-divided to provide small office and workshop accommodation. |
| Occupier(s) | Multiple – Including Inside Football, Cotswold Canal Trust |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 4.20 |
| Building Age | Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 11.1 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 3.1 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2.5 – Stroud Town Centre |
| Car Parking | Moderate – Limited parking available at some units |
| Constraints | In flood risk area In Conservation Area Trees in the area Housing adjacent Some historic properties are listed High infrastructure costs associated with development |
| Scoring | 73 |
| Opportunities for redevelopment/ expansion | The site is allocated in the Local Plan for partial redevelopment for new homes, canal related tourism development and employment uses. The Council is actively pursuing a mixed use regeneration scheme for the site which will involve restoration of a canal basin and redevelopment of the site. Proposals are being progressed through the planning system and a development partner will be selected shortly. |
| Other Information | - |

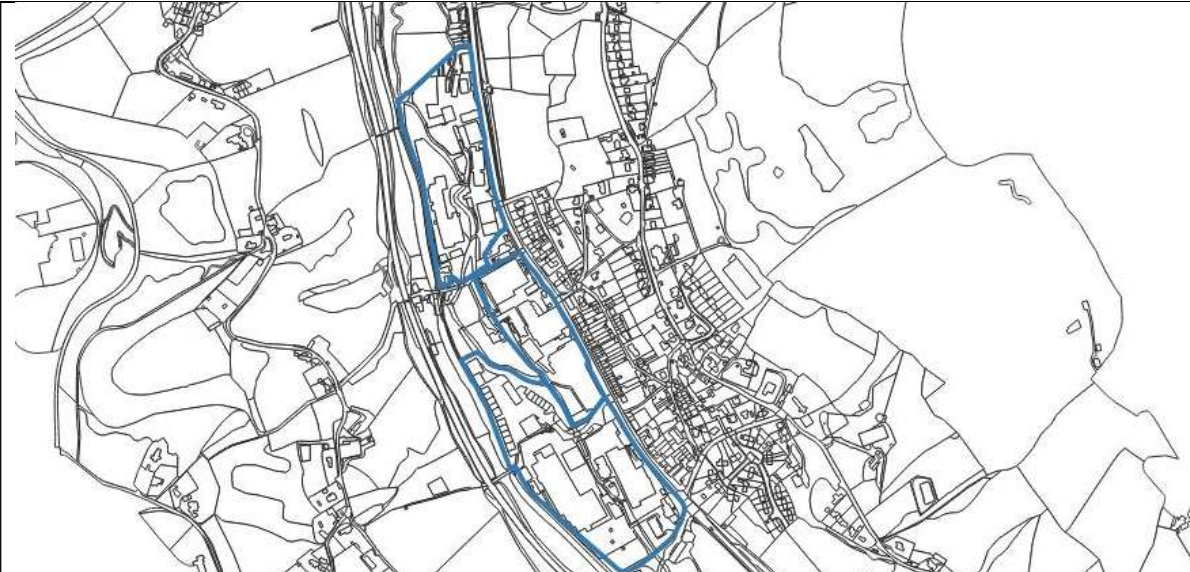
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| Recommendations | The Council has now taken a lead on regeneration here and is expected to progress things more rapidly over the next few years, particularly if it can become the Port owner and provide the relevant infrastructure, reducing development costs. In the meantime, the Port is reasonably well occupied with mostly budget businesses. Brimscombe Port should therefore continue to be identified as a regeneration opportunity site in the Local Plan. |
|-----------------|--|



Key
 Employment Area Boundary

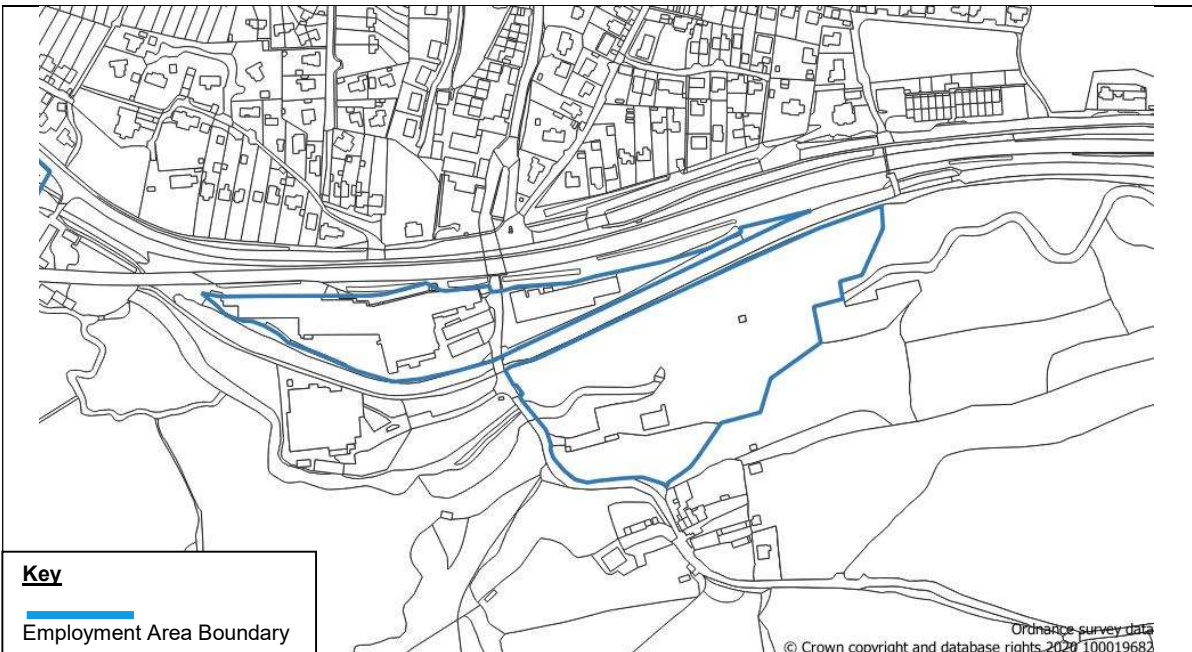
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| Area Reference | Local Plan 2015, Policy EI2, Site ER2 |
| Name | Brimscombe Mills, Brimscombe and Thrupp |
| Description | Established, low quality industrial estate, in a backland location, including a large vacant mill building. |
| Occupier(s) | Multiple – Including Brimscombe & Thrupp Social Centre, Connectiq. Brimscombe Mill itself is Understood to Be Vacant. |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 3.11 |
| Building Age | Various |
| Building Quality | Low |
| Access Constraints | Narrow, unsurfaced access in places. |
| Distance to M5 Motorway, km | 11 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 3 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2.4 – Stroud Town Centre |
| Car Parking | Moderate – Limited parking available at some units |
| Constraints | In flood risk area In Conservation Area Trees in the area Recreation areas adjacent Waterbodies on site Some historic properties may be listed. |
| Scoring | 64 |


| | |
|--|---|
| Opportunities for redevelopment/ expansion | <p>In December 2019 Bonehill Capital submitted a Full planning application for Brimscombe Mill (0.48 ha) for reuse of the 1,850 sqm Mill for a:</p> <ul style="list-style-type: none"> • Wellness Centre • Coffee shop/Café • Antiques place storage and trade • Offices and Record Storage • Brewery and Distillery. <p>App. No. S.19/2690/FUL. This application remains undecided.</p> |
| Other Information | - |
| Recommendations | <p>Low grade mill premises, much of which is vacant. However, there are reuse plans on the main building here, for primarily E/B-Class uses. Thus, the location remains of interest as a regeneration area and it should be protected as such in the Local Plan.</p> |



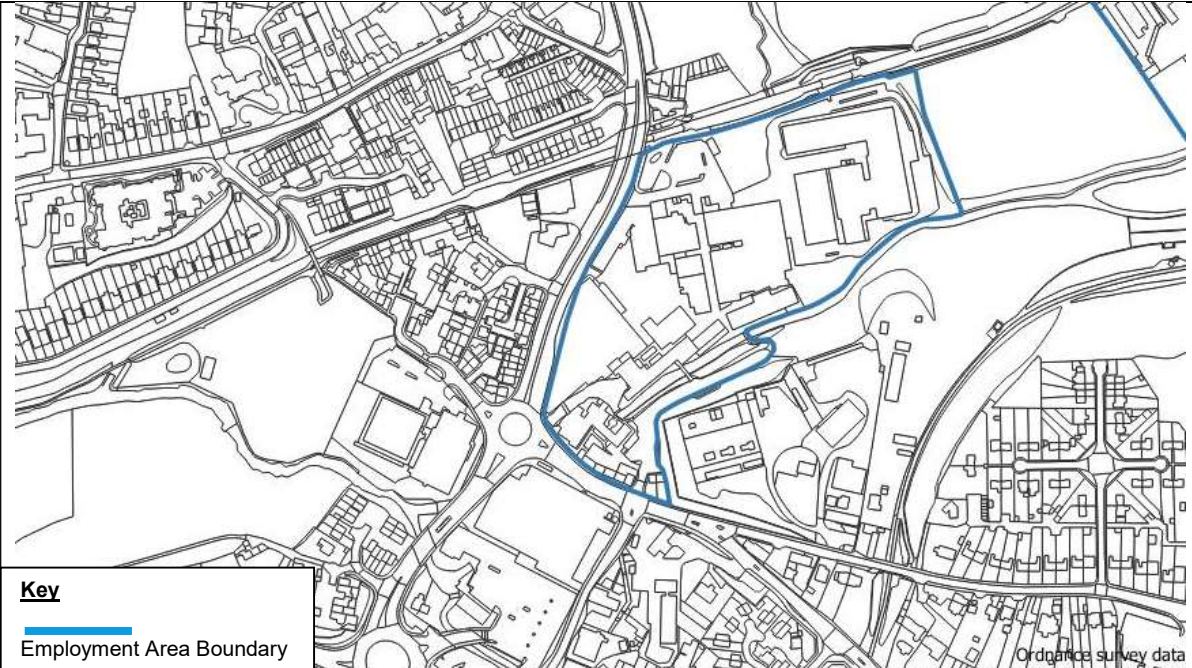
Key
Employment Area Boundary


| | |
|---|--|
| Area Reference | Local Plan 2015, Policy EI2, Site ER3 |
| Name | ER3 Brimscombe and Thrupp Ham Mills |
| Description | Vacant older industrial complex, surrounded by woodland, off the A419 |
| Occupier(s) | None |
| Prominence | Moderate |
| Current Use (Use Classes) | Previously E(g) (iii), B2, B8 |
| Size, ha | 2.02 |
| Building Age | Pre –1945 (primarily) |
| Building Quality | Low |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10.4 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 2.4 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 2 – Stroud Town Centre |
| Car Parking | Appears limited |
| Constraints | In flood risk area In Conservation Area Assumed some Listed buildings Trees in the area |
| Scoring | 57 |
| Opportunities for redevelopment/ expansion | In 2017 Ham Mills received full planning consent for the restoration of the mill building, the development of 100 new homes, 686 sqm of B1(a) office floor-space and 286 sqm of flexible floorspace, by owner Stroud Corporation NV (App. No. S.15/1751/FUL). A timeframe for delivery is not known. |
| Other Information | - |
| Recommendations | Remains a regeneration opportunity site at present. However, consented plans would, if delivered be primarily for housing, albeit with some B1(a) offices. The mixed-use nature of the Area would need to be recognised in the Local Plan. |

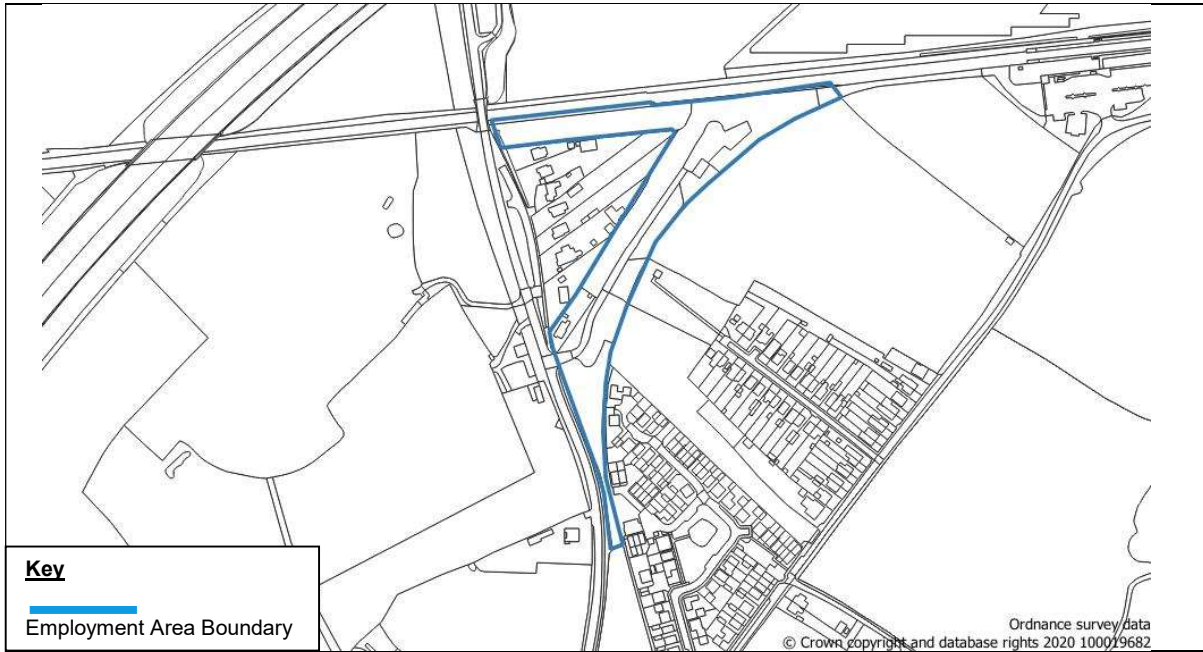


| Key  Employment Area Boundary | |
|--|---|
| Area Reference | Local Plan 2015, Policy EI2, Site ER4 |
| Name | Wimberley Mills and Dockyard Works, Minchinhampton |
| Description | Budget quality industrial and mill complex, located north and south of the River Frome |
| Occupier(s) | Primarily Olympic Group |
| Prominence | Low |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 6.46 |
| Building Age | Pre 1945 |
| Building Quality | Moderate |
| Access Constraints | Access from the A419 London Road is via a narrow rail bridge. |
| Distance to M5 Motorway, km | 12 |
| Distance to A-road, km | 0.1 - A419 London Road |
| Distance to Rail Station, km | 4 – Stroud Station |
| Distance to Existing Bus Route, km | 0.1 - A419 London Road |
| Distance to Services, km | 3.5 – Bussage local shops (Tanglewood Way) |
| Car Parking | Moderate – Limited parking available at some units |
| Constraints | In flood risk area In Conservation Area Trees in the area River and public footpaths pass through area |
| Scoring | 45 |
| Opportunities for redevelopment/ expansion | Land south of the Themes and Severn Canal is cleared with Outline and Reserved Matters consents for 104 dwellings (Main App. No. S.13/2668/OUT) on 2.78 ha of the Area. Other land and premises appears in full use and does not offer any short or medium-term regeneration opportunities. |
| Other Information | - |

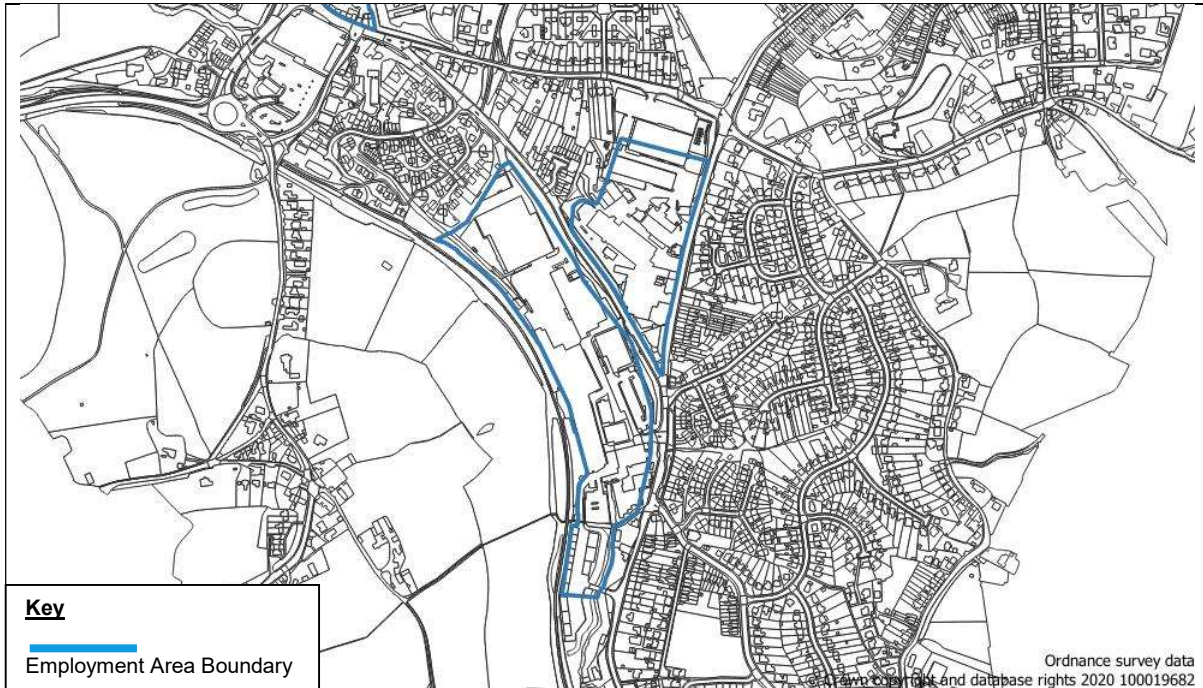
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| Recommendations | Wimberley Mills continues to function as a small, moderately successful, industrial employment area in the Stroud Valleys. While the available land and premises may offer some long term regeneration opportunities, at present, it appears well used and should be protected in the Local Plan for E/B-Class uses. Land south of the Themes and Severn Canal is now consented for housing and should be excluded from any future employment allocation. |
|-----------------|---|



| Key  Employment Area Boundary | |
|--|---|
| Area Reference | Local Plan 2025, Policy EI2, Site ER5 |
| Name | Dudbridge Industrial Estate, Cainscross, Stroud |
| Description | Partly cleared mill complex. Housing and retail development site |
| Occupier(s) | None |
| Prominence | High |
| Current Use (Use Classes) | None |
| Size, ha | 4.90 |
| Building Age | Buildings partly/fully cleared |
| Building Quality | N/A |
| Access Constraints | Accessed via dual carriageway |
| Distance to M5 Motorway, km | 7 |
| Distance to A-road, km | Fronts A419 Dudbridge Road and A46 Dudbridge Hill |
| Distance to Rail Station, km | 2 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (A419 Dudbridge Road). |
| Distance to Services, km | Foodstore adjacent |
| Car Parking | N/A |
| Constraints | In flood risk area In a Conservation Area Recreation space to the east Public footpath crosses the area Trees in the area |
| Scoring | N/A |
| Opportunities for redevelopment/expansion | Whole site now consented, partly in Outline, partly full for a foodstore (Lidl) and 130 homes (main App. No. S.17/1987/OUT). Much of the site has now been cleared. |
| Other Information | - |
| Recommendations | Regardless of what is ultimately delivered here, ER5 is no longer an active Employment Area or employment development land and it should be allocated for its new uses in the Local Plan. |

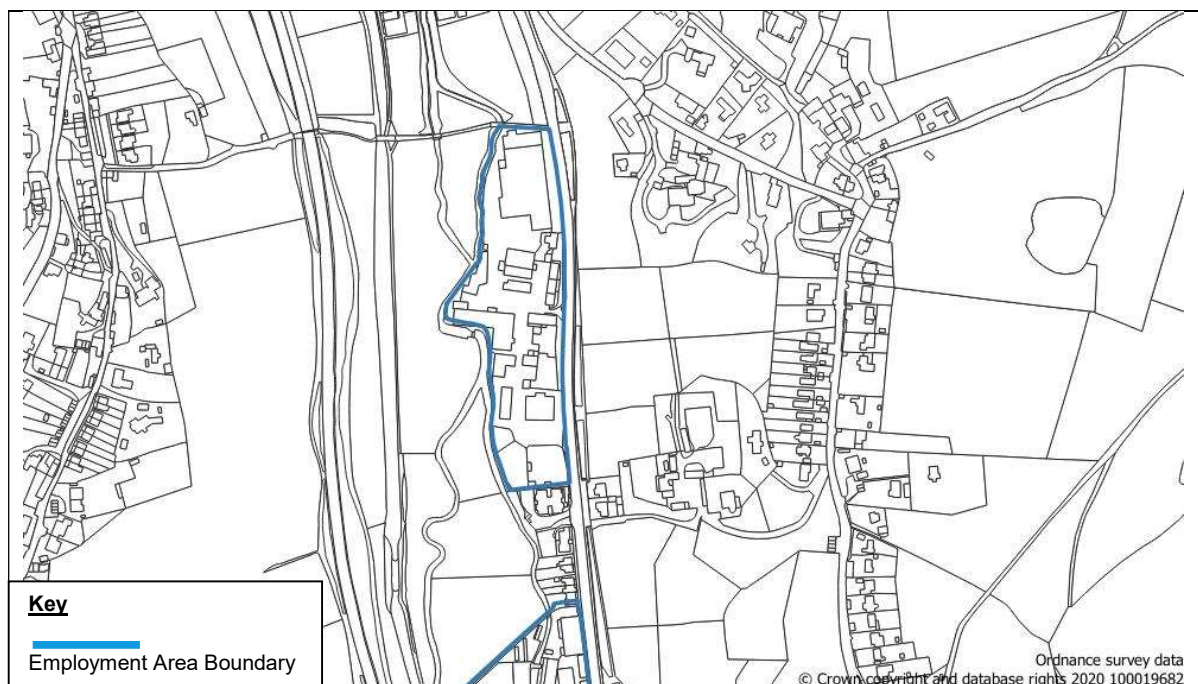


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|--|---|
| Area Reference | Local Plan 2015, Policy EI2, Site ER6 |
| Name | Coaley Junction Industrial Estate, Cam |
| Description | Rural open storage yard (former rail yard), in an edge of settlement location off a main road. Site is now being redeveloped for housing. |
| Occupier(s) | None |
| Prominence | High |
| Current Use (Use Classes) | N/A |
| Size, ha | 0.95 |
| Building Age | N/A |
| Building Quality | N/A |
| Access Constraints | - |
| Distance to M5 Motorway, km | 7 |
| Distance to A-road, km | Off the A4135 Draycott |
| Distance to Rail Station, km | 1 – Cam and Dursley Station |
| Distance to Existing Bus Route, km | On bus route (Draycott) |
| Distance to Services, km | 0.6 – Petrol filling station and convenience store, Draycott |
| Car Parking | N/A |
| Constraints | Trees in the area |
| Scoring | N/A |
| Opportunities for redevelopment/ expansion | Land has consent for 41 dwellings (App. No. S.18/0044/FUL). Development appears to have commenced. |
| Other Information | - |
| Recommendations | Now a housing development site. Any allocation in the Local Plan should reflect that. |

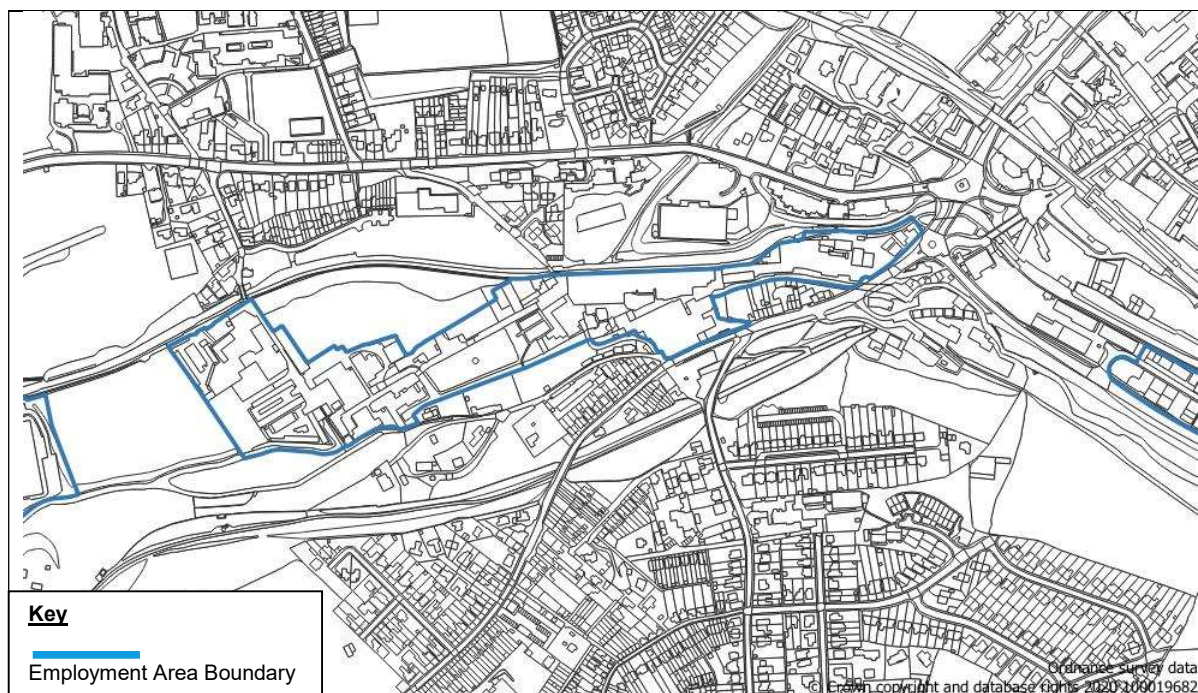


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|---|---|
| Key | |
| Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy EI2, Site ER7 |
| Name | Daniels Industrial Estate, Bath Road, Rodborough, Stroud |
| Description | Moderate quality industrial estate on a steeply sloping hillside location. Land at main road junction has now been redeveloped for housing. Much of the rest of the Area also has consent for housing. |
| Occupier(s) | Multiple – Including Siren Alarms, Blandon Systems, Willis Westcott |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 3.34 |
| Building Age | Various – Mostly post-1960 |
| Building Quality | Moderate |
| Access Constraints | Access to north of the area is steeply sloping |
| Distance to M5 Motorway, km | 7.5 |
| Distance to A-road, km | Fronts A46 Dudbridge Road |
| Distance to Rail Station, km | 2.5 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Dudbridge Road) |
| Distance to Services, km | 0.4 – Foodstore on Dudbridge Hill |
| Car Parking | Moderate – Some private parking available at some units |
| Constraints | Housing to the north west and east Trees in the area |
| Scoring | N/A |
| Opportunities for redevelopment/expansion | Although large parts of the Area remain operational, there is Outline Consent for 50 dwellings a new foodstore and other food and drink units across the bulk of the site (App. No. S.16/2152/OUT), with some flats developed in the south. |
| Other Information | - |

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|-----------------|---|
| Recommendations | Although much of the Industrial Estate remains operational, the principle of non E/B-Class development has been established here, both through Outline Consent and some housing development. The Local Plan should therefore recognise that this is likely to be a housing and retail site in the future. |
|-----------------|---|

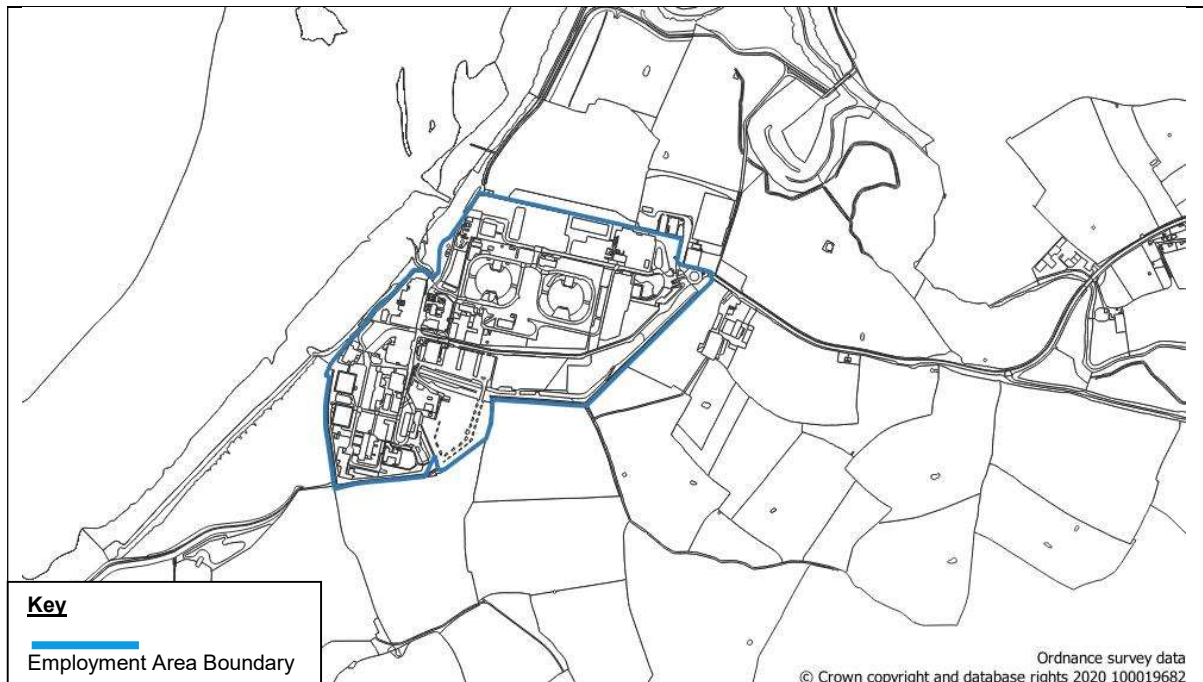


| | |
|---|---|
| Area Reference | Local Plan 2015, Policy E12, Site ER8 |
| Name | Stafford Mills Industrial Estate, Stroud |
| Description | Small, budget quality industrial estate dominated by motor trade occupiers. |
| Occupier(s) | Multiple – Including Crown Aluminium |
| Prominence | High |
| Current Use (Use Classes) | E(g) (iii), B2, B8, Sui Generis |
| Size, ha | 1.71 |
| Building Age | Mostly post 1960 |
| Building Quality | Low |
| Access Constraints | - |
| Distance to M5 Motorway, km | 10 |
| Distance to A-road, km | Off the A419 London Road |
| Distance to Rail Station, km | 2 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (London Road) |
| Distance to Services, km | 1.5 – Stroud Town Centre |
| Car Parking | Good – Private parking available all units |
| Constraints | In flood risk area In Conservation Area Trees in the area |
| Scoring | 61 |
| Opportunities for redevelopment/ expansion | Low quality units within the estate may provide small scale opportunities for refurbishment and redevelopment. However, most buildings appear in use by budget and heavy industry occupiers who may struggle to find affordable accommodation elsewhere. Further expansion of the estate would require bridging of the River Frome to the west. |
| Other Information | - |
| Recommendations | While the Estate may provide some regeneration opportunities, it appears most land and premises is in active use, with no obvious plans for change. This small industrial estate should therefore be broadly protected for employment uses, albeit with some flexibility if appropriate mixed-use development options are put forward. |



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| Key | |
| Employment Area Boundary | |
| Area Reference | Local Plan 2015, Policy EI2, Site ER9 |
| Name | Lodgemore and Fromehall Mills, Stroud |
| Description | Linear, canal side industrial estate, including historic mill complexes, close to Stroud Town Centre |
| Occupier(s) | Multiple – Including WSP Textiles |
| Prominence | Moderate |
| Current Use (Use Classes) | E(g) (iii), B2, B8 |
| Size, ha | 6.53 |
| Building Age | Pre-1945 |
| Building Quality | Moderate |
| Access Constraints | - |
| Distance to M5 Motorway, km | 11 |
| Distance to A-road, km | Off the A46 Bristol Road |
| Distance to Rail Station, km | 0.3 – Stroud Station |
| Distance to Existing Bus Route, km | On bus route (Bristol Road) |
| Distance to Services, km | 0.1 – Stroud Town Centre |
| Car Parking | Poor – limited private parking for some units |
| Constraints | In flood risk area In Conservation Area Recreation areas and key wildlife sites adjacent Public footpath crosses the area. Trees in the area |
| Scoring | 69 |
| Opportunities for redevelopment/expansion | Although individual mill properties may provide some opportunities for refurbishment, the area as a whole appears well occupied and most land/property is in use. There is an area of undeveloped canal side land, between the Chestnut Lane and Lodgemore Lane canal bridges. This could be used to deliver further employment premises. However, there is no evidence that this backland site would be desirable to developers or occupiers. |
| Other Information | - |

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| Recommendations | Lodgemore/Fromehall Mills is a significant employment area, prominently located close to the centre of Stroud Town. The area should therefore be protected for employment uses. Although, land is potentially available to support a further development of employment development, short/medium term change is likely to be limited to the refurbishment and improvement of the existing properties. |
|-----------------|---|



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|------------------------------------|--|
| Area Reference | Local Plan 2015, Policy EI2a |
| Name | Former Berkeley Power Station, Berkeley |
| Description | A decommissioned nuclear power station along with office/lab accommodation which is now a science park (Gloucestershire Science and Technology Park (GSTP)), in a rural location by the River Severn |
| Occupier(s) | Multiple – Including Magnox (occupy main power station site), SGS Green Skills Centre, SGS Berkeley Green UTC, Bloodhound, Gloucestershire Constabulary |
| Prominence | Low |
| Current Use (Use Classes) | E(g), B8 |
| Size, ha | 31.89 |
| Building Age | Post 1945 |
| Building Quality | Good |
| Access Constraints | Local road access through Berkeley settlement area. Although this does not impact on car access it limits HGV access which impacts on the type and scale of companies which can be accommodated on the GSTP. |
| Distance to M5 Motorway, km | 16 |
| Distance to A-road, km | 5 - A38 |
| Distance to Rail Station, km | 12 – Cam and Dursley Station. Site would benefit from the opening of Sharpness Station to passenger services. |
| Distance to Existing Bus Route, km | Bus links to the Power Station/GSTP |
| Distance to Services, km | 2 – Berkeley local shops (Marybrook Street/Market Place) |
| Car Parking | Good – Extensive onsite parking available |
| Constraints | In flood risk area Adjacent to Internationally Important Wildlife Site Recreation space adjacent Nuclear facilities being decommissioned Trees in the area |
| Scoring | 55 |

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| <p>Opportunities for redevelopment/expansion</p> | <p>Office, industrial and lab space within the Power Station are now established as the GSTP on 16 ha. GSTP comprises school, college, and university buildings, along with businesses of science/ research nature. All businesses who locate on the site must be in sectors related to research into science and technology and be able to support education/skills activity.</p> <p>It is owned by South Gloucestershire and Stroud College. Demand is understood to be strong, the GSTP is well located between Bristol, Gloucester and Cheltenham and ideal for technology companies who do not want to pay city prices. Once buildings are refurbished, they can be let quickly although funding requirements can slow down the letting process.</p> <p>Once decommissioning has finished on the rest of the site, some 16 ha more land, in 3-5 years, the College intends to develop it for more business space (offices/workshops) over a further 5-year timeframe. The intention would be to utilise existing buildings and then consider brownfield development. Greenfield expansion is not proposed at this time.</p> <p>In December 2020, the UK Atomic Energy Authority launched a process to find a home for STEP (Spherical Tokamak for Energy Production) – a programme to build a fusion prototype plant. The Western Gateway is proposing a joint Oldbury-Berkeley bid to locate the power plant and initial technical centre at these sites. If successful, the project will create thousands of highly skilled jobs here. The aim is for the design phase – an outline of the power plant, with a clear view on how each of the major systems is designed – to be completed by 2024. Completion of the construction of the prototype power plant is targeted for 2040.</p> |
| <p>Other Information</p> | <p>-</p> |
| <p>Recommendations</p> | <p>The area which forms the GSTP should be allocated as an employment area for (E(g), B8 employment uses in the development plan. The allocation should cover the whole nuclear site on the anticipation that some or all of the nuclear facilities being decommissioned will be re-used as business space over the Local Plan period.</p> |

Appendix 5

Site, Area Scoring System

Appendix 5 – Site/Area Scoring System

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|----------------------------------|-----------------------|--|
| Site Location and Access | Location | <p>Proximity to strategic highway network (M5 Motorway and/or A38, A46 or A419):</p> <ul style="list-style-type: none"> • Site/Area 0 km from a strategic road – score 10 • Site/Area 0.5 km from a strategic road – score 9 • Site/Area 1.0 km from a strategic road – score 8 • For each further half km distance from a strategic road, reduce score by one point, i.e. any site 5.0 km or further from a strategic road scores zero. |
| | Prominence | <ul style="list-style-type: none"> • Site/Area adjacent to, and visible from motorway – score 10/9 • Site/Area adjacent to, and visible from A road – score 8/7 • Site/Area adjacent to, and visible from B road – score 6/5 • Site/Area has local prominence, e.g. within its industrial location – score 4/3 • Site/Area located in 'backlands' – score 2/1/0 |
| | Public Transport | <ul style="list-style-type: none"> • Site/Area close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site/Area within 0.5 km of a bus route – score 5 • Limited public transport – score 0 |
| | Sequential Test | <ul style="list-style-type: none"> • Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3 |
| Planning Status/Growth Prospects | | <ul style="list-style-type: none"> • If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1 <p>Employment Areas score more generally. If multiple occupiers/developers are seeking/have planning consent for growth score 10. No evidence that physical expansion is being sought through planning, Score 0.</p> |
| Site Conditions | Services Availability | <ul style="list-style-type: none"> • If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0 |
| | Constraints | <p>May be physical (including access), planning, or legal</p> <p>Reduce score by 2 for each constraint</p> <p>If there are none – score 10</p> |
| | Environmental Setting | <p>Subjective, score 0 to 10, examples:</p> <ul style="list-style-type: none"> • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2 |
| | Flexibility | <p>Subjective, score 0 to 10:</p> <p>Score site in terms of site shape and ability to sub-divide to suit smaller occupiers. Score Areas in terms of scale and capacity to</p> |

| | | |
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| | | accommodate business properties of deferent sizes and uses – large warehouse, industrial, office, etc. Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible. |
| | <i>For Employment Sites Only: Site Availability</i> | <ul style="list-style-type: none"> • Site available to develop within 0-1 year – score 10 • Site available to develop within 1-5 years – score 8 • Site available to develop 5-10 years – score 6 • Site available to develop 10+ years – score 2 |
| | <i>For Employment Areas Only: Critical Mass</i> | The number and diversity of the businesses occupying the site, which might attract other firms to co-locate and create economies of scale. Large Area with a diverse offer Score 10, few or no occupiers Score 0. |

Source: BE Group, 2020

Appendix 6

Areas Scoring

Appendix 6 – Areas Scoring

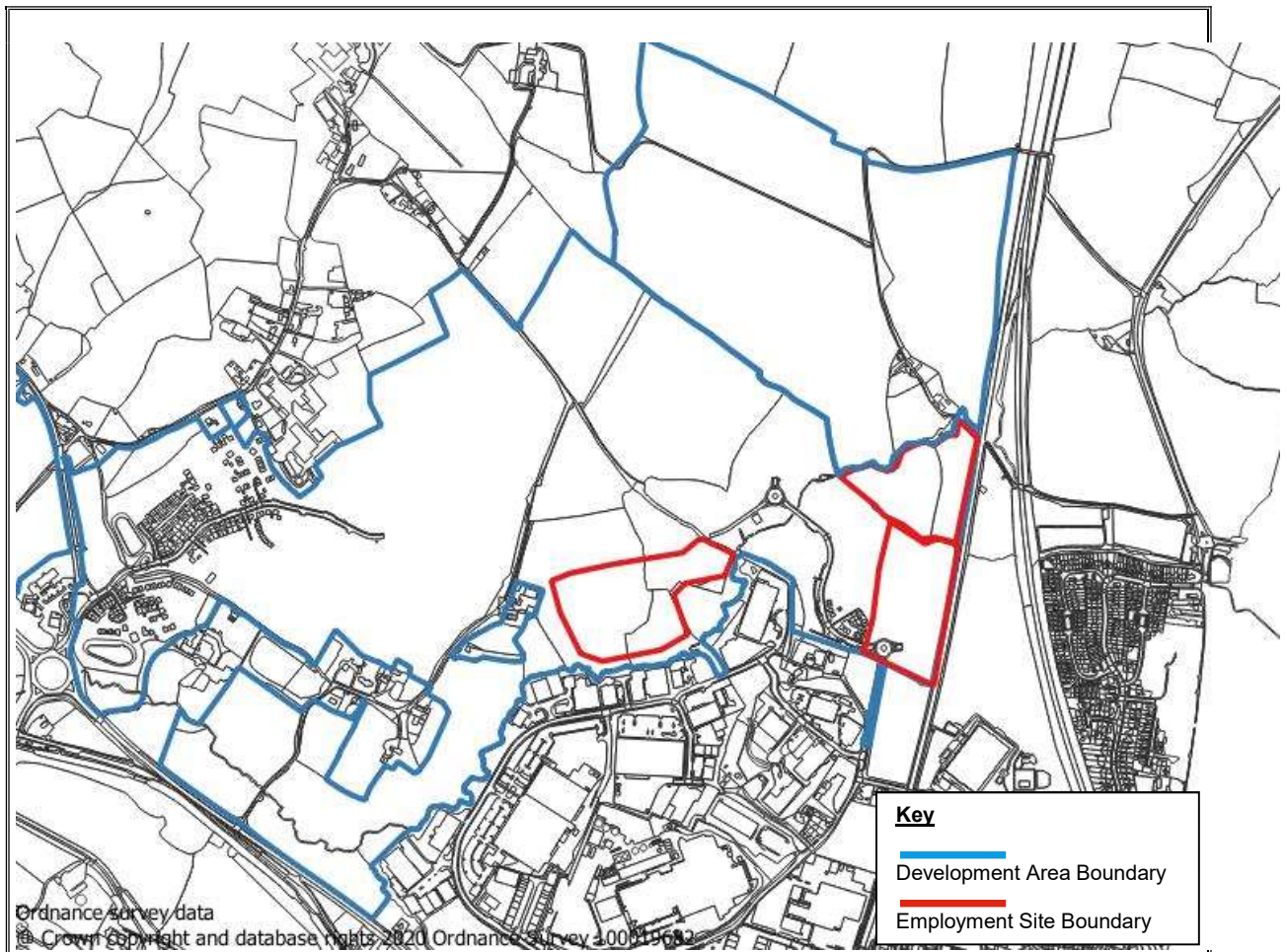
| Site Name | Size (ha) | Site Location and Access | | | | Growth Prospects | Site Conditions | | | | Critical Mass | Total |
|---|-----------|--------------------------|------------|------------------|-----------------|------------------|-----------------------|-------------|-----------------------|-------------|---------------|-------|
| | | Location | Prominence | Public Transport | Sequential test | | Services Availability | Constraints | Environmental Setting | Flexibility | | |
| EK1 Berkeley Rigestate, Station Road | 0.96 | 4 | 6 | 5 | 3 | 8 | 10 | 4 | 4 | 2 | 4 | 50 |
| EK3 Brimscombe & Thrupp Griffin Mills Industrial Estate | 3.50 | 10 | 8 | 5 | 7 | 2 | 10 | 2 | 4 | 2 | 6 | 56 |
| EK4 Brimscombe & Thrupp Hope Mills Industrial Estate | 2.08 | 10 | 2 | 5 | 7 | 0 | 10 | 2 | 4 | 2 | 5 | 47 |
| EK5 Brimscombe & Thrupp Phoenix Industrial Estate | 5.18 | 10 | 8 | 5 | 10 | 4 | 10 | 4 | 6 | 6 | 7 | 70 |
| EK6 Cam Draycott / Middle Mill Industrial Estate | 21.94 | 0 | 7 | 10 | 7 | 3 | 10 | 6 | 5 | 6 | 8 | 62 |
| EK7 Cam Cam Mills, Everlands | 2.25 | 0 | 5 | 5 | 10 | 0 | 10 | 6 | 4 | 3 | 1 | 44 |
| EK8 Chalford Chalford Industrial Estate | 3.62 | 10 | 7 | 5 | 7 | 0 | 10 | 2 | 3 | 2 | 5 | 51 |
| EK9 Dursley Littlecombe Business Park | 3.78 | 3 | 3 | 5 | 10 | 8 | 10 | 6 | 10 | 8 | 6 | 69 |
| EK10 Eastington Meadow Mill Industrial Estate | 4.10 | 8 | 2 | 5 | 7 | 0 | 10 | 2 | 4 | 6 | 1 | 45 |
| EK11 Frampton on Severn Frampton Industrial Estate | 2.89 | 4 | 2 | 5 | 7 | 0 | 10 | 4 | 3 | 2 | 1 | 38 |
| EK12 Hardwicke Quedgeley West | 12.70 | 10 | 8 | 5 | 7 | 3 | 10 | 8 | 10 | 5 | 8 | 74 |
| EK13 Hardwicke Hunts Grove/Quadrant DistributionCentre | 23.09 | 10 | 7 | 5 | 10 | 3 | 10 | 8 | 10 | 8 | 9 | 80 |
| EK14 Haresfield Javelin Park | 11.23 | 10 | 6 | 5 | 3 | 10 | 10 | 10 | 6 | 9 | 1 | 70 |
| EK15 Haresfield Quedgeley Trading Estate East | 22.63 | 10 | 10 | 5 | 3 | 10 | 10 | 8 | 10 | 10 | 6 | 82 |
| EK16 Hinton Severn Distribution Park | 16.35 | 0 | 5 | 0 | 3 | 10 | 10 | 4 | 8 | 9 | 6 | 55 |
| EK17 Kingswood Renishaw New Mills | 8.91 | 0 | 6 | 5 | 3 | 10 | 10 | 6 | 10 | 8 | 1 | 59 |
| EK18 Kingswood Renishaw Charfield Works | 1.42 | 1 | 6 | 5 | 7 | 2 | 10 | 6 | 7 | 5 | 1 | 50 |
| EK19 Kingswood Abbey Mill Industrial Area | 2.33 | 0 | 3 | 5 | 7 | 8 | 10 | 4 | 4 | 4 | 5 | 50 |
| EK20 Kingswood Orchestra Works | 0.73 | 0 | 0 | 5 | 7 | 0 | 10 | 4 | 2 | 2 | 0 | 30 |
| EK21 Minchinhampton Aston Down | 22.04 | 9 | 4 | 5 | 3 | 10 | 10 | 4 | 7 | 10 | 8 | 70 |
| EK22 Nailsworth Inchbrook Industrial Estate | 8.64 | 10 | 8 | 5 | 3 | 1 | 10 | 2 | 7 | 7 | 9 | 62 |
| EK23 Nailsworth Nailsworth Mill Industrial Estate | 3.31 | 10 | 7 | 5 | 7 | 0 | 10 | 0 | 9 | 5 | 6 | 59 |
| EK24 Nailsworth Spring Mill Industrial Estate | 2.37 | 8 | 6 | 5 | 3 | 3 | 10 | 2 | 9 | 4 | 5 | 55 |
| EK25 Rodborough Bath Road Industrial Estate | 6.40 | 10 | 8 | 5 | 10 | 4 | 10 | 2 | 6 | 7 | 8 | 70 |
| EK26 Stonehouse Stroudwater Industrial Estate | 60.53 | 10 | 8 | 10 | 7 | 10 | 10 | 4 | 10 | 10 | 10 | 89 |
| EK27 Stonehouse Stonehouse Park | 5.04 | 10 | 8 | 10 | 7 | 10 | 10 | 4 | 10 | 7 | 6 | 82 |
| EK28 Stonehouse Bonds Mill Industrial Estate | 3.32 | 10 | 8 | 10 | 7 | 8 | 10 | 0 | 7 | 3 | 6 | 69 |
| EK29 Stonehouse Upper Mills Industrial Estate | 2.47 | 10 | 8 | 10 | 7 | 2 | 10 | 2 | 5 | 3 | 5 | 62 |
| EK30 Stonehouse Ryeford Industrial Area | 5.70 | 10 | 10 | 10 | 7 | 6 | 10 | 0 | 3 | 6 | 6 | 68 |
| EK31 Stroud Fromeside Industrial Estate | 1.36 | 10 | 8 | 10 | 10 | 0 | 10 | 6 | 5 | 4 | 6 | 69 |
| EK32 Stroud Salmon Springs Industrial Estate | 2.07 | 10 | 8 | 10 | 3 | 4 | 10 | 2 | 8 | 4 | 4 | 63 |
| EK33 Stroud New Mills/Libby Drive | 1.58 | 8 | 2 | 10 | 7 | 6 | 10 | 4 | 4 | 4 | 5 | 60 |
| EK34 Woodchester South Woodchester Industrial Area | 3.18 | 10 | 8 | 5 | 7 | 6 | 10 | 0 | 8 | 6 | 6 | 66 |
| EK35 Woodchester Frogmarsh Mill Industrial Area | 1.14 | 10 | 8 | 5 | 3 | 2 | 10 | 0 | 8 | 2 | 2 | 50 |
| EK36 Wotton under Edge Tabernacle Road | 0.52 | 0 | 2 | 5 | 10 | 3 | 10 | 6 | 7 | 3 | 5 | 51 |
| EK37 Wotton under Edge Renishaw Old Town | 0.57 | 0 | 4 | 5 | 10 | 1 | 10 | 4 | 7 | 2 | 1 | 44 |
| ER1 Brimscombe & Thrupp Brimscombe Port Industrial Estate | 4.20 | 10 | 8 | 5 | 10 | 10 | 10 | 0 | 8 | 7 | 5 | 73 |
| ER2 Brimscombe & Thrupp Brimscombe Mills | 3.11 | 10 | 8 | 5 | 10 | 10 | 10 | 0 | 4 | 5 | 2 | 64 |
| ER3 Brimscombe & Thrupp Ham Mills | 2.02 | 10 | 8 | 5 | 7 | 10 | 10 | 2 | 2 | 3 | 0 | 57 |
| ER4 Minchinhampton Wimberley Mills and Dockyard Works | 6.46 | 10 | 8 | 5 | 3 | 0 | 10 | 2 | 4 | 2 | 1 | 45 |
| ER5 Cainscross Dudbridge Industrial Estate | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| ER6 Cam Coaley Junction Industrial Estate | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| ER7 Rodborough Daniels Industrial Estate | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| ER8 Stroud Stafford Mills Industrial Estate | 1.71 | 10 | 8 | 10 | 3 | 3 | 10 | 4 | 5 | 3 | 5 | 61 |
| ER9 Stroud Lodgemore & Fromehall Mills | 6.53 | 10 | 7 | 10 | 10 | 4 | 10 | 0 | 4 | 5 | 5 | 65 |
| Former Berkeley Power Station | 31.89 | 0 | 4 | 5 | 3 | 5 | 10 | 0 | 10 | 8 | 10 | 55 |

Appendix 7

Employment Site Proformas

Appendix 7 – Employment Site Proformas

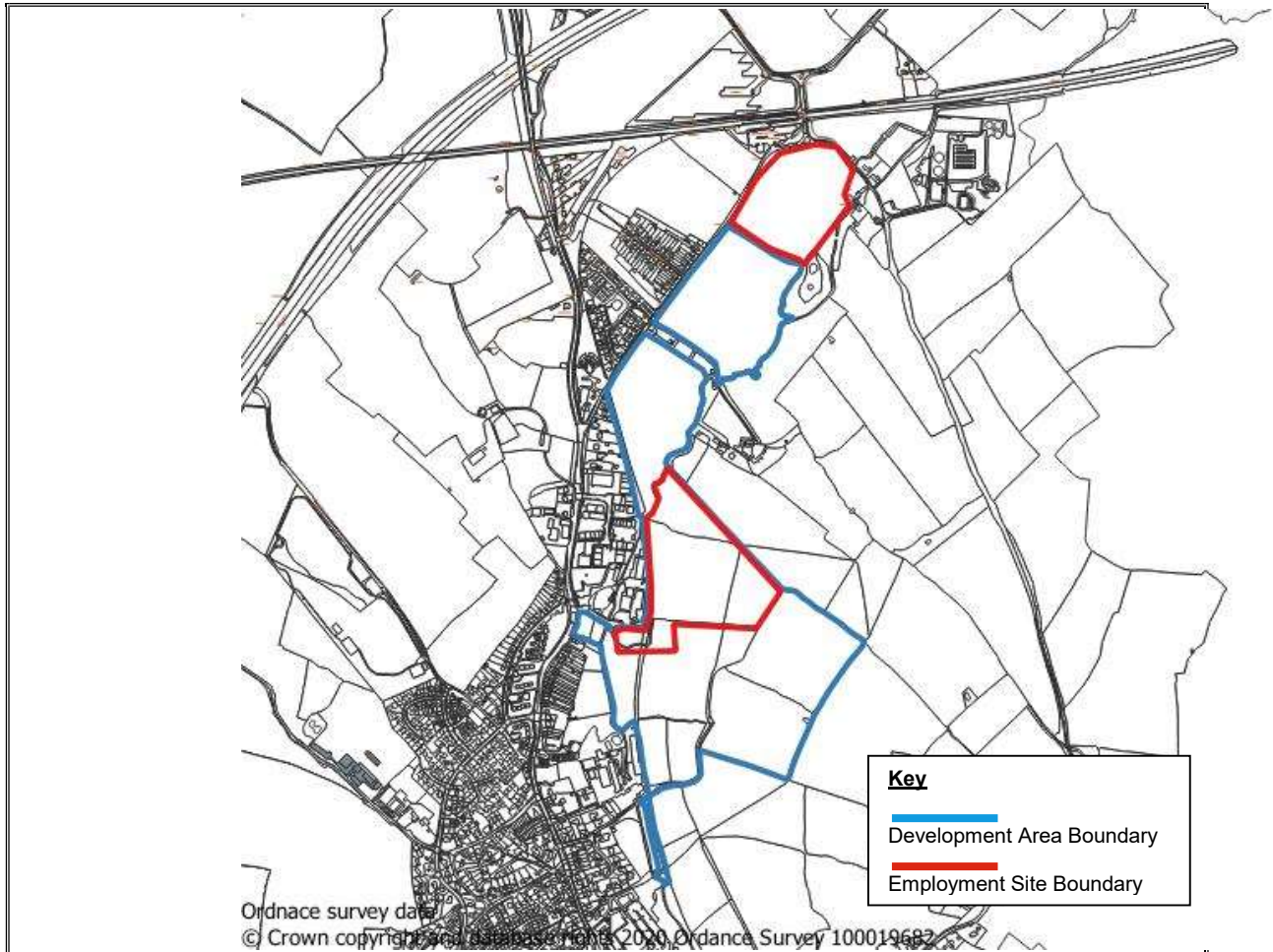
2015 Local Plan Allocations



| | | |
|---|--|--|
| Site reference | SA2 | |
| Name | West of Stonehouse | |
| Brownfield /Greenfield | Greenfield | |
| Owner | Robert Hitchins (Employment land), Stroud District Council (part of site E5) | |
| Description | Five development plots, E1-5, north and north east of Oldends (Stroudwater) Industrial Estate and forming an extension to that estate and falling within the wider Great Oldbury strategic housing site. | |
| Size, ha | 10.00 | |
| Site Development Constraints and Environmental Issues | Some sloping land may not be developable Watercourses pass through some sites Assumed other constraints addressed during planning | |
| Use | Existing | Marketed development land/agricultural |
| | Previous | Agricultural (primarily) |
| Location Type | Urban Fringe | |

| | |
|--|---|
| Accessibility | Main spine roads/access roads for wider Great Oldbury Scheme being delivered |
| Distance to M5 Motorway, km | 3.6 |
| Distance to A-road, km | 1.5 – A419 |
| Distance to Rail Station, km | 3.0 – Stonehouse |
| Distance to Existing Bus Route, km | 0.5 – Oldends Road |
| Distance to Services, km | 0.8 – Various facilities along A419 Bristol Road |
| Adjacent Land Uses | Oldends (Stroudwater) Industrial Estate to the south. Greenfield land, housing developments sites surround elsewhere. |
| Planning Policy Status | Allocated in 2015 Local Plan – Strategic Site SA2 Outline consent for a mixed use development comprising up to 1,350 dwellings and 9.3 ha of employment land; a mixed use local centre comprising use classes primary school, open space and landscaping, parking and supporting infrastructure and utilities; and the creation of new vehicular accesses from Grove Lane, Oldends Lane and Brunel Way (App. No. S.14/0810/OUT). Numerous Reserved Matters consents for access, etc. but not for detailed employment development. |
| Planning Issues | Falls with the New Local Centre (West of Stonehouse) – Policies SA2, CP4, CP12 Employment Area EK26 - Stroudwater Industrial Estate to the south – Policy EI1 |
| Development Status | Redrow progressing the Great Oldbury Housing scheme. Hitchins retain control of the employment plots. Currently marketing Plot E4 as Stroudwater 19, 2.43 ha at the end of Oldends Lane. Proposed for two buildings of 1,858 sqm (under offer) and 4,645 sqm as design and build options. Need to seek Reserved Matters consent. Hoping to develop in 2020/21. Then intend to develop E5, another 2.43 ha to the north, which would be opened up by the E4 development and accessed through it. Partly owned by Stroud Council. Plan would be for 2-3 units of 2,787 sqm each. E1-3 would then follow in 2022 plus. Overall, have Outline consent for 35,000 sqm of E/B-Class space. |
| Serviced | No |
| Market availability | Available |
| Likely development potential/Market Need Met | Industrial– B2/B8 <i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse.</i> <i>Meeting needs for larger offices in the Stonehouse area.</i> Good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 1,858 sqm plus with rents of £7-7.50/sqft (£75-81/sqm) being achieved. |

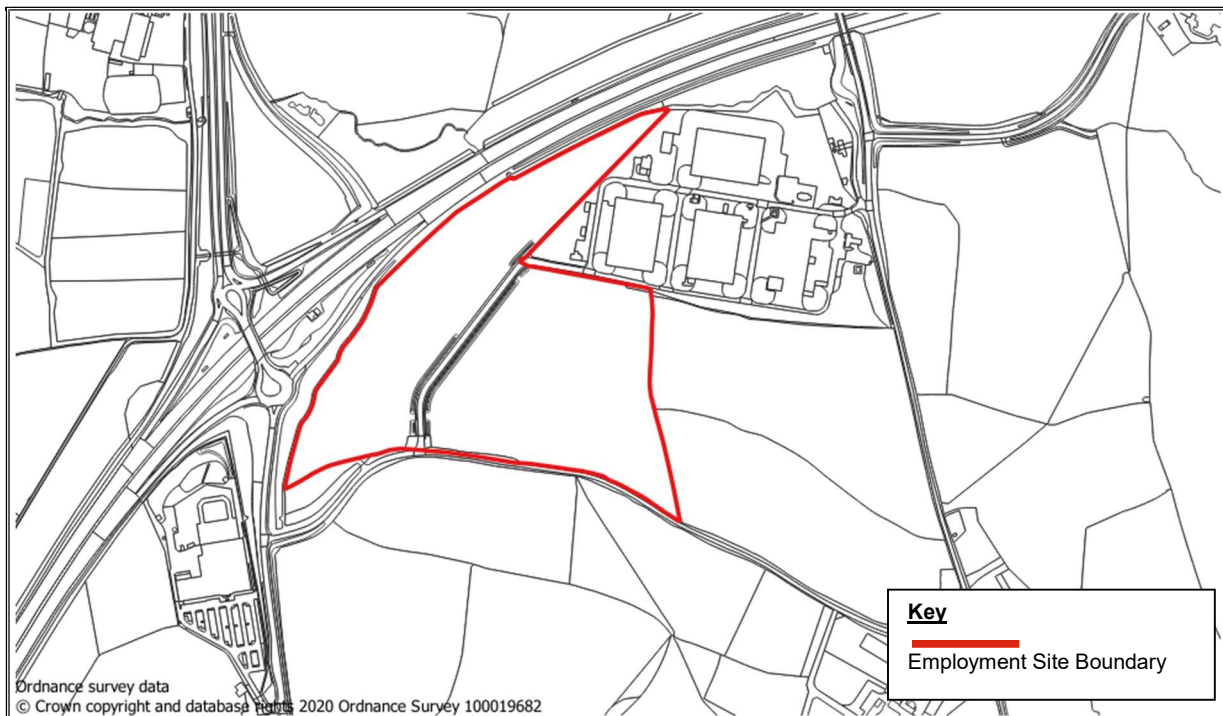
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| Availability, years | 1-5 |
| <i>Scoring</i> | <i>64</i> |



| | | |
|---|---|--|
| Site reference | SA3 | |
| Name | North East Cam | |
| Brownfield /Greenfield | Greenfield | |
| Owner | Bathurst | |
| Description | Large mixed-use development site, on greenfield agricultural land north east of the Cam Settlement area. Comprises ten development plots, three along Box Road, seven east of Draycott/Middle Mills Industrial Estate and separated from the town by the River Cam. Two plots are proposed for employment uses – E1, off Box Road, and E2, east of Draycott/Middle Mills Industrial Estate. | |
| Size, ha | 10.72 in two plots (Reduced from 11.40 ha): | |
| | <ul style="list-style-type: none"> • Site E1 – 4.17 ha • Site E2 – 6.55 ha | |
| Site Development Constraints and Environmental Issues | <ul style="list-style-type: none"> • E1 – Close to sewage works • E2 – Inaccessible without bridge over the River Cam. Partly in flood risk area, Flood Zone 3. | |
| Use | Existing | Agricultural (Plot H1 under development for housing) |
| | Previous | Agricultural |
| Location Type | Urban Fringe | |

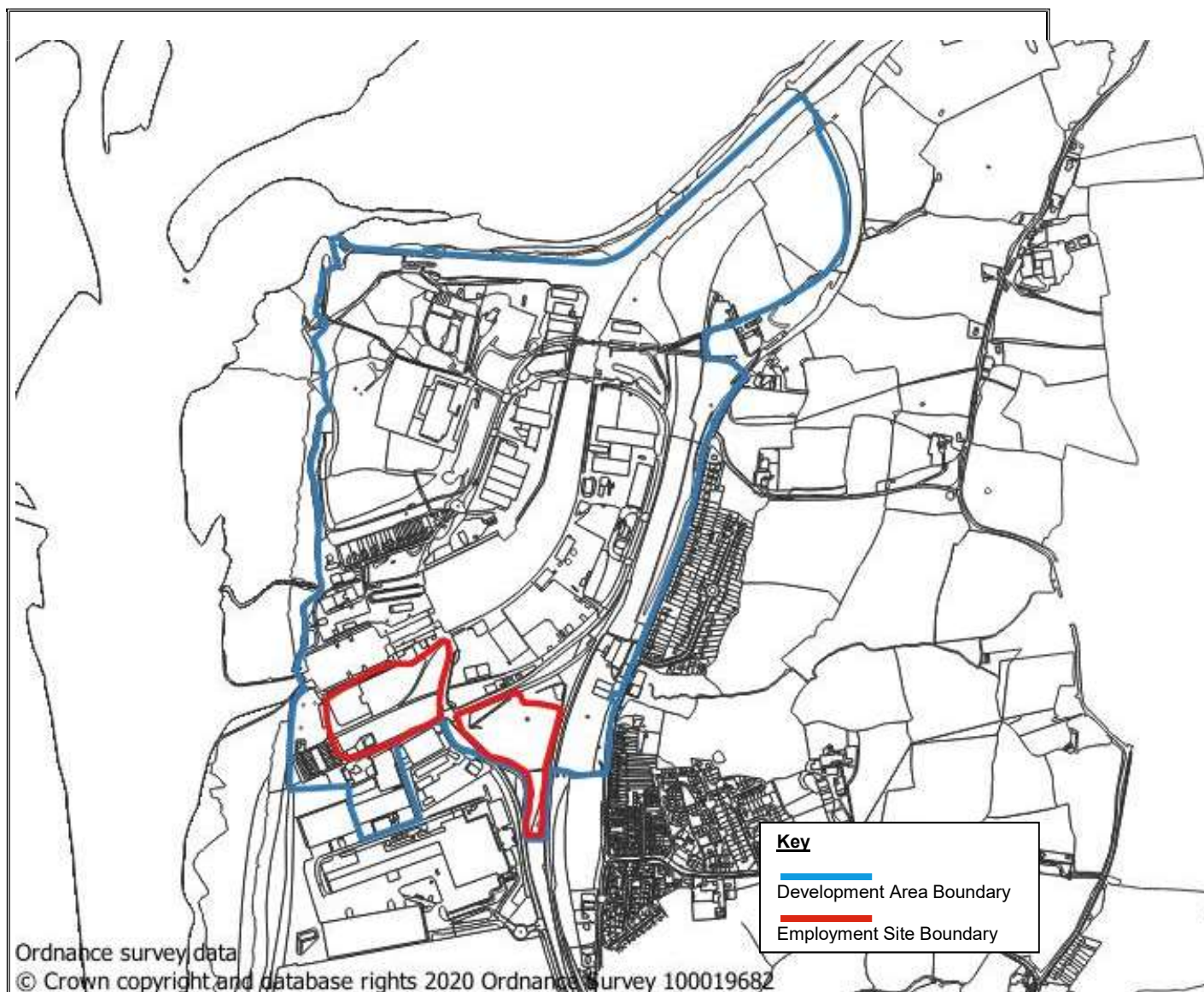
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| Accessibility | <ul style="list-style-type: none"> • Site E1 – Unconstrained access onto Box Road. Adjacent to Cam Railway Station • Site E2 – The wider area of sites E2 and H3-8 requires a new access road off Draycott Road and a bridge over the River Cam at a cost of £2 million. Owner sought reserved matters consent for this (App. No. S.19/0758/REM), but no determination was made on the application, so it went to appeal (Ref. No. S.20/013/APPND). Stroud Council have not sought to contest the appeal so the owner assumes that consent can be secured within 3 months. The plan is then to pay for this by selling Sites H3-4 to a housebuilder, with an appropriate discount, in exchange for the housebuilder delivering the access. |
| Distance to M5 Motorway, km | 7.3 |
| Distance to A-road, km | 0.1 – Sites off the A4135, subject to access being secured |
| Distance to Rail Station, km | E1 – Adjacent to Cam Station |
| Distance to Existing Bus Route, km | 0.1 – A4135 |
| Distance to Services, km | 0.7 – Cam High Street |
| Adjacent Land Uses | <ul style="list-style-type: none"> • E1 – Cam Railway Station to the north. Coaley Sewage Treatment Works to the east. Housing development site to the west/south west (Site H2). Agricultural land to the south • E2 – Draycott/Middle Mill Industrial Estate and River Cam to the west. Agricultural land and housing development sites elsewhere |
| Planning Policy Status | <p>2015 Local Plan Allocation – SA3</p> <p>Outline Consent for a mixed use development of up to 450 dwellings, 10.7 ha of employment land with associated parking and servicing; open space and landscaping including riverside park; flood storage ponds and infrastructure; creation of new vehicular accesses to Draycott (A4135) and Box Road and supporting infrastructure and utilities (App. No. S.15/2804/OUT).</p> <ul style="list-style-type: none"> • Site E1 – Consent for 14,500 sqm of floorspace • Site E2 – Consent for 20,165 sqm of floorspace. |
| Planning Issues | Employment Area EK6 - Draycott / Middle Mill Industrial Estate to the west – Policy E11 |
| Development Status | <ul style="list-style-type: none"> • Site E1 – Owner was planning to tender for a commercial development partner last spring but Covid-19 has delayed that. Will now go to the market in early 2021. • Site E2 – A new access across the River Cam will open up E2, which can then be marketed, as E1 will be. Assume a 2-3 year window before E2 is accessed and can be brought to the market. |
| Serviced | No |
| Market availability | Available (partly) |
| Likely development potential/Market Need Met | Industrial/office – B1/B2/B8 <i>Local scale expansion</i> |

| | |
|---------------------|--|
| | <p>This is the main development option for Cam/Dursley, towns with a sizable local business base. Also close to M5. While the outline application was being agreed, the owner received several enquiries from local firms, looking for sites of around 0.4 ha. Mostly for storage or low grade industrial, but also some enquiries for higher value manufacturing and one for a large office.</p> <p>However, the owner does not want to see a low value, piecemeal development here, rather is looking for more comprehensive scheme of industrial or office uses.</p> <p>The recent experience of marketing new build industrial units at Littlecombe Business Park suggests that there is good local demand for freehold industrial units of up to 230 sqm, from mostly local firms.</p> <p>The local office market is largely limited to small Town Centre suites, with no evidence of strong demand for a large new office scheme in Cam/Dursley. Stonehouse, plus Stroud Town Centre, is the identified centre of the District's office market, with an existing B1(a) cluster and prospects for further growth.</p> |
| Availability, years | 1-5 |
| <i>Scoring</i> | 69 |



| | | |
|---|----------|--|
| Site reference | | SA4a |
| Name | | Quedgeley East (SA4a) |
| Brownfield /Greenfield | | Mixed |
| Owner | | St Modwen |
| Description | | Mostly greenfield land, south east of Junction 12, M5. Under development as new build industrial/warehouse park, St Modwen Park, with three units completed to date. |
| Size, ha | | Originally 13.0, 8.50 ha undeveloped at time of Study |
| Site Development Constraints and Environmental Issues | | Substation on the site. |
| Use | Existing | Industrial/warehouse park under development |
| | Previous | Mostly agricultural land |
| Location Type | | Rural |
| Accessibility | | <p>Almost immediate access to Junction 12, M5. St Modwen are undertaking improvements to the B4008 Gloucester Road.</p> <p>With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which</p> |

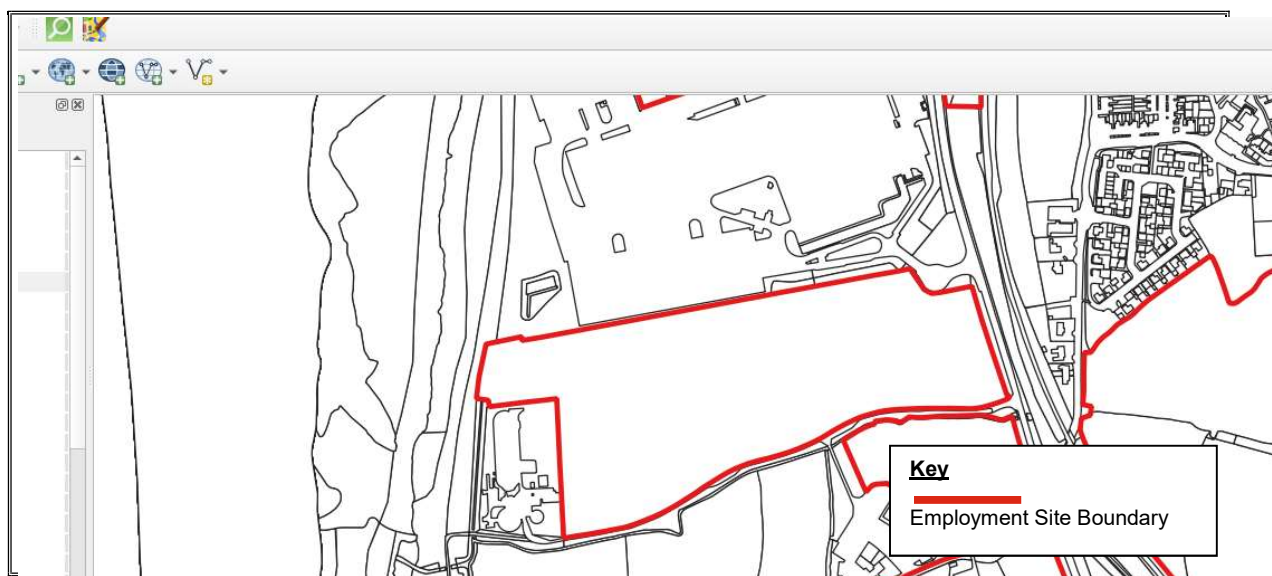
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| | is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes. |
| Distance to M5 Motorway, km | 0.2 |
| Distance to A-road, km | 1.1 – A38 |
| Distance to Rail Station, km | 5.8 - Stonehouse |
| Distance to Existing Bus Route, km | 1.1 – A38 |
| Distance to Services, km | 0.1 – Blooms Garden Centre/Cafe |
| Adjacent Land Uses | M5 to the north Quedgeley Trading Estate to the north east Agriculture to east and south |
| Planning Policy Status | 2015 Local Plan Allocation – Strategic Site SA4a Consent secured for 86,000 sqm of new B2/B8 floorspace, including the redevelopment of the existing Trading Estate (App. No. S.16/1724/OUT) |
| Planning Issues | EK15 - Quedgeley Trading Estate to the north east - Policy E1 |
| Development Status | Delivery Timetable: <ul style="list-style-type: none"> • 2019 Three units delivered of 4,181-6,782 sqm. One let to Aday, one under offer. • 2021 Four more units to be delivered west of the access road. 16,700 sqm total. • 2022 delivery of a large unit of 10,777 sqm plus another of 5,574 sqm, east of the access road • 2023-24 Redevelopment of the Trading Estate for 28,000 sqm of new space. |
| Serviced | Yes |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial – B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire market</i> Site in very strong location immediately off the M5, close to the A38 and around 2.5 km from the edge of Gloucester. Established area for larger B2/B8 units, St Modwen has been delivering space here since 2006, first at Quedgeley West, then at Hunts Grove. Managed to deliver/let one unit a year even in the recession. Demand from regional/national businesses, most with an existing Gloucester presence. Mid-box units of 2,000-5,000 sqm are in demand. Achieved rents are £6.75/sqft (£72/sqm). Intend to go to £6.95/sqft (£74/sqm) in the next phases to reflect increased construction costs. Ultimately aiming for £7/sqft (£75/sqm) which is still cheaper than equivalent rents in Bristol - £7.50/sqft (£81/sqm). |
| Availability, years | 0-1 |
| Scoring | 79 |



| | |
|---|---|
| Site reference | SA5 |
| Name | Sharpness Docks |
| Brownfield /Greenfield | Mixed |
| Owner | Canal and River Trust |
| Description | Area comprises two parcels of undeveloped land north west and south east of the southern entrance to the Docks, off the B4066 and close to Severn Distribution Park |
| Size, ha | 6.60 – new development area for which consent is being sought |
| Site Development Constraints and Environmental Issues | RAMSAR site Existing Docks is HSE Consultation Site Some old rail infrastructure on north west site North west site partly in Flood Risk area, Flood Zone 2 Trees on both sites Severn Way footpath crosses the south east site South east site irregularly shaped in the south |

| | | |
|--|----------|--|
| Use | Existing | Vacant |
| | Previous | Dock railway/infrastructure |
| Location Type | | Rural |
| Accessibility | | Access for the E/B-Class space will be off existing estate roads. Some ongoing questions about the strategic road contributions required for the larger scheme. |
| Distance to M5 Motorway, km | | 18.4 |
| Distance to A-road, km | | 4.8 |
| Distance to Rail Station, km | | 12.4 – Cam/Dursley. Freight only station at Sharpness |
| Distance to Existing Bus Route, km | | 0.3 – Saniger Lane, Sharpness |
| Distance to Services, km | | 0.4 – Sharpness Village |
| Adjacent Land Uses | | Existing dock infrastructure and businesses bound the sites in most directions. Severn Distribution Pak to the south west. The Sharpness Railway line to the south east. |
| Planning Policy Status | | Strategic Allocation SA5 in the Adopted Local Plan Canal and River Trust have been seeking Outline planning consent for the last three years (App. No S.17/0798/OUT) for a larger mixed-use development, including housing, a hotel, retail, greenspace and employment uses. Are understood to be close to a consent. |
| Planning Issues | | Employment Area EK16 - Severn Distribution Park to the south west – Policy EI1 |
| Development Status | | Consent being sought for 12,000 sqm of E(g), B2, B8 industrial floorspace and 7,000 sqm of E(g) (i) office or light industrial use as part of a larger scheme. Assuming consent, the owners will look to develop the scheme over a 10 year timeframe, with the employment later on in the period. Canal and River Trust have not tendered for development partners yet, have been awaiting consent. The delivery of E/B-Class uses does not appear a strong priority for the owner. |
| Serviced | | No |
| Market availability | | Not Available |
| Likely development potential/Market Need Met | | Industrial – B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i> <i>Local scale expansion of established Employment Area.</i> Employment land links well to Severn Distribution Park, an established logistics facility, with its own growth plans. In rural area but with reasonable main road access. Canal and River Trust are sceptical about what demand exists for this use and in such an isolated location. Not seeing demand from existing tenants. However, have not done any market testing yet, not consulted with occupiers or talked to those promoting the other schemes in Sharpness. |

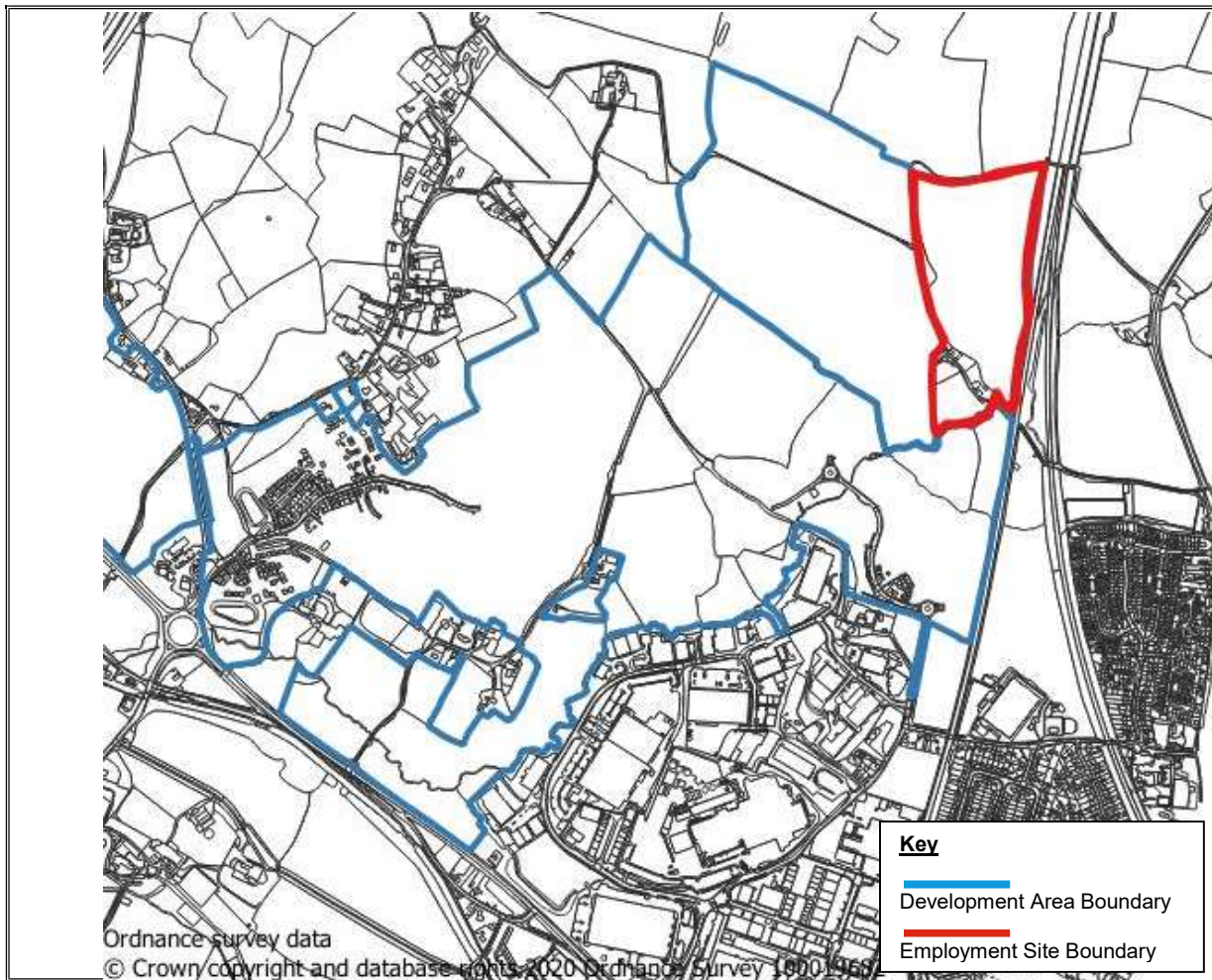
| | |
|---------------------|---|
| | The south east site includes a rail head. Proposal from Sharpness Steam Heritage Railway for heritage facilities/engine sheds here. |
| Availability, years | 10+ |
| <i>Scoring</i> | 34 |



| | | |
|---|--|------------------|
| Site reference | SA5a | |
| Name | South of Severn Distribution Park | |
| Brownfield /Greenfield | Mixed | |
| Owner | Howard Tenens | |
| Description | Rectangular expansion site for Severn Distribution Park, south of the existing Park and sharing an access east onto the B4066. The land has been cleared, at least in part, for development. | |
| Size, ha | 9.80 | |
| Site Development Constraints and Environmental Issues | RAMSAR site Partly in flood risk area, Zones 2-3 Water treatment plant to the west | |
| Use | Existing | Development site |
| | Previous | Agricultural |
| Location Type | Rural | |
| Accessibility | Site has access onto the B4066 via an existing roundabout and junction, which form part of the access infrastructure of Severn Distribution Park | |
| Distance to M5 Motorway, km | 18.3 | |
| Distance to A-road, km | 4.7 | |
| Distance to Rail Station, km | 12.3 – Cam/Dursley. Freight only station at Sharpness | |
| Distance to Existing Bus Route, km | 0.3 – Saniger Lane, Sharpness | |
| Distance to Services, km | 0.4 – Sharpness Village | |
| Adjacent Land Uses | Existing Severn Distribution Park to the north. Water Treatment Plan and Severn River to the west. Agriculture to the south. B4066 and Sharpness settlement to the east. | |
| Planning Policy Status | Strategic Allocation SA5a in the adopted 2015 Local Plan Site has Outline and Reserved Matters consent (App. No. S.13/2153/OUT) for the erection of two buildings | |

| | |
|--|---|
| | for light industrial/storage and distribution purposes. |
| Planning Issues | Employment Area EK16 - Severn Distribution Park to the north – Policy E11 |
| Development Status | Consented for 46,400 sqm of primarily B8 Space. Long term proposal to meet the growth needs of a Gloucestershire Company that wants to combine three facilities together here. Site appears cleared and it is understood that development is underway. |
| Serviced | Partly |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial –B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire market</i> Identified growth option now under development to meet specific occupier needs. Despite distance from the M5, Severn Distribution Park has established itself as a key element of the sub-regional and regional logistics market attracting companies from across the county and beyond. |
| Availability, years | 0-1 |
| Scoring | 61 |

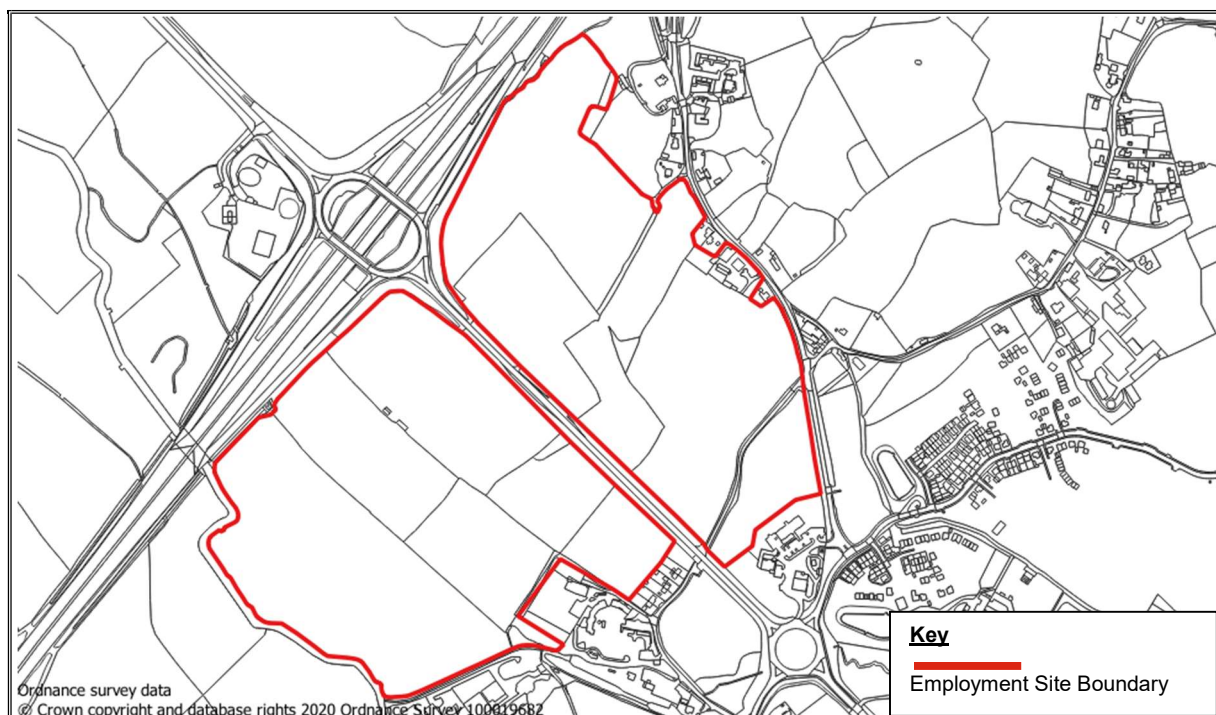
2019 Draft Local Plan, Proposed Strategic Employment Sites



| | |
|---|--|
| Site reference | PS19a |
| Name | North West of Stonehouse |
| Brownfield /Greenfield | Greenfield |
| Owner | Mixed ownership including: <ul style="list-style-type: none"> • Two private individuals (local farms) • Gloucestershire County Council Robert Hitchins and Redrow have an option on the County Council land and one of the private ownerships. |
| Description | Large rectangular shaped area of mostly agricultural land, north and east of the Great Oldbury development and west of the railway line. |
| Size, ha | 5.00 |
| Site Development Constraints and Environmental Issues | Two agricultural tenancies on the site Various farm buildings on the site Trees onsite Ecological assessments have still to be completed, but it is assumed that buffers will be required round the site, to the north and east. |

| | | |
|--|----------|--|
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | | Urban Fringe |
| Accessibility | | Robert Hitchins have identified that an access to the employment element will be provided through employment sites E4 and E5 within the Great Oldbury scheme (SA2: West of Stonehouse) and then onto the Great Oldbury spine roads currently being developed. However, no agreements have been reached as to how that access will be delivered, by whom and how it will be funded. |
| Distance to M5 Motorway, km | | 3.6 |
| Distance to A-road, km | | 1.5 – A419 |
| Distance to Rail Station, km | | 3.0 – Stonehouse |
| Distance to Existing Bus Route, km | | 0.5 – Oldends Road |
| Distance to Services, km | | 0.8 – Various facilities along A419 Bristol Road |
| Adjacent Land Uses | | The Great Oldbury development area to the south and west. Agricultural land to the north. Railway line to the east. |
| Planning Policy Status | | Proposed allocation in a Draft Local Plan |
| Planning Issues | | Local Centre (West of Stonehouse) to the south and west – Policies SA2, CP4, CP12 |
| Development Status | | <p>The land is landlocked and only accessible through Robert Hitchins ownerships to the south, the Great Oldbury new settlement (Plots E4/5, which are being brought forward). Thus, there is a need for the Oldbury/PS19a sites to be developed collectively. However, this has not been formally agreed, nor has an agreement on access been reached at this time.</p> <p>The County Council feel that Hitchins/Redrow intend for most of the extra 5 ha of employment will fall onto GCC land rather than apportioning it out in a development agreement, a point of contention between the two parties.</p> <p>Development plans still at an early stage however, no timetable set, no agreement on scale/type of uses, etc. The assumption is that Redrow/Hitchins will develop the County Council land alongside that of other parties although this has not been formally agreed.</p> <p>Progress has stalled though the Covid-19 crisis, but the County Council is now looking to resume discussions through agents Alder King. Ultimately, however, development on PS19a unlikely till a substantial portion of Great Oldbury is developed, likely a 5-10 year timeframe.</p> |
| Serviced | | No |
| Market availability | | Not Available |
| Likely development potential/Market Need Met | | Industrial– B2/B8 <i>Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses, including</i> |

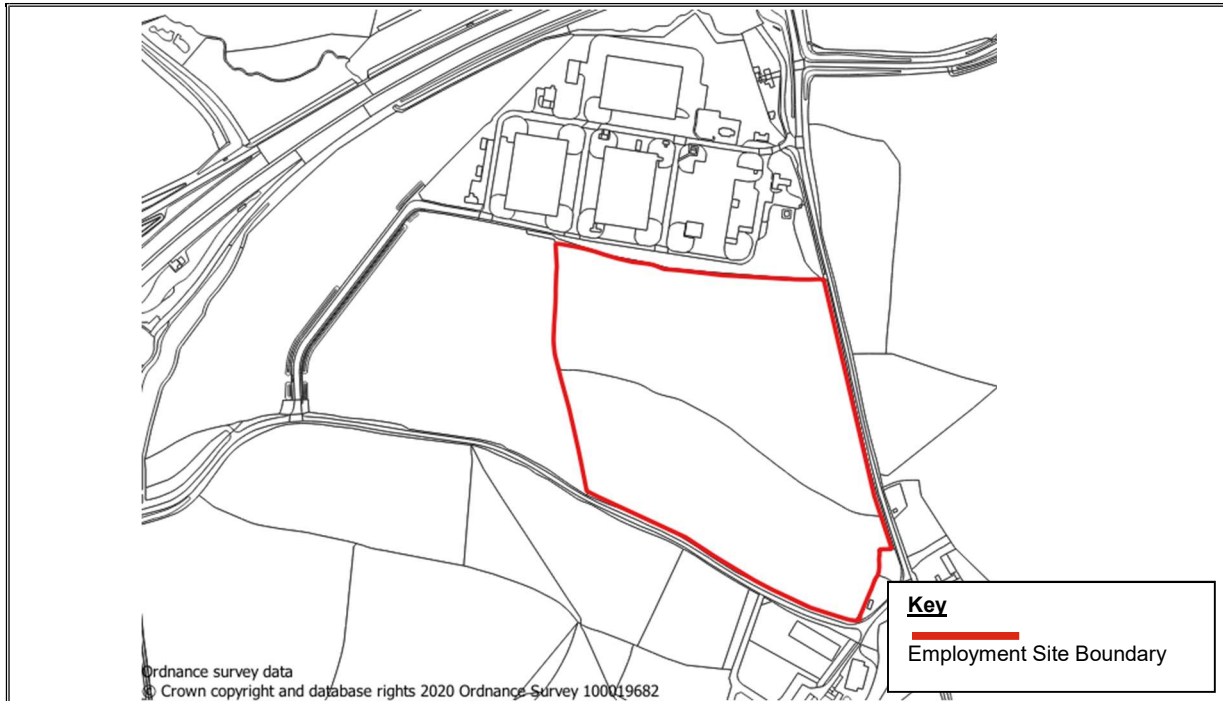
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| | <p><i>allowing expansion of the major industrial estate to the south.</i></p> <p><i>Meeting needs for larger offices in the Stonehouse area.</i></p> <p>It is assumed that this land will represent a further expansion option for the Oldends Industrial Estate to the south, continuing the momentum already underway as the West of Stonehouse sites are brought forward.</p> <p>The West of Stonehouse sites are seeing good demand from large firms already in Stonehouse/Stroud and attracted by the existing critical mass of firms locally, plus some national businesses. Requirements are for B2 units of 1,858 sqm plus with rents of £7-7.50/sqft (£75-81/sqm) being achieved.</p> |
| Availability, years | 5-10 |
| <i>Scoring</i> | 47 |



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| Site reference | PS20 | |
| Name | M5 Junction 13 | |
| Brownfield /Greenfield | Greenfield | |
| Owner | Ecotricity Group (primarily) | |
| Description | Two areas of greenfield agricultural land, north and south of the A419, to the immediate south east of Junction 13, M5 | |
| Size, ha | 10.00 overall, although any scheme will focus on the 8.00 owned by Ecotricity first | |
| Site Development Constraints and Environmental Issues | <p>North of A419, the focus for E/B-Class use, is unconstrained</p> <p>Southern site is partly in Flood Risk Area, Flood Zone 3. Main river, River Frome to the south</p> <p>Southern site also partly in a Conservation Area, associated with the Stroudwater Navigation</p> | |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | Rural | |
| Accessibility | Details to be agreed, but access via new junction of A419 | |
| Distance to M5 Motorway, km | 0.2 | |
| Distance to A-road, km | 0 – Off the A419 | |
| Distance to Rail Station, km | 3.5 – Stonehouse Station | |
| Distance to Existing Bus Route, km | 0 – A419 | |
| Distance to Services, km | 1.0 – Various services along the A419 | |
| Adjacent Land Uses | M5 to the north west. Agricultural and settlement of Westend to the north east. A419 services/Great Oldbury | |

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| | development site/Meadow Mill Industrial Estate to the south east. Agriculture to the south west. |
| Planning Policy Status | Proposed allocation in Draft Local Plan Outline planning consent for non E/B-Class uses |
| Planning Issues | Southern site falls into an Industrial Heritage Conservation Area associated with the Stroudwater Navigation/River Frome – Policy ES10 Proposed cycle route through the southern site – Policy E13 Southern site also adjoins Employment Area EK10 - Meadow Mill Industrial Estate – Policy E11 To the south east is the New Local Centre (West of Stonehouse) – Policies SA2, CP4, CP12 |
| Development Status | <i>Northern Site</i> Early in 2020, Ecotricity Group received Outline consent for a 5,000 capacity football stadium for Forest Green Rangers. This also includes one full-sized grass pitch and one full-sized all-weather pitch and a goal practice area; car parking for 1,700 cars and coaches in the east of the site and highway improvements to A419 including a signalised site junction and combined cycle/footway (App. No. S.19/1418/OUT). Ecotricity now intend to replace much of the car parking with B2/B8 employment, some B1 employment closer to the Stadium, plus a hotel and housing. Some 8.00 ha of employment is proposed. The new employment is put forward as an ‘Eco Park’, with all power generated from green energy, a bike path to Stonehouse/Stroud and bus depot on site. The development would be anchored by Ecotricity which plan to move its R&D and manufacturing facilities onto the site, with the HQ offices staying in Stroud Town. Ecotricity is reworking the area masterplan, in consultation with the Council, and intend to have it issued by September. They intend to submit a planning application prior to the Local Plan Examination in Public in late 2020/early 2021. <i>Southern Site</i> Proposed for leisure/heritage facilities associated with the Canal. The project has Heritage Lottery Funding. Some 8 ha of employment is proposed by Ecotricity in total. Land adjacent to Travelodge (not in Ecotricity ownership) is also being proposed for employment uses and would likely be delivered as a linked scheme although possibly as a later phase, assuming success of the initial scheme. |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial/office – E(g)/B2/B8 <i>Growth of technology sectors, including green businesses</i> <i>Meeting needs for larger offices in the Stonehouse area.</i> |

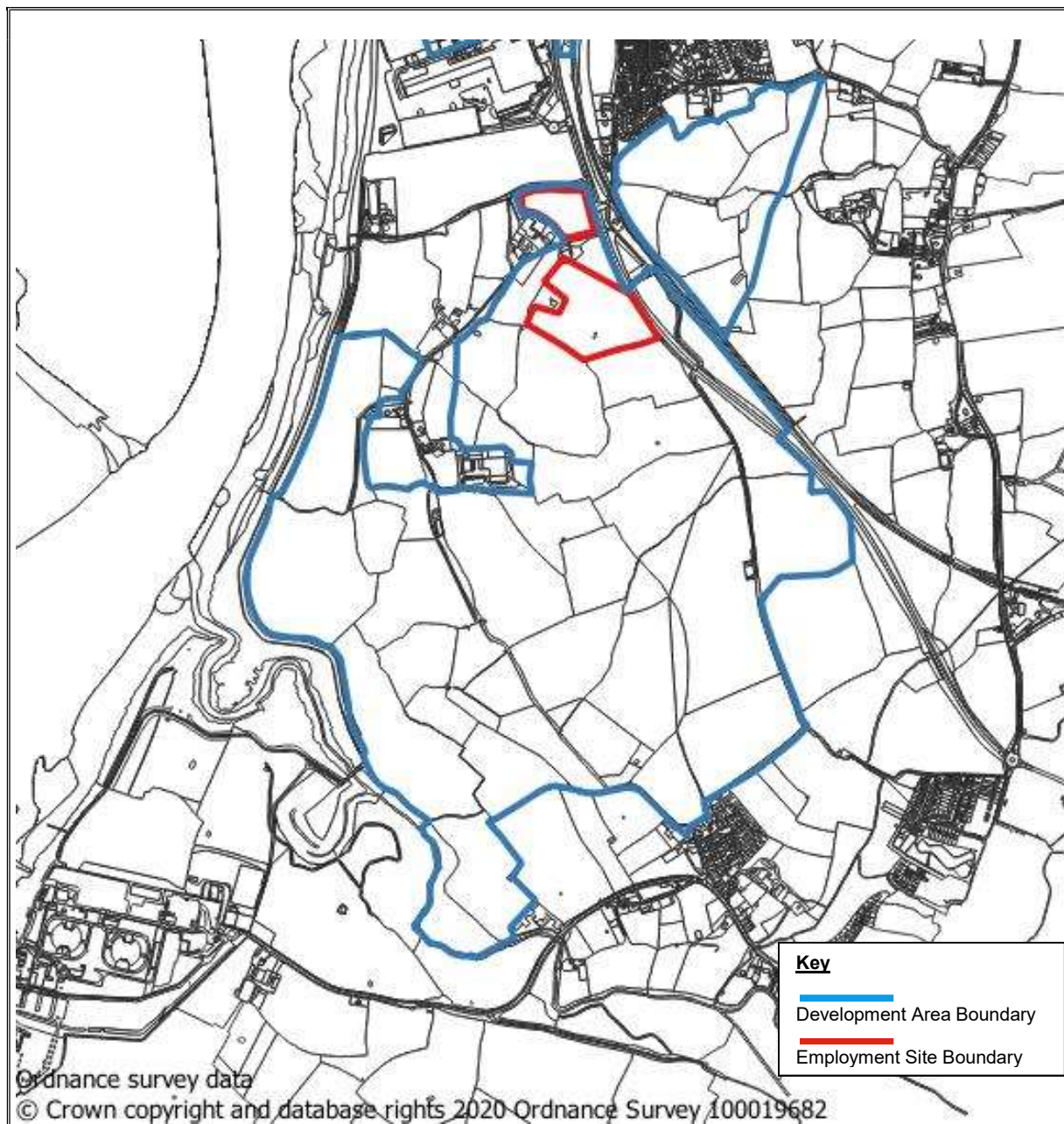
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| | <p>In terms of deliverability, a key factor is Ecotricity's willingness to move a large part of its operations here, anchoring the scheme and helping to attract other businesses in similar fields. It is also assumed that Ecotricity, or a retained agent for Ecotricity, would manage the overall scheme.</p> <p>The company has indicated that it has requirements from several other companies in the Ecotricity supply chain, including firms which manufacture PV Cells, which would wish to locate here. Ecotricity is also willing to drive development forward more generally, working through its agents to secure development partners, seek planning, etc.</p> <p>As is noted in Section 3.0, around a quarter of local businesses (5,969 in 2019) and 13.0 percent of jobs (6,780 in 2018) could be said to fall into 'green' sectors. Overall, there were 53,730 green jobs and 9,270 green businesses in Gloucestershire in 2018/19. Not all of these businesses/jobs are in sectors which will require extensive E/B-Class space, but this still represents a sizable body of companies which could potentially take up space in the Eco Park.</p> <p>In practice, it would not be possible for the Council to limit occupancy on the site only to Green Businesses, that would be for the scheme managers to enforce. However, there seems to be more general demand from technology sectors here. South Gloucestershire and Stroud College, who have a number of collaborative projects with Ecotricity have identified the Eco Park as a preferred destination for companies seeking grow-on space from the Gloucestershire Science and Technology Park, Berkeley in the 700-20,000 sqm size range.</p> <p>Rather the priority should be to ensure high standards of building, services, etc, which meet BEEAM Excellent standards to ensure the 'Eco Park' meets the best standards of environmental quality and sustainability.</p> |
| Availability, years | 1-5 |
| <i>Scoring</i> | 79 |



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|---|----------|---|
| Site reference | | PS32 |
| Name | | Quedgeley East Extension |
| Brownfield /Greenfield | | Greenfield |
| Owner | | Coethrop Farm (St Modwen have an option) |
| Description | | Area of flat agricultural land, east of St Modwen Park (Quedgeley East, SA4a) and south east of Quedgeley Trading Estate |
| Size, ha | | 5.00 |
| Site Development Constraints and Environmental Issues | | Need for extensive ecological mitigation and screening from nearby housing |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | | Rural |
| Accessibility | | <p>Away from the main roads at present, but development of St Modwen Park would provide a route west to the B4008 and Junction 12, M5. Other access options to the south or east although less suited to HGV traffic at present.</p> <p>With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could, under certain circumstances, include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which</p> |

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| | is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes. |
| Distance to M5 Motorway, km | 0.8 |
| Distance to A-road, km | 1.7 – A38 |
| Distance to Rail Station, km | 6.4 - Stonehouse |
| Distance to Existing Bus Route, km | 0.5 – Haresfield |
| Distance to Services, km | 0.6 – Blooms Garden Centre/Cafe |
| Adjacent Land Uses | Quedgeley Trading Estate to the north St Modwen Park to the west Agriculture/farm buildings to east and south |
| Planning Policy Status | Proposed allocation in Draft Local Plan |
| Planning Issues | 2015 Local Plan Allocation – Strategic Site SA4a Quedgeley East, to the west EK15 - Quedgeley Trading Estate to the north - Policy E1 |
| Development Status | St Modwen have an Option, but Colethrop Farm want to promote the site themselves and secure planning. St Modwen is interested in delivering the land post 2024 as a next stage of St Modwen Park, but the key highways constraint would need to be addressed. Although Colethrop Farm accepts that the bulk of the site will be developed for B2/B8 units, by St Modwen, it would like to see land in the south east developed for a facility or units for local firms/start-ups. Feels this would meet a lot of local needs in the surrounding rural area, as well as softening the visual impact of any scheme onto Haresfield Lane in the east. However, Colethrop Farm accepts there has been no market testing of these ideas and no discussions with St Modwen about the future here. |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential | Industrial – B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market.</i> Site in very strong location immediately off the M5, close to the A38 and around 2,5 km from the edge of Gloucester. Established area for larger B2/B8 units, St Modwen has been delivering space here since 2006, first at Quedgeley West, then at Hunts Grove and St Modwen Park. Managed to deliver/let one unit a year even in the recession. Demand from regional/national businesses, most with an existing Gloucester presence. Mid-box units of 2,000-5,000 sqm are in demand. Achieved rents are £6.75/sqft (£72/sqm). Intend to go to £6.95/sqft (£75/sqm) in the next phases to reflect increased construction costs. Ultimately aiming for £7/sqft (£75/sqm) which is still cheaper than equivalent rents in Bristol - £7.50/sqft (£81/sqm). |
| Availability, years | 5-10 |

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| <i>Scoring</i> | 54 |
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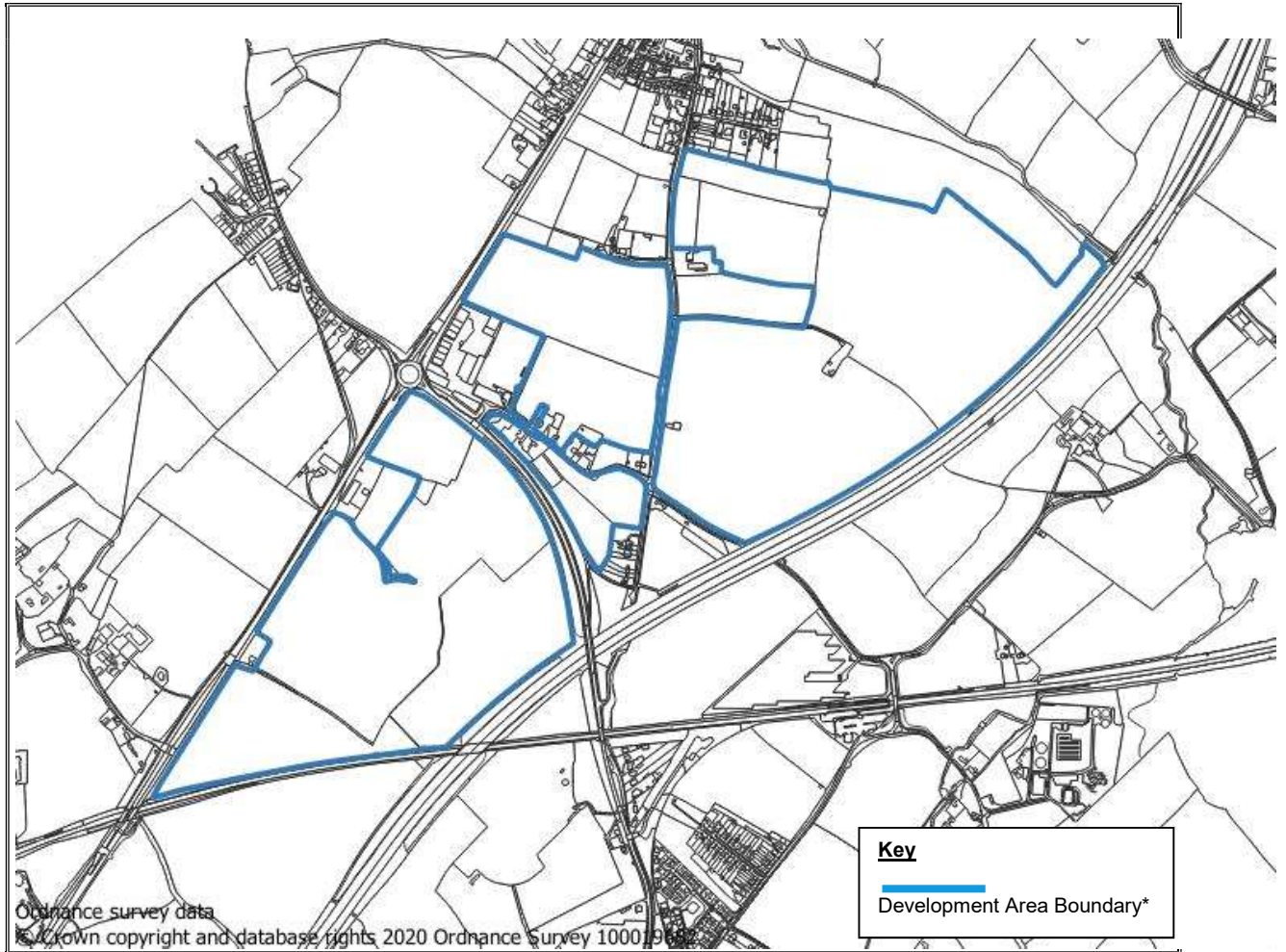


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| Site reference | PS36 |
| Name | New settlement at Sharpness |
| Brownfield /Greenfield | Greenfield (primarily) |
| Owner | Primarily Sanigar Farm (Greensquare and Lioncourt have an Option as Sharpness Development LLP) |
| Description | Broad area of strategic greenfield land, bounded by the River Severn to the west, Sharpness Docks/Severn Distribution Park/Sharpless Village to the north, the railway line to the east and Berkeley Pill watercourse to the south |
| Size, ha | 10.00 |
| Site Development Constraints and Environmental Issues | Ramsar site on River Severn – Environmental buffer proposed Woodland on site, assumed several ecological issues will need to be mitigated |

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| | | South and west is in a flood risk area, Flood Zone 3, albeit with existing flood defences in place |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | | Rural |
| Accessibility | | Road access via enhanced B4066 Rail proposal - Proposed upgrade of an existing freight line, new services and possibly new track will be needed. Will only go to Cam/Dursley, people will then need to change for Gloucester/Bristol. |
| Distance to M5 Motorway, km | | 18.1 |
| Distance to A-road, km | | 4.5 |
| Distance to Rail Station, km | | 12.1 – Cam/Dursley. Freight only station at Sharpness, at present |
| Distance to Existing Bus Route, km | | 0 – B4066 |
| Distance to Services, km | | 0.4 – Sharpness Village, new services created within scheme |
| Adjacent Land Uses | | River Severn to the west, Sharpness Docks/Severn Distribution Park/Sharpless Village to the north, the railway line to the east and Berkeley Pill watercourse to the south |
| Planning Policy Status | | Proposed allocation in a Draft Local Plan |
| Planning Issues | | Strategic Allocation SA5a: South of Severn Distribution Park to the north |
| Development Status | | <p>Sharpness Vale Eco settlement or Sharpness Vale: Natural Neighbourhoods</p> <p>Masterplan developed which proposes:</p> <ul style="list-style-type: none"> • 10 ha employment land • Education Campus/Secondary School • Three new Primary Schools and extended primary school • Up to 5,000 homes. Plan is for 2,400 houses by 2040. 5,000 homes by 2050 • Railway halt • Retail • Community Uses • Open Space. <p>Intend to submit a planning application deliver 1,000 homes by end of 2020/early 2021 to link to the Examination in Public.</p> <p>The 10 ha of E/B-Class employment is intended for a Knowledge Based business park, aimed at the high-tech sectors to attract graduates and companies from Cheltenham and Gloucester. It would be delivered close to the new Station in the north east of the scheme. As both developers are housebuilders it is not clear who would develop the employment and at what stage in the process, although it is intended to come forward before 2040 as part of Phase 1.</p> |

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| | There is also no agreement to apportion the development of lower values uses, such as employment between the housebuilders. |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | <p>Industrial/office – E(g)/B2/B8</p> <p><i>Growth of technology sectors, including green businesses (possibly)</i></p> <p><i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i></p> <p><i>Local scale expansion</i></p> <p>The proposed Knowledge Based business park is an ambitious proposal and would be an asset to the District if it could be delivered. In terms of market demand, the site is close to GSTP, Berkeley which has been meeting most demand for accommodation from technology sectors over the last few years, particularly from micro-small businesses looking for affordable premises. One key attraction here is the onsite skills/training facilities provided by owner/operator South Gloucestershire and Stroud College. The College intends to expand GSTP into areas of the facility now being decommissioned allowing it to meet demand for around the next decade. Mostly comprising refurbishments of existing buildings, GSTP does not provide new, modern space for larger established firms. Local access restrictions also mean it cannot accommodate larger manufacturing or logistics businesses, which generate extensive HGV traffic. To meet larger business requirements in the short-mid term, the College is looking to the Eco Park proposal at Junction 13, M5. Over the longer term, approx. 10-15 years in the future, however, development of a Knowledge Based business park at Sharpness could allow ongoing growth of local firms which began at GSTP and attract further inward investment. The proposed bid to locate STEP (Spherical Tokamak for Energy Production) – a fusion prototype plant – at Oldbury/Berkeley would provide an earlier opportunity here if successful.</p> <p>There are some practical barriers to delivery, however:</p> <ul style="list-style-type: none"> • <i>Delivery/Management</i> – A Knowledge Based business park would require a specialist developer to deliver, to market and to manage premises over the long term to maintain high standards. No such partner has been secured or is understood to have shown an interest at this time • <i>Anchor Occupier</i> – The two other specialist business park schemes proposed in the District, the Eco Park (Junction 13, M5) and the expansion of Renishaw New Mills, both have anchor occupiers secured, Ecotricity and the Renishaw linked company. These businesses will take up a high proportion of the space, ensure development occurs and attract other occupiers from their supply chains/customer base to the sites. At Quedgeley and Stonehouse development will build on an extensive critical mass of existing businesses. |

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| | <p>However, no equivalent anchor exists at Sharpness and existing companies at Sharpness Dock are unrelated to those which might be accommodated at the Knowledge Park.</p> <p>The most likely alternative to the Knowledge Park would be a traditional development of B1/B2/B8 industrial and warehousing, building on the established cluster of the Docks/Severn Distribution Park, reflecting local demand while also meeting the needs of the new households of the Sharpness Eco Settlement. The most likely need would be for modern smaller industrial units to compliment the older stock and larger premises which already exists locally and allow those who are, or would be, homeworking in the area to expand into premises.</p> |
| Availability, years | 10+ |
| <i>Scoring</i> | 48 |

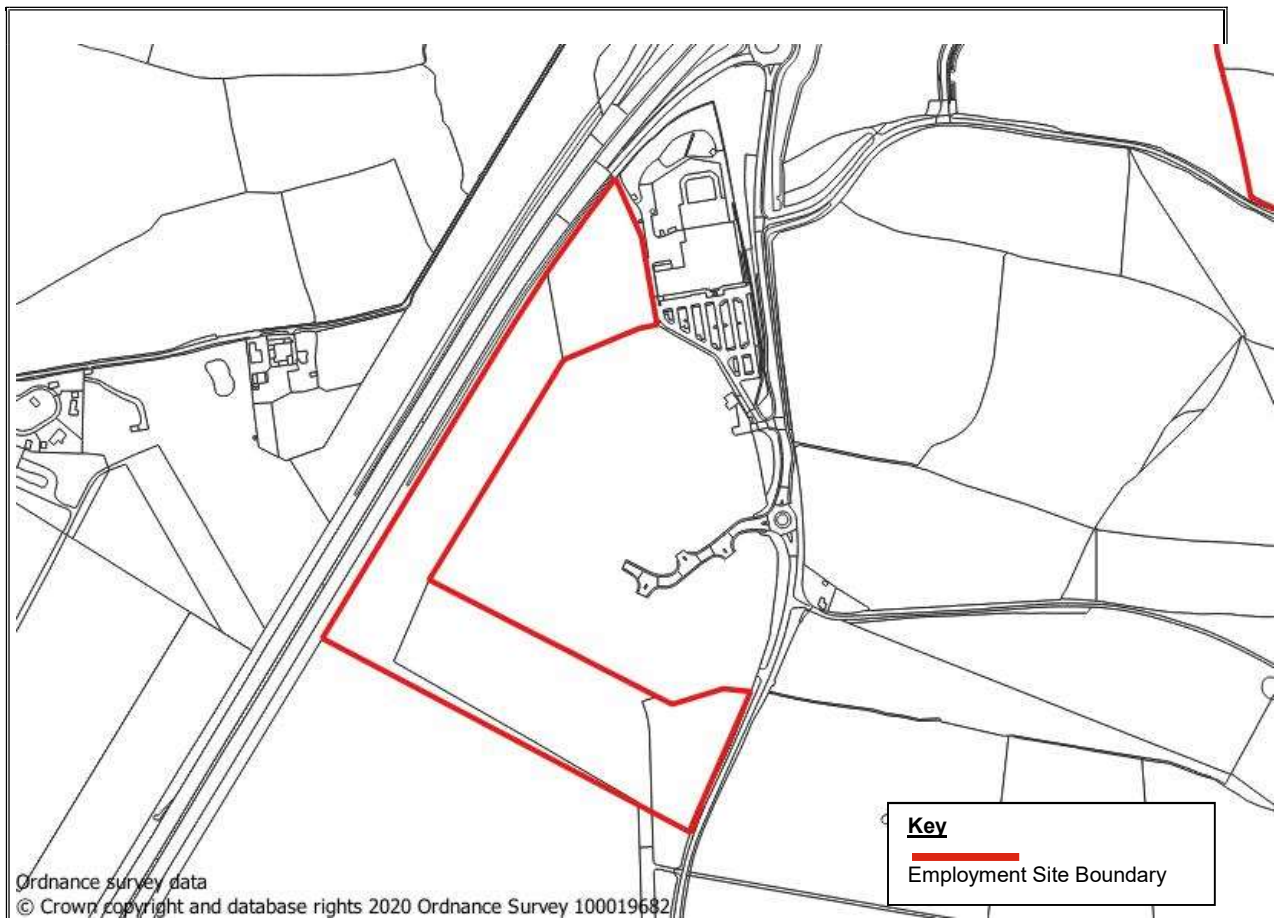


**The location of the employment land, within the wider mixed use development area' has yet to be determined.*

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| Site reference | PS37 | |
| Name | New settlement at Wisloe | |
| Brownfield /Greenfield | Mixed | |
| Owner | Gloucestershire County Council Ernest Cook Trust (Several agricultural tenancies on the site) | |
| Description | Two areas of mostly agricultural land, east and west of the A4135, between the A38 and the M5, north of Cam and south of Slimbridge | |
| Size, ha | 5.00 | |
| Site Development Constraints and Environmental Issues | Various existing buildings on the site, several tenancies Will need buffer with M5 Gas pipeline runs across the site. Watercourse crosses site | |
| Use | Existing | Mostly agricultural, plus multiple farms. Also, three existing industrial businesses and a ground for Slimbridge AFC |
| | Previous | Mostly agricultural, plus multiple farms. Also, three existing industrial businesses and a ground for Slimbridge AFC |

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| Location Type | Rural |
| Accessibility | Links to existing strategic road network – A38/A4135 |
| Distance to M5 Motorway, km | 5.8 |
| Distance to A-road, km | 0 – Off the A38/A4135 |
| Distance to Rail Station, km | 0.8 – Cam/Dursley |
| Distance to Existing Bus Route, km | 0 – A38/A4135 |
| Distance to Services, km | 1.7 - Cam |
| Adjacent Land Uses | Mostly agricultural. A38 to the north, M5 and railway line to the south. |
| Planning Policy Status | Proposed allocation in Draft Local Plan |
| Planning Issues | None |
| Development Status | <p>Put forward as a scheme of 1,500 homes and Stroud Council indicated that 5 ha of employment land should accompany this, so not the owners/agents' initiative that there should be employment here.</p> <p>The owners have appointed masterplanners on the site, LHC Design but they are at an early stage, producing initial concepts.</p> <p>Very early days, but the initial view is that the employment will be of a local scale, to support the housing and provide hubs for local business start-up and growth. Do not plan strategic schemes which would compete with the other proposals in the District. Accordingly, the 5 ha may be delivered as small plots, spread throughout the area, rather than as a single large site.</p> <p>Scheme will be housing led though, with employment delivered once a critical mass of housing is secured. It is not clear who would develop the employment and at what stage in the process.</p> <p>There is also no agreement to apportion the development of lower values uses, such as employment between the owners.</p> <p>Progressing site through Local Plan only at this stage. The owners will not seek planning permission until the Local Plan is adopted.</p> |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | <p>Industrial/office – E(g)/B2/B8</p> <p><i>Local scale expansion</i></p> <p>The owners intend that employment developed here will meet needs generated by the 1,500 homes. This quantum of housing will generate some business requirements but not necessarily in large numbers and those requirements are likely to be for micro business space in multi-let office or light industrial schemes. Such schemes would only be needed late in the development process, when a critical</p> |

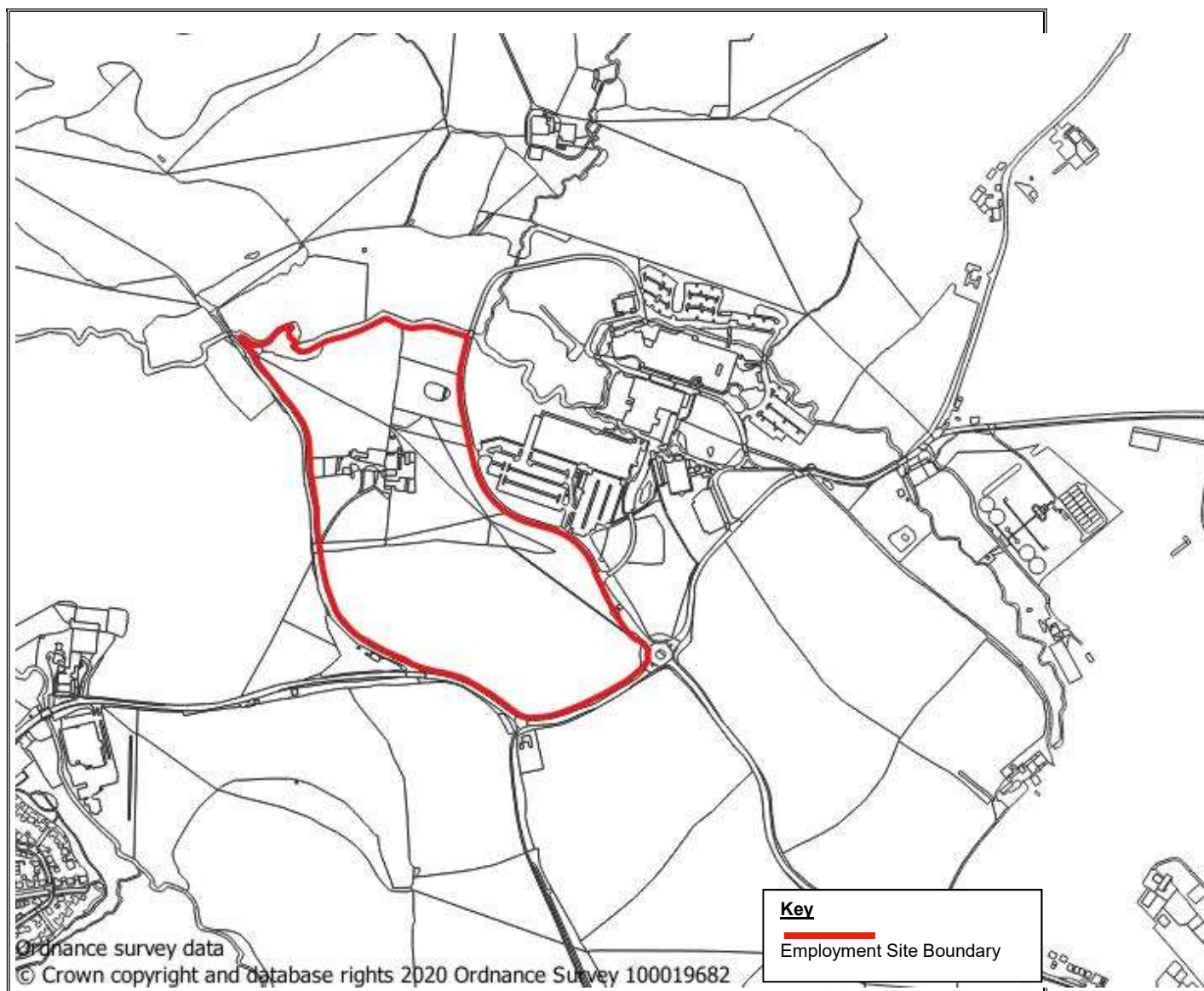
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| | <p>mass of housing has been delivered and may not take up 5 ha, by themselves.</p> <p>The site also links to the Cam/Dursley market, to the south. The recent experience of marketing new build industrial units at Littlecombe Business Park suggests that there is good local demand for freehold industrial units of up to 230 sqm, from mostly local firms. Also, some requirements for manufacturing space/storage uses from local firms looking to grow. The plots at the SA3: North East Cam site are likely to meet a lot of local needs in the short-medium term but land at Wisloe could meet longer term needs here.</p> |
| Availability, years | 10+ |
| <i>Scoring</i> | 56 |



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|---|----------|---|
| Site reference | | PS43 |
| Name | | Javelin Park |
| Brownfield /Greenfield | | Mixed |
| Owner | | Coethrop Farm (Tritax Symmetry have an option) |
| Description | | Irregular, 'L-Shaped' site to the south and west of the Gloucestershire Energy from Waste facility but forming a distinct development site. Fronts the M5 to the west. |
| Size, ha | | 9.00 |
| Site Development Constraints and Environmental Issues | | Energy from Waste Plant adjacent, although bund proposed to mitigate this Irregular shape Tritax are presently commissioning a range of site studies to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public. |
| Use | Existing | Primarily agricultural/vacant land |
| | Previous | Agricultural |
| Location Type | | Rural |
| Accessibility | | Direct access onto B4008 possible although access would be close to the existing Javelin Park roundabout. With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, |

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| | <p>development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes.</p> |
| Distance to M5 Motorway, km | 0.9 |
| Distance to A-road, km | 1.7 – A38 |
| Distance to Rail Station, km | 5.0 - Stonehouse |
| Distance to Existing Bus Route, km | 1.7 – A38 |
| Distance to Services, km | 0.3 – Blooms Garden Centre/Cafe |
| Adjacent Land Uses | <p>Existing Javelin Park development to the north</p> <p>M5 to the west</p> <p>Agricultural land to the south</p> |
| Planning Policy Status | Proposed allocation in the Draft Local Plan |
| Planning Issues | <p>Waste Core Strategy Allocation to the north</p> <p>EK14 – Javelin Park to the north - Policy E1</p> |
| Development Status | <p>Tritax argue that this site is undevelopable by itself, due to its irregular shape. Instead, Tritax is proposing Symmetry Park across the combined total area of Javelin Park and the east/west of Gloucester Road. 186, 000 sqm of B2/B8 in total:</p> <ul style="list-style-type: none"> • East of Gloucester Road = 82,000 sqm. Three units of 6,689-24,387 sqm • West of Gloucester Road = 104,000 sqm. • Seven units of 1,102-58,993 sqm. <p>No defined timetable for delivery but feel they could develop rapidly.</p> |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | <p>Industrial – B2/B8</p> <p><i>Larger industrial/warehouse units serving a county and regional market.</i></p> <p>Strong site, strategically located off the M5 in an area which has seen regular ongoing B2/B8 development since 2006.</p> <p>Tritax feel St Modwen’s investments have shown the strong logistics demand between Bristol and Gloucester, particularly for mid-box units. Based on experience developing in the M40 Corridor, units up to 35,000 sqm each could be brought forward here. See the M5 as a growing market while the M6 is now oversupplied. The Covid-19</p> |

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| | pandemic has only increased demand with 50 percent of shopping now done online, against 30 percent in January. Estimate this has generated demand for 557,360 sqm (6 million sqft) of extra B8 space nationally. |
| Availability, years | 1-5 |
| Scoring | 46 |



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| Site reference | PS47 | |
| Name | Renishaw New Mills | |
| Brownfield /Greenfield | Greenfield | |
| Owner | Swinhay Developments (Renishaw) | |
| Description | Agricultural land south and west of the Renishaw plant, and sharing a common access with that plant | |
| Size, ha | 9.00 | |
| Site Development Constraints and Environmental Issues | Includes farm with listed building | |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | Rural | |
| Accessibility | Will have common access with Renishaw plant, via roundabout onto the B4058. | |

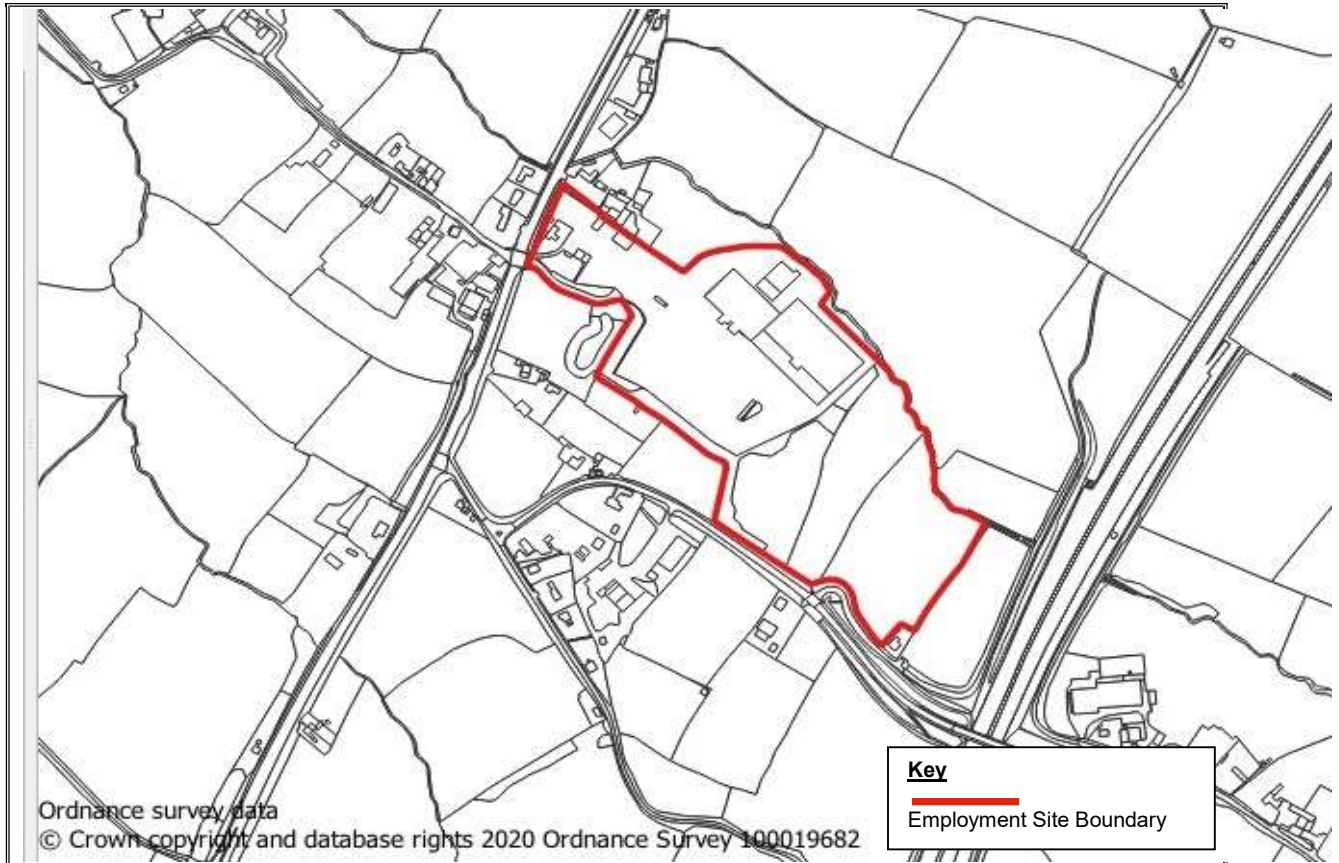
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| Distance to M5 Motorway, km | 5.8 |
| Distance to A-road, km | 6.8 |
| Distance to Rail Station, km | 12.0 - Cam |
| Distance to Existing Bus Route, km | 0 – B4058 |
| Distance to Services, km | 1.0 - Kingswood |
| Adjacent Land Uses | Renishaw New Mills facility to the north and east. Agricultural land to the west and south |
| Planning Policy Status | Proposed strategic site in the emerging Local Plan – PS47 |
| Planning Issues | Employment Area EK17 – Renishaw, New Mills to the north – Policy E11 |
| Development Status | <p>Site will house manufacturing facilities for another enterprise of Renishaw owner Sir David McMurtry. Stroud Council in advanced pre-application discussions over the scale and nature of the development.</p> <p>This use will take up 50-60 percent of the site i.e., 5.40 ha. In completing numerous employment land reviews BE Group has noted that it is normal to exclude, from the realistic supply land which will be held for the exclusive use of an owner and will not be made available to meet wider needs. In effect, this land has become part of the curtilage of that facility rather than being an open/available employment site.</p> <p>Owner intends to develop the rest to provide a small business park for similar businesses/supply chain companies.</p> |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | <p>Industrial – E(g)/B2/B8</p> <p><i>Development to meet the needs of a specific occupier. Prospect that this occupier will attract a small number of related supply chain businesses to sit alongside main occupier.</i></p> <p>Primary occupier established. Other occupiers will likely fit into the supply chain of Renishaw/new company.</p> |
| Availability, years | 1-5 |
| Scoring | 65 |

Other Sites



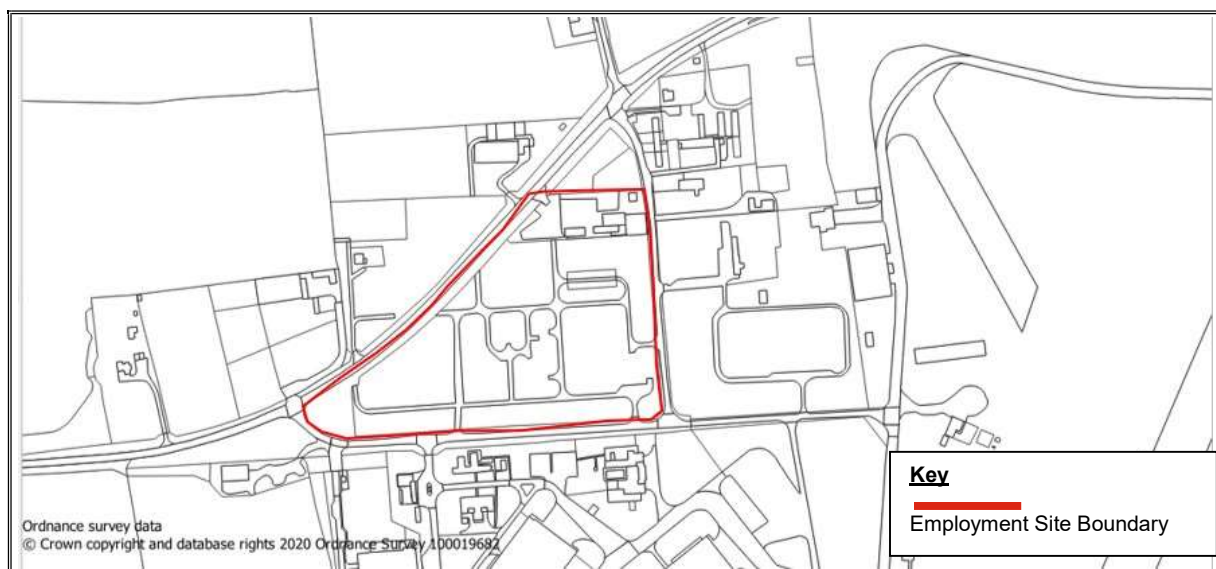
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| Site reference | | Ref. NPT003 |
| Name | | Land adjoining the A38, north of Newport, at Actrees Farm, Heath Field, Newport, Berkeley |
| Brownfield /Greenfield | | Mixed |
| Owner | | Private individuals |
| Description | | Dairy Farm off the A38, now accommodating a range of E/B-Class businesses, plus further expansion land to the south and east. |
| Size, ha | | 2.89 |
| Site Development Constraints and Environmental Issues | | Some flood attenuation needed |
| Use | Existing | Rural business park |
| | Previous | Dairy farm |
| Location Type | | Rural |
| Accessibility | | Site has direct access onto the A38 |
| Distance to M5 Motorway, km | | 6.1 |
| Distance to A-road, km | | 0 – On A38 |
| Distance to Rail Station, km | | 8.2 – Cam/Dursley |
| Distance to Existing Bus Route, km | | 0 – A38 |
| Distance to Services, km | | 0.8 - Newport |
| Adjacent Land Uses | | Surrounded by agriculture |
| Planning Policy Status | | None, Call for Sites/SALA submission only |

| | |
|------------------------------|---|
| | But multiple consents for E/B-Class conversions of farm buildings |
| Planning Issues | None |
| Development Status | Established rural employment site, owner is seeking to secure both existing site and growth land as an allocated Employment Area for the District. |
| Serviced | Yes |
| Market availability | Not Available |
| Likely development potential | Industrial/office – E(g)B2/B8 Successful rural employment site serving a wide rural catchment. Over the last 4 years around half the original farm has been re-used for E/B-Class employment, some 1.2 ha. It now accommodates 15 business, employing 90 people including a Film Studio and Saw Mill. Almost all are start-ups, with ongoing requirements. |
| Availability, years | 1-5 |
| Scoring | 76 |



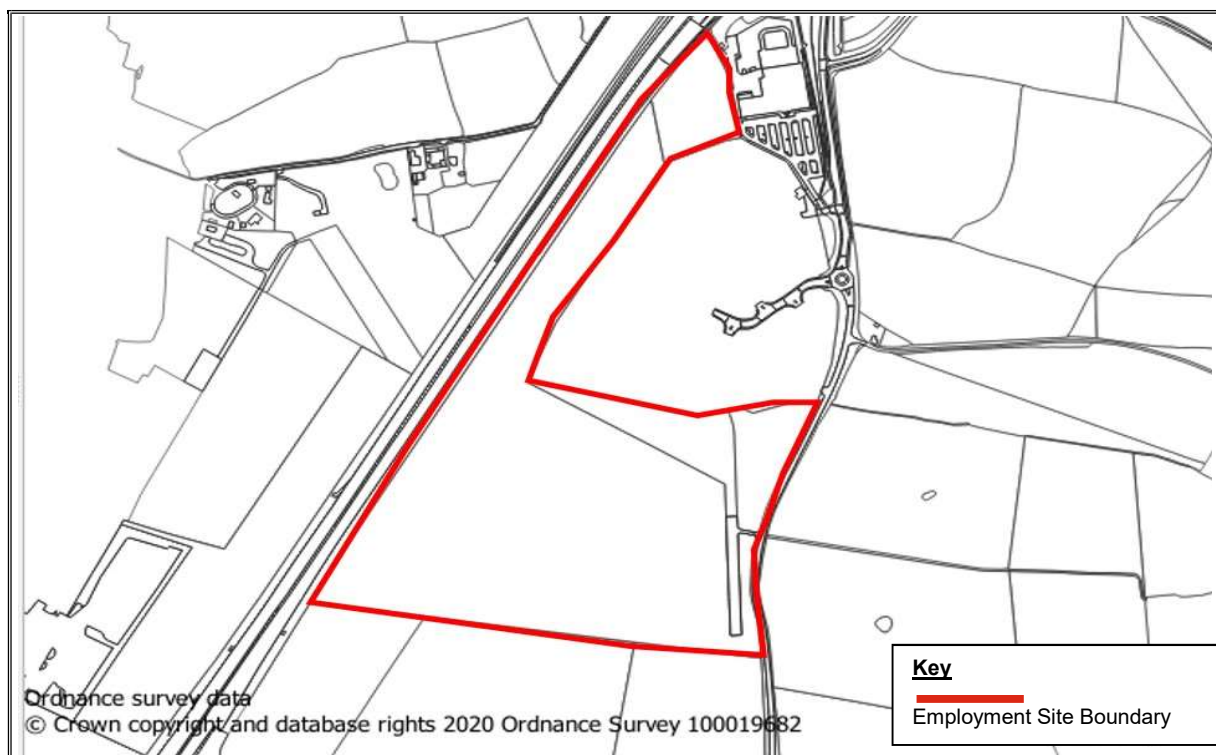
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| Site reference | | Rep WHI014 |
| Name | | CM Downton: Moreton Valence Downton buildings and surrounding land |
| Brownfield /Greenfield | | Mixed |
| Owner | | EV Cargo (Downton) |
| Description | | Existing Downton HQ facilities comprising frontage farm buildings, converted to offices and a large logistics unit to the rear. Also, greenfield expansion land to the east. All located in a rural site off the A38 and north west of the M5. |
| Size, ha | | 4.60 |
| Site Development Constraints and Environmental Issues | | Gas Main on site, Downton are in discussion to relocate it with British Gas. Trees on site Partly in Flood Risk Area, Flood Zones 2 and 3. Some diversions of public footpaths required. |
| Use | Existing | Existing Downton Facilities in west - HQ offices, Brook Farm (700 sqm), and 11,100 sqm of existing B8 space, with 120 HGV parking spaces and 120 car parking spaces. Agricultural in east. |
| | Previous | Existing Downton Facilities in west - HQ offices, Brook Farm (700 sqm), and 11,100 sqm of existing B8 space, with 120 HGV parking spaces and 120 car parking spaces. Agricultural in east. |
| Location Type | | Rural |

| | |
|--|---|
| Accessibility | Direct access onto A38 |
| Distance to M5 Motorway, km | 3.2 |
| Distance to A-road, km | 0 |
| Distance to Rail Station, km | 6.8 - Stonehouse |
| Distance to Existing Bus Route, km | 0 – A38 |
| Distance to Services, km | 1.6 - Whitminster |
| Adjacent Land Uses | Agricultural land, some farm buildings |
| Planning Policy Status | No allocation or proposed allocation at this time. Site Representation only |
| Planning Issues | None |
| Development Status | <p>Downton is looking to significantly intensify operations here, by redeveloping the whole site, both the existing Downton facilities and the agricultural land, to provide one warehouse of 41,500 sqm with ancillary operations offices of 680 sqm. There would be a detached head office complex of 680 sqm as well. This would be new development for the firm, not relocating existing facilities from elsewhere. Could provide up to 200 new jobs, in addition to the 450 already employed here.</p> <p>Timescale may slip due to the impacts of Covid-19 which have resulted in a 30-40 percent reduction in operations in the first half of 2020.</p> <p>However, plan is for a lead in over 2020-21, then a 2 year build program with completion by 2025. Developer would be CPLC.</p> <p>Development to allow the growth of a specific owner-occupier only. Land will not be made available to meet the broader business needs. In discussions. In completing numerous employment land reviews BE Group has noted that it is normal to exclude, from the realistic supply land which will be held for the exclusive use of an owner and will not be made available to meet wider needs. In effect, this land has become part of the curtilage of that facility rather than being an open/available employment site.</p> <p>CM Downton highlighted that they wished to see the site allocated as a E/B-Class Employment Area in the next Local Plan, rather than considered as available employment land. As the scale of what is already developed here, and what is proposed in the future, exceeds most small rural industrial estates/business parks, this seems logical.</p> |
| Serviced | Yes - Part |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Warehouse – B8 <i>Development to meet the needs of a specific business only</i> |
| Availability, years | 1-5 |
| Scoring | 58 |



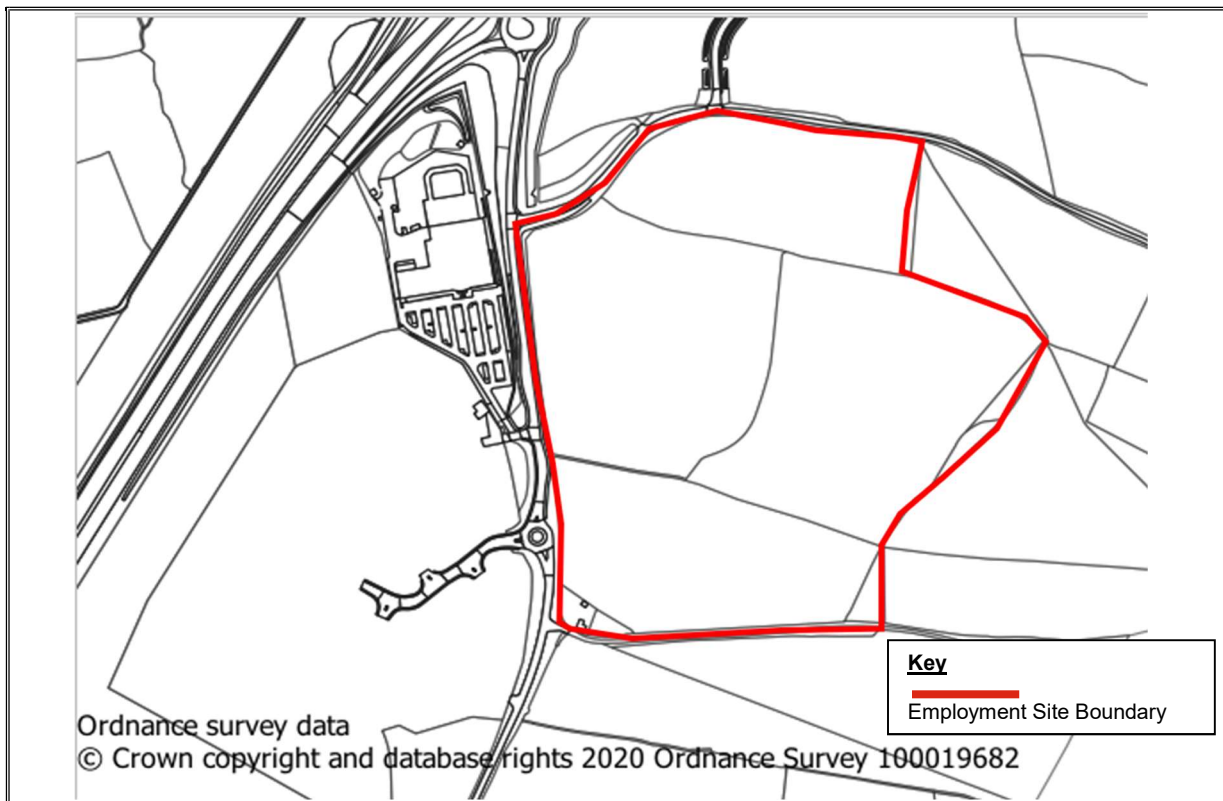
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| Site reference | Rep. MIN012 | |
| Name | Land adjoining Aston Down Business Park and Land to the North | |
| Brownfield /Greenfield | Brownfield | |
| Owner | Leda Properties | |
| Description | Irregularly shaped area of brownfield land, north and west of the existing business park, with Cirencester Road to the north. | |
| Size, ha | 3.80 | |
| Site Development Constraints and Environmental Issues | <p>Foundations of some historic buildings/roads on the site</p> <p>Trees on the site</p> <p>In Area of Outstanding Natural Beauty (AONB)</p> <p>In a decision on planning appeals by Leda Properties, Leda Properties Pension Fund and Squirrel Storage (Appeal. Nos. APP/C1625/A/07/2055526, APP/F1610/A/07/2055089, APP/C1625/C/08/2083828, APP/C1625/C/08/2085829, APP/F1610/C/08/2089015) it was broadly determined that re-use of the existing buildings at Aston Down was acceptable in the AONB but new build development or significant open storage was not, this was also due to traffic impacts on the A419</p> | |
| Use | Existing | Vacant |
| | Previous | Buildings relating to an RAF base |
| Location Type | Rural | |
| Accessibility | Access via Cirencester Road to the A419, as with the existing Business Park. | |
| Distance to M5 Motorway, km | 16 | |
| Distance to A-road, km | 0.6 – A419 Cowcombe Hill | |
| Distance to Rail Station, km | 8 – Stroud Station | |

| | |
|--|---|
| Distance to Existing Bus Route, km | 0.1 – Cirencester Road |
| Distance to Services, km | 4 – Bussage local shops (Tanglewood Way) |
| Adjacent Land Uses | Existing business park to the south and east, with Cirencester Road to the north. |
| Planning Policy Status | Site put forward in Call for Sites/SALA only |
| Planning Issues | Employment Area EK21 - Aston Down to the south – Policy EI1 |
| Likely development potential/Market Development Status | Proposed allocation here is led by a requirement from a Stroud-based logistics business, whose owner lives close to Aston Down and wishes to move the business here. This business also intends to consolidate operations from other parts of England here. This will take up a third to half the site. Land to meet other requirements, as needed. It is not clear if any expansion of the Business Park is permissible, however, if it is it would be preferable to focus growth inside the existing allocated area, to minimise impacts on the surrounding countryside. In this regard it is noted that consent is being sought for 13,231 sqm of E/B-Class premises on 5.15 ha (3.38 ha within Stroud District, the rest in Cotswold District) of infill development with the existing Employment Area (App. No. S.20/0716/FUL). |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential | Industrial – B2/B8 <i>Development to meet the needs of a specific business only</i> Aston Down is well occupied and has attracted businesses from a broad rural catchment, including a range of budget companies which would struggle to find affordable accommodation elsewhere in this area. The strength of demand here is reflected in the growth aspirations the owners have for Aston Down. However, the promotion of this site as an employment land allocation is driven by a specific business requirement. |
| Availability, years | 1-5 |
| Scoring | 48 |



| | | |
|---|--|--------------|
| Site reference | Rep. HFD012 | |
| Name | Land west of Gloucester Road (B4008), Haresfield | |
| Brownfield /Greenfield | Greenfield | |
| Owner | Colethrop Farm (Tritax Symmetry have an option) | |
| Description | Area of greenfield agricultural land south of Javelin Park and identified as part of a larger logistics scheme. | |
| Size, ha | 18.00 gross, 13.10 net | |
| Site Development Constraints and Environmental Issues | Trees on site Tritax are presently commissioning a range of site studies to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public | |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | Rural | |
| Accessibility | <p>New access onto B4008.</p> <p>With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million.</p> <p>Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which</p> | |

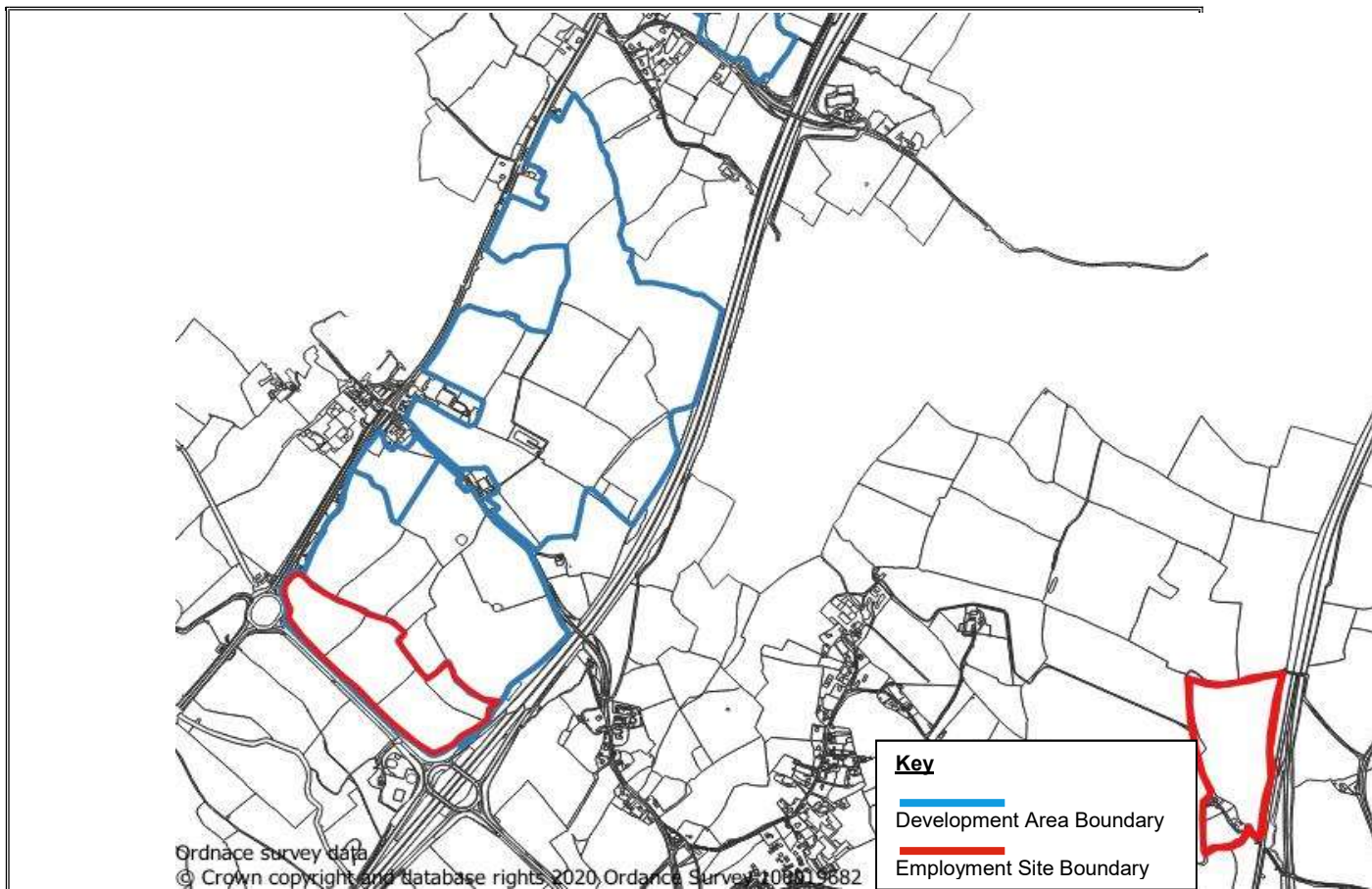
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| | is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes. |
| Distance to M5 Motorway, km | 0.9 |
| Distance to A-road, km | 1.7 – A38 |
| Distance to Rail Station, km | 5.0 - Stonehouse |
| Distance to Existing Bus Route, km | 1.7 – A38 |
| Distance to Services, km | 0.1 – Blooms Garden Centre/Cafe |
| Adjacent Land Uses | M5 to the west, Javelin Park to the north, agricultural land to the south and east. |
| Planning Policy Status | No allocation or proposed allocation at this time. Site Representation only |
| Planning Issues | Waste Core Strategy Allocation to the north EK14 – Javelin Park to the north - Policy E1 |
| Development Status | Tritax is proposing Symmetry Park across the combined total area of Javelin Park and the east/west of Gloucester Road. 186, 000 sqm of B2/B8 in total: <ul style="list-style-type: none"> • East of Gloucester Road = 82,000 sqm. Three units of 6,689-24,387 sqm • West of Gloucester Road = 104,000 sqm. • Seven units of 1,102-58,993 sqm. No defined timetable for delivery but feel they could develop rapidly. |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial – B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market</i> Strong site, strategically located off the M5 in an area which has seen regular ongoing B2/B8 development since 2006. Tritax feel St Modwen's investments have shown the strong logistics demand between Bristol and Gloucester, particularly for mid-box units. Based on experience developing in the M40 Corridor, units up to 35,000 sqm each could be brought forward here. See the M5 as a growing market while the M6 is now oversupplied. The Covid-19 pandemic has only increased demand with 50 percent of shopping now done online, against 30 percent in January. Estimate this has generated demand for 557,360 sqm (6 million sqft) of extra B8 space nationally. |
| Availability, years | 1-5 |
| Scoring | 59 |



| | | |
|---|----------|--|
| Site reference | | Rep. HFD011 |
| Name | | Land east of Gloucester Road (B4008), |
| Brownfield /Greenfield | | Greenfield |
| Owner | | Coethrop Farm |
| Description | | Greenfield agricultural land, south of the developing St Modwen Park and east of Javelin Park. |
| Size, ha | | 20.70 gross, 15.80 ha net |
| Site Development Constraints and Environmental Issues | | Trees on site Tritax are presently commissioning a range of site studies to confirm any physical, environmental, etc. constraints in advance of the Local Plan Examination in Public |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | | Rural |
| Accessibility | | New access onto B4008. With the consent at Quedgeley East (St Modwen Park) there is now a capacity issue at J12, M5. Further, development will trigger the requirement, from Highways England, for a major investment and upgrading of the junction. This will cost in excess of £25 million. Highways England are considering potential upgrades to both junctions 12 and 14, which could under certain circumstances include interim solutions to allow some development, provided they do not prejudice the delivery of a wider scheme. Once the Council know the overall |

| | |
|--|--|
| | impacts of the Local Plan growth on these junctions it will be agreeing with Highways England a way forward, which is likely to include major bids for Government funding, so the full costs will not fall on developers. As of yet there have been no discussions with developers about what they will need to contribute or how costs could be apportioned between schemes. |
| Distance to M5 Motorway, km | 0.2 |
| Distance to A-road, km | 1.1 – A38 |
| Distance to Rail Station, km | 5.7 - Stonehouse |
| Distance to Existing Bus Route, km | 1.1 – A38 |
| Distance to Services, km | 0.1 – Blooms Garden Centre/Cafe |
| Adjacent Land Uses | St Modwen Park to the north, Javelin Park to the west. Agricultural land to the south and east. |
| Planning Policy Status | No allocation or proposed allocation at this time. Site Representation only |
| Planning Issues | Waste Core Strategy Allocation to the west EK14 – Javelin Park to the west - Policy E1 St Modwen Park to the North – 2015 Local Plan Allocation – Strategic Site SA4a |
| Development Status | Tritax is proposing Symmetry Park across the combined total area of Javelin Park and the east/west of Gloucester Road. 186,000 sqm of B2/B8 in total: <ul style="list-style-type: none"> • East of Gloucester Road = 82,000 sqm. Three units of 6,689-24,387 sqm • West of Gloucester Road = 104,000 sqm. • Seven units of 1,102-58,993 sqm. No defined timetable for delivery but feel they could develop rapidly. It is assumed this would be a second phase of the scheme, with Javelin Park/Land West of Gloucester Road developed first |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial – B2/B8 <i>Larger industrial/warehouse units serving a county and regional market.</i> Strong site, strategically located off the M5 in an area which has seen regular ongoing B2/B8 development since 2006. Tritax feel St Modwen's investments have shown the strong logistics demand between Bristol and Gloucester, particularly for mid-box units. Based on experience developing in the M40 Corridor, units up to 35,000 sqm each could be brought forward here. See the M5 as a growing market while the M6 is now oversupplied. The Covid-19 pandemic has only increased demand with 50 percent of shopping now done online, against 30 percent in January. Estimate this has generated demand for 557,360 sqm (6 million sqft) of extra B8 space nationally. |
| Availability, years | 5-10 |

| | |
|----------------|----|
| <i>Scoring</i> | 54 |
|----------------|----|



| | | |
|---|--|--------------|
| Site reference | Rep. 00493d | |
| Name | Land north of Grove End Farm, Whitminster | |
| Brownfield /Greenfield | Greenfield (primarily) | |
| Owner | Primarily Chambers Farm and Manor Farm (Robert Hitchins has an option) | |
| Description | Agricultural land between the A38/Whitminster settlement area and the M5, north east of Junction 13, M5 | |
| Size, ha | 13.40 | |
| Site Development Constraints and Environmental Issues | Woodland on site Public rights of way cross the site Ponds on site Gas pipeline crosses the site. | |
| Use | Existing | Agricultural |
| | Previous | Agricultural |
| Location Type | Rural | |
| Accessibility | Would access adjoining A38, A419 and M5, Junction 13 | |
| Distance to M5 Motorway, km | 0 | |
| Distance to A-road, km | 0 – A419, A38 adjacent | |
| Distance to Rail Station, km | 3.8 – Stonehouse | |
| Distance to Existing Bus Route, km | 0 – A419, A38 adjacent | |

| | |
|--|--|
| Distance to Services, km | 0 – Some adjacent services in Whitminster |
| Adjacent Land Uses | Whitminster/A38/several roadside businesses to the west, M5 to the east. A419 to the south, agriculture to the north |
| Planning Policy Status | Submission to Call for Sites/SALA only |
| Planning Issues | Industrial Heritage Conservation Area, associated with River Frome to the south – Policy ES10 Proposed cycle route through to the south – Policy EI13 |
| Development Status | Submission made to SALA/Call for Sites for 2,250 new homes along with employment land, a local centre, sports/recreation facilities and a primary school, landscaping and open space In terms of delivery it is anticipated that the Site could deliver around 150 dwellings/year. If the Local Plan were to be adopted in winter 2021/22, the first dwellings completed on the Site would be in December 2024 with a 15 year build programme. No timetable for the employment element put forward or details of what that employment land would comprise. The Council is presently considering the traffic impacts of this scheme. A planning application is expected alongside the Local Plan Examination in Public. |
| Serviced | No |
| Market availability | Not Available |
| Likely development potential/Market Need Met | Industrial/office – E(g)/B2/B8 <i>Motorway linked larger industrial/warehouse units, serving the wider Gloucestershire/regional market Meeting the growth needs of existing mid-sized/large local manufacturing and warehouse businesses in Stroud Valleys/Stonehouse</i> Although only a Call for Sites submission at this stage, with no detailed masterplanning or agreements amongst the landowners about the nature of delivery, this location does have some advantages over the other New Settlement proposals, at least in terms of employment land deliverability. These include the fact that the land is under the control of an experienced developer who is already active in the area, marketing E/B-Class plots at West of Stonehouse, thus knows the local market and business requirements. The employment land is in a very strong location off Junction 13, M5 allowing it to tap into the two core markets of the District – larger sub-regional/regional requirements on the M5 Corridor and large business growth in Stroud/Stonehouse. The Linear nature of the proposed employment site would prevent development of the very largest B2/B8 units here, but it could still provide some 52,000 sqm of space at standard developer ratios. The site would also benefit from proximity to the Eco Park proposal, which would build up a critical mass of businesses at Junction 13. There could be some |

| | |
|---------------------|---|
| | competition between the two sites, however, the Eco Park will focus on accommodating businesses with specialisms in green technology. There is no assumption the Land north of Grove. |
| Availability, years | 10+ |
| Scoring | 58 |

Appendix 8

Sites Scoring

Appendix 8 – Sites Scoring

| Site Name | Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site Availability | Total |
|--|-----------|--------------------------|------------|------------------|-----------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|
| | | Location | Prominence | Public Transport | Sequential test | | Services Availability | Constraints | Environmental Setting | Flexibility | | |
| Quedgeley East (SA4a) | 8.50 | 10 | 10 | 0 | 3 | 10 | 10 | 8 | 10 | 8 | 10 | 79 |
| M5 Junction 13 (PS20) | 10.00 | 10 | 10 | 5 | 3 | 8 | 7 | 10 | 10 | 8 | 8 | 79 |
| Actrees Farm | 2.89 | 10 | 8 | 5 | 3 | 10 | 10 | 8 | 9 | 5 | 8 | 76 |
| North East Cam (SA3) | 10.72 | 8 | 4 | 10 | 7 | 8 | 7 | 4 | 7 | 6 | 8 | 69 |
| Renishaw New Mills (PS47) | 9.00 | 0 | 6 | 5 | 3 | 1 | 7 | 8 | 19 | 8 | 8 | 65 |
| West of Stonehouse (SA2) | 10.00 | 3 | 4 | 5 | 7 | 8 | 7 | 6 | 9 | 7 | 8 | 64 |
| South of Severn Distribution Park (SA5a) | 9.80 | 1 | 6 | 5 | 3 | 10 | 7 | 4 | 8 | 7 | 10 | 61 |
| Land west of Gloucester Road (B4008) | 13.10 | 10 | 6 | 0 | 3 | 1 | 7 | 10 | 6 | 8 | 8 | 59 |
| Land north of Grove End Farm | 13.40 | 10 | 10 | 5 | 3 | 1 | 7 | 2 | 9 | 9 | 2 | 58 |
| CM Downton | 4.60 | 10 | 9 | 5 | 3 | 1 | 10 | 2 | 5 | 3 | 8 | 56 |
| New settlement at Wisloe (PS37) | 5.00 | 10 | 9 | 10 | 3 | 1 | 7 | 2 | 9 | 3 | 2 | 56 |
| Quedgeley East Extension (PS32) | 5.00 | 9 | 2 | 5 | 3 | 1 | 7 | 6 | 10 | 5 | 6 | 54 |
| Land east of Gloucester Road (B4008) | 15.80 | 9 | 6 | 0 | 3 | 1 | 7 | 8 | 6 | 8 | 6 | 54 |
| New settlement at Sharpness (PS36) | 10.00 | 1 | 6 | 5 | 3 | 1 | 7 | 4 | 10 | 9 | 2 | 48 |
| Land adjoining Aston Down Business Park | 3.80 | 8 | 4 | 5 | 3 | 1 | 7 | 2 | 5 | 5 | 8 | 48 |
| North West of Stonehouse (PS19a) | 5.00 | 3 | 4 | 5 | 7 | 1 | 3 | 2 | 9 | 7 | 6 | 47 |
| Javelin Park (PS43) | 9.00 | 9 | 6 | 0 | 3 | 1 | 7 | 6 | 3 | 3 | 8 | 46 |
| Sharpness Docks (SA5) | 6.60 | 1 | 6 | 5 | 3 | 4 | 7 | 0 | 3 | 3 | 2 | 34 |

Source: BE Group, 2020