REBE001

BRAINTREE DISTRICT COUNCIL EMPLOYMENT LAND REVIEW

PREPARED FOR BRAINTREE DISTRICT COUNCIL
BY RAMIDUS CONSULTING, WITH CAG
CONSULTANTS

Adopted February 2025

RAMIDUS

CAG CONSULTANTS

Contents

1.0 Introduction

This Employment Land Review (ELR) was commissioned by Braintree District Council (the Council) in June 2024. The study was commissioned to provide an updated employment uses evidence base to support the Local Plan review process.

The Council's current Local Plan, covering the period to 2033, was adopted in two parts, in 2021 and 2022, but it's likely that the Plan will be considered out of date by 2026. In order to extend the plan period up to 2041 the current study provides fresh employment evidence to calculate the additional land allocations needed to accommodate a range of growth scenarios over the additional seven-year period. The Council's Project Brief anticipates that the new employment land evidence will recommend a proportionate quantum of new land will need to be allocated. The consultant should recommend a range of suitable, viable and policy compliant options from which the Council may choose its preferred option

Braintree District is located in Essex in proximity to the larger towns of Chelmsford and Colchester, and to the districts of Maldon and Uttlesford. It is on the East Anglia mainline rail with branch lines to Braintree Town and Sudbury, enabling Braintree residents to access London Liverpool Street within an hour by train. The district is also served by the A120 (which runs east-west and connects to the M11), A12 and A131. The A120 allows for quick access to Stansted Airport, which is approximately 20 minutes away. The largest town is Braintree, followed by Witham then Halstead. Most employment land is distributed among these three towns but is supplemented by a number of rural sites.

1.1 Background

This ELR goes beyond a quantitative assessment to help define Braintree's future economic role and the commercial property market products it needs to fulfil that role. The purpose of the ELR is to provide a robust evidence base and associated recommendations to assist in the development of policies and strategic designations as the Council begins its review of the Local Plan. The main objectives of the ELR are to provide the following elements.

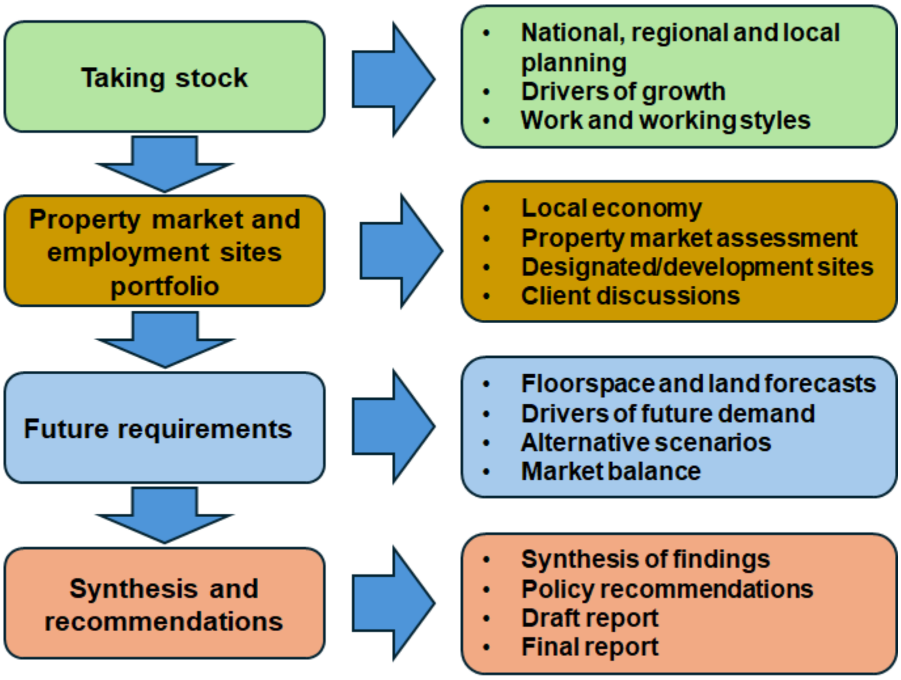
- An understanding of the recent changes in the Use Class Order and the Permitted Development Rights, and the impact these will have on the Council's ability to plan for employment uses.
- An overview of the current economic characteristics of the District, including the job numbers, business count and key business sectors.
- An understanding of the local economy and demand for employment space in the District, both at a high level (i.e. split between office and industrial) and at a more fine-grained level (looking at specific industries, businesses and types of work space.
- An assessment of future supply-demand dynamics, broken down by sector, and covering the next 15 year period.
- Policy recommendations regarding the boundaries of existing designated sites, any new sites proposed for designation, the types of uses that should be encouraged on different sites, any policies or council actions that could enhance the quality and/or competitiveness of designated sites, affordable

workspace, and industrial intensification, co-location and (if relevant) substitution.

1.2 Approach and method

Our approach is based on an established ELR template which is fully compliant with the National Planning Policy Framework (NPPF) and the methodology set out in Planning Practice Guidance on Housing and Economic Needs Assessment (ID2a). Our approach ensures that the key deliverables and outputs are transparent and easily understood, particularly by the Inspector and commentators at an Examination. The stages of work and tasks are summarised in Figure 1.1.

Figure 1.1 Employment Land Review methodology



- **Taking stock** This involves a review of the national, and local spatial planning context, the extant Local Plan and ELR, a range of policy and other Council documents, and background material. It also considers the broader drivers of change affecting the economy and spatial planning.

- **Economy, property market and employment sites portfolio** This involves an assessment of the local economy and property market dynamics using a combination of fieldwork, data analysis and engagement with local property agents. It also involves a detailed empirical assessment of the District's employment sites.

- **Future requirements** This section uses Cambridge Econometrics forecasts and the evidence from the first two stages to prepare projections of future requirements for land and buildings within the District.

- **Synthesis and recommendations** This final stage of work pulls together the various strands of research into a coherent overview of the main findings, and provides a clear, robust, evidence-based set of policy recommendations.

ELRs are undertaken to evaluate the supply of and demand for *employment land*. Traditionally, this is classed as land and premises which broadly supports office, industrial and warehousing activities. Until recently these were reflected in Use Classes B1(a), B2 and B8, respectively. As noted in Section 3.2 below, recent changes to the Use Classes Order mean that Class B1 has been included within a new, much broader “Commercial, Business and Service” use called “Class E”.

This brackets together a wide variety of uses into a single use class, including retail space (use classes A1-A3), office space (B1), as well as other elements including research and development facilities; light industrial uses; health centres, crèches, day nurseries and day centres (D1) and gyms and most indoor recreation (D2). The previous ‘B’ uses are represented as Office E(g)(i), Research & Development E(g)(ii) and Light Industrial E(g) (iii).

This study continues to refer to the ‘B’ designation in order to allow direct comparison of multiple data sets either side of the changes made in 2020.

2.0 Spatial planning context

The chapter sets out the planning and spatial strategy context for the ELR. We provide the relevant headlines from the NPPF, which sets the overall tone and objectives for national spatial planning. We then summarise relevant regional or sub-regional policies. Finally, we summarise the key points from the extant Braintree Local Plan, where these are relevant to the purpose of the ELR.

2.1 National planning

This ELR has been prepared during the early months of a new Government with ambitions to overhaul the planning process. A key objective of this overhaul is to ensure that delivery of new housing is increased to meet growing demand.

Draft revisions to the NPPF were announced on 31st July 2024 and were put out for consultation for eight weeks, until 24th September. The revisions comprise a mix of proposals that either accept or reverse changes made to the December 2023 version of the framework and then introduce new policies. The key changes are ultimately focused on a bold strengthening of the drive to meet housing and other development needs.

Section 2. Achieving sustainable development This section maintains the overall objectives of the previous NPPF, in so far as it states that the purpose of the planning system is to contribute to the achievement of sustainable development, and that this means that the planning system has three overarching objectives:

> *a) an economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;*
>
> *b) a social objective – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being; and*
>
> *c) an environmental objective – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy*. (Para 8)

The new NPPF reinforces the presumption in favour of sustainable development, which means that all plans

> *should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects*. (Para 11)

Section 3. Plan-making This section highlights the new Government's emphasis on the value of strategic planning in national policy. The draft changes re-affirm the role of strategic planning and state that:

> *Strategic policies should set out an overall strategy for the pattern, scale and design quality of places and make sufficient provision for:*
>
> *a) housing (including affordable housing), employment, retail, leisure and other commercial development.* (Para 20)

The revised NPPF also calls for effective strategic co-operation between local authorities. It states that:

> *Effective strategic planning across local planning authority boundaries will play a vital and increasing role in how sustainable growth is delivered and key spatial issues, including meeting housing needs, delivering strategic infrastructure, and building economic and climate resilience, are addressed.* (Para 24)

There is also an emerging plan of how cross boundary working will be encouraged. The NPPF revisions state: "*We intend to identify priority groupings of other authorities where strategic planning – and in particular the sharing of housing need requirements – would provide particular benefits, setting a clear expectation of cooperation that we will help to structure and support this, and to use powers of intervention where necessary".* (Para 28)

It goes on to set out what this means in practice.

> *Once the matters which require collaboration have been identified, strategic policy-making authorities should make sure that their plan policies are consistent with those of other bodies where a strategic relationship exists on these matters, and with the relevant investment plans of infrastructure providers, unless there is a clear justification to the contrary. In particular their plans should ensure that:*
>
> *a) a consistent approach is taken to planning the delivery of major infrastructure, such as major transport services/projects, utilities, waste, minerals, environmental improvement and resilience, and strategic health, education and social infrastructure (such as hospitals, universities, major schools, major sports facilities and criminal justice accommodation);*
>
> *b) unmet development needs from neighbouring areas are accommodated in accordance with paragraph 11b; and*
>
> *c) any allocation or designation which cuts across the boundary of plan areas, or has significant implications for neighbouring areas, is appropriately managed by all relevant authorities."* (Para 27)

This suggests that the Government expects this new strategic approach to encourage cross boundary working and help to address the most difficult issues for strategic planning, most notably the distribution of housing in areas where planning policy and other factors including local politics have acted to constrain growth.

Section 6. Building a strong, competitive economy Revisions to the chapter on economic growth are predominantly focussed on additional industries and uses where planning policies should be identifying sites to meet emerging needs and drive economic growth. There is no dramatic change to the policies on economic growth, but draft changes propose to expressly require LPAs to identify *"appropriate sites"* for needs of the modern economy, with "*laboratories, gigafactories, data centres, digital infrastructure, freight and logistics*" specifically highlighted.

As part of this study we have assessed a number of sites put forward through a recent 'Call for Sites' between April and May 2024. We have provided guidance on the suitability of these sites for employment land and on those sites where this guidance has been positive, further work should make a more detailed assessment of their suitability for these specific uses.

The NPPF seeks to ensure sufficient land is made available to "*support economic growth and productivity, taking into account both local business needs and wider opportunities for development*". (Para 83) The NPPF further states that planning policies should:

> *a) set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;*
>
> *b) set criteria, and identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period. Appropriate sites for commercial development which meet the needs of a modern economy should be identified, including suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics*
>
> *c) seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment, and*
>
> *d) be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices … and to enable a rapid response to changes in economic circumstances.* (Para 84)

Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitably accessible locations. (Para 85)

Braintree has a significant amount of rural land and employment sites in rural areas. The NPPF states that planning policies and decisions should enable:

> *a) the sustainable growth and expansion of all types of business in rural areas, both through conversion of existing buildings and well-designed, beautiful new buildings;*
>
> *b) the development and diversification of agricultural and other land-based rural businesses;*

> *c) sustainable rural tourism and leisure developments which respect the character of the countryside; and*
>
> *d) the retention and development of accessible local services and community facilities, such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship. (Para 86)*

The NPPF goes on to state that

> *Planning policies and decisions should recognise that sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport.*

The guidance concedes that in such circumstances it will be "important to ensure that development is sensitive to its surroundings, does not have an unacceptable impact on local roads and exploits any opportunities to make a location more sustainable". The use of previously developed land, and sites that are physically well-related to existing settlements, should be encouraged where suitable opportunities exist. (Para 87)

2.2 Regional planning

As from 1st April 2024 the activities of the South East LEP (SELEP) were transferred to the constituent local authorities. Nevertheless, a few points are worth highlighting.

SELEP's economic strategy *Working Together for a Faster, Smarter and More Sustainable Economic Recovery* (2021) set out how SELEP would work with partners to support a path to recovery and renewal in the short to medium term. The strategy featured four strategic priorities, including supporting business resilience and growth; supporting the implementation of freeports and building on a strong record of inward investment; developing high-quality new communities; and facilitating greater connectivity across the area; supporting rural businesses to grow; increasing access to learning at all levels; and supporting the recovery, adaptation and growth of our visitor economy.

SELEP's *Smarter Faster Together Strategy* (2019) preceded SELEP's Economic Recovery and Renewal Strategy and it sought to put in place a Local Industrial Strategy for the SELEP area. This document set out SELEP's ambitions to make the area a '*more productive and more prosperous economy in which everyone has the opportunity to succeed*'. The core vision of the strategy was to reduce the gap in productivity between SELEP and the rest of the UK.

At the Essex level, the *Levelling Up Essex White Paper* (2021) set out the County's vision on levelling up, tackling several key challenges identified within Essex. The Paper identified Rural Braintree as one of six priority places for investment within Essex, being ranked low in the deprivation assessment exercise undertaken by the Council. The paper identified five main areas in which support is needed:

> **The economy** – improving access to 'good jobs' in which people earn enough money to support a decent quality of life, and have the job security, flexibility and progression opportunities to create a good career.

The environment – improve access to the natural environment and green spaces, and address climate impacts such as flooding. There is a commitment to making the transition to carbon net zero in a way which widens opportunities, through creating more green jobs and greater access to active and sustainable forms of travel.

Health and wellbeing – supporting people to live long, happy and healthy lives by having high levels of physical and mental health and the social connections needed for wellbeing.

Education and skills – improvements are needed to education attainment and ensuring that all can access good quality and relevant skills at all stages of their life.

Families and communities – support people to grow up and live in strong, safe and resilient families and community.

The Levelling Up Essex White Paper is complemented by the *Essex Sector Development Strategy* (2022), which targets '*a stronger, more inclusive, and more sustainable future economy*'. This strategy identifies five key growth sectors for Essex, which are: construction (including retrofit), clean energy, advanced manufacturing & engineering, digital and life sciences (including med-tech and care-tech). The Strategy aims to drive growth in jobs and productivity within these sectors through three strategic goals:

Strategic goal 1: A thriving economy – making Essex a centre of innovation and entrepreneurial spirit where the benefits of this growth are felt within the county rather than elsewhere.

Strategic goal 2: An economy for everyone – ensuring every resident of Essex has the opportunity to gain the skills and experience to succeed in the future economy regardless of their background and identity.

Strategic goal 3: An economy fit for the future – making green growth intrinsic to all future growth to ensure we meet our target for a net zero county by 2035.

The *Essex Sector Development Strategy Report* builds on the above strategy to showcase the County's ambitions to transform its economy. It commits to deliver five key aims through which the county's longer-term aims will be realised:

- creating good jobs for Essex residents;
- addressing the drivers of inequality by Levelling Up the economy;
- creating the conditions for future growth and investment;
- capturing the benefits to the economy and the environment of Green Growth, and
- hitting Net Zero targets. [1]

The *Essex Sector Development Strategy Report* also contains sub area analysis of economic data for Essex prepared by the CBI. Braintree is classified as part of

[1] Essex County Council (2022) *Essex Sector Development Strategy* p9

the Haven Gateway sub area consisting of the districts of Braintree, Colchester and Tendring. It states that:

> *According the CBI analysis of government data, the Essex Haven Gateway region has been classed as below average and losing ground – due to it being behind on the majority of metrics when compared to the East of England region.*
>
> *In terms of economic and social outcomes, it is average in terms of household income, has a below average employment rate, is average on the deprivation index and scores one of the lowest for life satisfaction in the East of England.*
>
> *Haven Gateway's local labour market has an average level of schools above standard, a low level of graduates in the workforce, and low levels of people in in-work training. The working age population is projected to grow by 5.1 per cent by 2030.*
>
> *The accessibility of Haven Gateway is also lacking, with low broadband speeds, long commutes, a low level of people able to work from home, compared to the rest of the East of England.*
>
> *In terms of innovation, Haven Gateway has a low number of high growth firms, and very low intensity of exports.* [2]

The North Essex Economic Board (NEEB) is a partnership of district, city and county councils offering business support and skills programmes to nurture economic growth across North Essex. The partnership consists of Braintree, Maldon, Tendring and Uttlesford District Councils; Chelmsford and Colchester City Councils, and Essex County Council. In July 2024, NEEB released *Delivering for North Essex,* which contains two key economic priorities.

> ***Innovative businesses and skilled residents*** *A resilient and outward-facing economy that builds on its incumbent strengths and is positioned to deliver economic opportunities for North Essex's residents, and drive inward investment to support businesses within the region's critical growth sectors.*
>
> ***Dynamic and connected region*** *A well-connected and digitally-linked region that provides residents with quick and reliable access to key services, encourages inward investment, and makes the most of ties to regional and international neighbours.* [3]

Published alongside this document, *Delivering for North Essex's Strategic Narrative* provides detail on the opportunities and challenges NEEB is seeking to action and address. [4] It states that North Essex is positioned to build on the high proportion of SMEs operating within the region, and to further develop strengths in the construction and real estate sectors. "*Alongside reinforcing existing strengths, progress within the region's key growth sectors can add to the region's*

[2] Essex County Council (2022) *Essex Sector Development Strategy* p100
[3] NEEB (2024) *Delivering for North Essex*
[4] NEEB (2024) *North Essex's Strategic Narrative*

innovative business landscape, building on the excellent work that has already been delivered to date." It identifies the following economic opportunities.

> ***Construction and retrofit*** *Braintree has led work on delivering progress within the advanced construction sector through 'I-Construct', including the establishment of a 'Construction Innovation Hub'. This programme has supported 350 businesses, launched 150 new products and services, and created up to 130 jobs across the South East.*
>
> ***Clean Energy*** *Longfield Solar Farm is a proposal for a new solar energy and battery storage farm within Chelmsford and Braintree that will help meet the UK's need for low carbon energy and achieve the 2050 net zero target.*
>
> ***Advanced Manufacturing and Engineering*** *Based in Chelmsford, Teledyne e2v is a technology manufacturer of components and subsystems in the medical, science, aerospace and defence sectors. The company is looking to help drive the next generation of systems in signal chain semiconductor devices, full spectrum imaging, and high power radio frequency solutions.*
>
> ***Digital Tech*** *Colchester launched the AIXR: Centre for Immersive Innovation in June 2022. This new centre will position Colchester as a global focus for all immersive innovation in the XR industry [5], and will form AIXR's base of international operations.*
>
> ***Life Sciences*** *Uttlesford is playing a leading role in the UK's life sciences sector through the Chesterford Research Park, which offers advanced laboratory and office space, with the modern facilities ideal for biotechnology, pharmaceutical and technology R&D companies of all sizes. Braintree's Manufacturing Innovation Centre at CGT Catapult will also play a vital life sciences role, working in collaboration with the cell and gene therapy industry to accelerate manufacturing innovation.*

There are a number of other County-level documents that support the objectives of employment growth in Braintree.

> The *Essex Green Skills Infrastructure Review* (2022) identifies skills gaps and business needs; reviews the capacity of existing providers and growth plans; collates evidence of good practice and references potential development opportunities.
>
> The *Essex Skills Plan 2022-2023* identifies key skills gaps and steps to take to fill these, and outlines short- and long-term actions to enable ECC and its partners to achieve this.
>
> *The Essex, Southend-on-Sea & Thurrock Local Skill Improvement Plan* provides detail on local economy requirements for skills.

---

[5] XR is an umbrella term that encompasses augmented reality, virtual reality and mixed reality technologies.

The *Delivering North Essex* (2023) strategy is founded upon four key strategic priorities.

Construction Growth in Essex 2020-2040 (2020) identifies the potential labour market and skills implications of a predicted boost in construction activity in Essex and surrounding areas.

The *Commercial, Industrial and Larger Footprint Guidance* in the Essex Design Guide establishes a range of high-level principles and more specific and detailed guidance, covering layout; access and parking; materials, character and architecture.

2.3 The Local Plan

The current Braintree Local Plan was adopted in July 2022 and covers the period 2013-33. [6] It includes a shared Strategic Plan with Colchester City Council and Tendring District Council which covers major sub-regional issues.

The vision for the Strategic area starts by stating that, "*North Essex will be an area of significant growth over the period to 2033 and beyond, embracing positively the need to build well-designed new homes, create jobs and improve and develop infrastructure for the benefit of existing and new communities."* (Page 13)

A key element of the spatial growth strategy for North Essex was the development of a new sustainable garden community. Tendring/Colchester Borders, a new garden community will deliver between 2,200 and 2,500 homes, seven hectares of employment land and provision for Gypsies and Travellers within the Plan period (as part of an expected overall total of between 7,000 and 9,000 homes and 25 hectares of employment land to be delivered beyond 2033). More details are contained within the *Tendring Colchester Borders Garden Community Development Plan Document* (DPD) [7] which was subject to Modifications, following an examination in May 2024.

The Local Plan sets five strategic objectives with the economic development objective being most relevant to this study.

> *Fostering Economic Development – to strengthen and diversify local economies to provide more jobs; and to achieve a better balance between the location of jobs and housing, which will reduce the need to travel and promote sustainable growth.* (Page 14)

Policy SP5 on Employment set out the required employment land for Braintree and the other North Essex Districts. This was an allocation of 20.9ha in the 'Baseline' scenario and 43.3ha in the 'Higher Growth' scenario.

Section 2 of the Local Plan is focused on local plan policies for Braintree District. The vision for Braintree is set out as follows.

> *By 2033, the District will be the most successful in Essex. Jobs and businesses will have increased in both quantity and quality, making the District a desirable place to live and work.*

[6] Braintree District Council (2022) *The Braintree District Local Plan 2013-2033*
[7] https://www.colchester.gov.uk/local-plan/tendring-colchester-borders/

> *Housing growth has been achieved, with the expansion of the main town of Braintree providing sustainable, attractive new homes within a market town setting. Witham, Kelvedon and Feering have also continued to expand, making the most of their excellent transport links to provide high-quality homes and new community facilities. Smaller scale growth will continue in other areas of the District, including Halstead, meeting the local needs of smaller, rural communities.*
>
> *The strategic transport routes of the A120, A12 and rail routes from Braintree and Witham have been improved, allowing fast and reliable connections to London, London Stansted Airport, the east coast ports and other key regional centres.*
>
> *Developments in the District will have been designed and built to the highest quality, making the best use of new technologies to ensure suitability and sustainability now and in the future. High-speed reliable broadband is accessible for all homes and businesses.*
>
> *All residents in the District will have access to the highest quality community facilities including health and education provision and green infrastructure. Outstanding leisure facilities continue to be provided to ensure residents can make healthy choices, and retail and other community needs are met. The unique natural and historic environment continues to be protected and enhanced.*
>
> *Braintree District continues to be an aspirational place to live with a successful economy, wide range of affordable, sustainable homes situated within a high-quality urban and rural landscape, all within easy reach of London and the wider region.* (Page 73)

The economic objective of the Local Plan is: "*Creating a successful economy".* This will require the Council to:

> *promote a local economy which supports the growth of existing businesses and encourages new entrepreneurial enterprises and employers to locate in the District, by providing high-quality land and buildings in sustainable locations, to meet the needs of businesses.* (Page 73)

Policy LPP2 on Location of Employment Land states that:

> *All employment sites and sites or buildings in current or recent use as an employment site, will be retained for such uses where they continue to offer a viable and sustainable location for such employment uses*.

It further identifies an additional 42.1ha of employment land in line with Policy SP5 set out above. (Page 87) The sites include the following.

- Extension to Eastways Industrial Estate, Witham – 6.8ha
- Extension to Bluebridge Industrial Estate, Halstead – 2.0ha
- Land East of Great Notley – 3.0ha
- Land East of Broad Road – 3.0ha
- Land at Feering – 4.0ha
- Maltings Lane Business Park – 3.8ha

Policy LPP3 identifies a total of 283.1ha of Employment Policy Areas where changes from B2 or B8 to E (other than E(g) Offices, Research and Development, Light Industrial) will not be permitted. (Page 89)

Policy LPP6 identifies a total of 12.4ha of Business Parks across five sites (Page 93) as follows.

- Blois Meadow Business Centre, Steeple Bumpstead - 0.9ha
- Atlas Works, Earls Colne - 1.5ha
- Threshelfords, Feering - 2.7ha
- Witham Town Centre - 3.5ha
- Maltings Lane, Witham - 3.8ha

Policy LPP7 on Rural Enterprise states that:

> *Outside development boundaries, proposals for small-scale commercial development, which involve the conversion and re-use of existing buildings that are of permanent and substantial construction and capable of conversion without complete re-building, will be considered acceptable subject to all the following criteria:*
>
> *a. The access and traffic generated by the development can be accommodated without adverse impact on the local road network.*
>
> *b. There is no unacceptable impact on residential amenity.*
>
> *c. There is no unacceptable impact on the character of the site or the surrounding countryside and its landscape value.* (Page 94)

Braintree Plan for Growth

The *Braintree Plan for Growth* published in 2017 covered the period 2017-22, so is now out of date but represents the most recent economic strategy document for the District. [8] The document highlighted Braintree's principal competitive advantage as being its location.

> *The Braintree District has one significant competitive advantage – its location. Lying between the regional growth centres of Chelmsford and Colchester; Cambridge as a global technology research and development centre; and the international transport hubs of Stansted Airport and the Haven Ports, the district enjoys a superb location to attract and grow businesses. London is 45 minutes away by rail; and the A120 and A12 trunk roads cross the district giving access to the Haven and Thames ports; Stansted and Southend airports; and the M11, London and the M25.*

Among the factors identified as being barriers to growth were:

- ageing population;
- infrastructure and connectivity;
- skills, and

[8] Braintree District Council (2017) *Braintree District Plan for Growth*

- employment sites – in particular, *lack of grow-on office space for businesses and general employment premises and sites that are at the point of being delivered.*

Strategic priorities to deliver growth were identified as being as follows.

- *Improve road and rail connectivity and public transport.*
- *Provide superfast broadband across all parts of the district and ultrafast for new business sites.*
- *Bring forward strategic employment sites, providing a range of premises for businesses.*
- *Target support to businesses in our growing and emerging sectors with innovation potential.*
- *Work closely with businesses and providers to increase educational attainment.*

Corporate Strategy

The *Braintree Corporate Strategy* [9] is based on three themes: Communities, Prosperity and Environment. Under the prosperity theme, which is most directly relevant to this ELR, the key priorities are identified as follows.

- Ensure district growth is sustainable and accessible with strong connectivity and infrastructure.
- Attract and support business growth, providing high quality employment opportunities in high growth sectors and industries.
- Provide tailored business support and access to funding to help businesses thrive and innovate.
- Develop skills that are attractive to employers and support residents to access opportunities to improve their economic wellbeing.

The strategy states that the priorities will be achieved by developing an "*integrated planning approach that considers the long-term vision for the district, taking into account environmental, social, and economic factors*". The Council also commits to forging partnerships with businesses and industry experts to gain a deeper understanding of market trends, emerging technologies, and industry - specific challenges. It also states that research will help better understand the direction in which the business landscape is moving to provide training and upskilling opportunities.

The Braintree Local Plan also sits in the context of the Essex Minerals Local Plan (2014) and the Essex and Southend-on-Sea Waste Local Plan (2017). These plans set out the policy framework within which minerals and waste planning applications are assessed. They also contain policies which safeguard known mineral bearing land from sterilisation, and existing, permitted and allocated mineral and waste infrastructure from proximal development which may compromise their operation.

[9] Braintree District Council (2024) Corporate Strategy 2024 to 2028 Found at https://www.braintree.gov.uk/council/corporate-priorities-2024-2028

2.4 Employment land policies in neighbouring districts

Employment Land Reviews should be cognisant of employment land policies in neighbouring districts which, in this case, include: Babergh, Chelmsford, Colchester, Maldon and Uttlesford. The last of these reached Reg 18 stage in November 2023 and its evidence base is therefore current. However the other four plans all rely on an evidence base dating between 2013 and 2016. It is therefore questionable how relevant they are to the current study.

Babergh seeks relatively limited growth in employment land, compared to Chelmsford, Colchester and Maldon. In round terms Colchester and Maldon allocate c30ha and c11ha of land for employment use, respectively, while Chelmsford allocates 55,000 sq m of potential employment space.

Babergh & Mid-Suffolk Joint Local Plan 2018-2037 – Part 1 (Nov 2023)

Para 10.02 states that the *Employment Land Needs Assessment* (2016) identified that Babergh and Mid Suffolk have modest net additional employment land requirements equating to approximately 2.9ha in Babergh and 9.4ha in Mid Suffolk, up to 2036. In quantitative terms, there is considered to be adequate land supply through vacant land on strategic employment sites to meet the additional employment land requirements over the Plan period.

> *Policy LP09 - Supporting A Prosperous Economy* Proposals for employment use must (a) be sensitive to the surroundings, including any residential and other amenity, landscape and heritage assets and (b) demonstrate a high standard of design.
>
> *Policy LP10 - Change from Employment Uses* In order to sustain a suitable land supply to meet economic demands, proposals for development will only be approved where the proposal would not compromise ongoing employment use(s).

Chelmsford Local Plan 2013-36 (May 2020)

Strategic Priority 3 refers to fostering growth and investment and providing new jobs. Para 3.8 states that the Local Plan will seek to ensure a flexible rolling supply of employment land over the Local Plan period. Where appropriate, it will support the retention of existing designated employment areas to maintain supply and choice of employment floorspace and rural employment development opportunities.

> *Strategic Policy S6 Housing and Employment* In order to meet the forecast growth in total employment of 725 jobs per annum in 2013-36, the Local Plan allocates development sites to accommodate a minimum of 55,000 sq m of new business floorspace (Use Classes B1-B8), in addition to existing commitments.

Chelmsford City Council has commenced a Local Plan Review to 2041 and consulted on a Regulation 18 Preferred Options document in June 2024, including its future employment land proposals including new strategic allocations. [10] New

[10] Chelmsford City Council (2024) *Preferred Options Consultation Document: Our Planning Strategy 2022 to 2024*

employment growth will be delivered as part of mixed used development on appropriate previously developed sites in Chelmsford Urban Area. Strategic Policy S7 (the Spatial Strategy) directs strategic employment growth to strategic site allocations at

- North East Chelmsford (Chelmsford Garden Community): c60,000 sq m (c600,000 sq ft) of office/business park.
- Waltham Road Employment Area: c4,000 sq m (c40,000 sq ft) B2/B8.
- Little Boyton Hall Farm Rural Employment Area: c6,000 sq m (c65,000 sq ft) of B2/B8.
- A new garden community to the east of Chelmsford (Hammonds Farm): c45,000 sq m (c460,000 sq ft) of business space.
- Land adjacent to Junction 18 of the A12:c45,000 sq m (c460,000 sq ft) business space.
- South Woodham Ferrers: c1,500 sq m (c15,000 sq ft) business space.
- Chelmsford Urban Area - 4,000 sq m c(40,000 sq ft) Use Class E(g)(i-ii)
- East Chelmsford: c5,000 sq m (c50,000 sq ft) office/business park.

Colchester Local Plan 2017-2033 Part 2 (July 2022)

Para 3.27 notes that the Council's Employment Land Needs Assessment of January 2015 updated the evidence base to facilitate the provision of appropriate employment to reflect current trends, market changes and projections for the plan period. Para 3.29 stated that as part of the preparation of the Local Plan a full review of the unimplemented Strategic and Local Employment sites has been considered, informed by the ELNA. The resulting employment land allocations provide for a total of 28.5ha of B use employment land in Strategic and Local Employment Areas and a further 3.5ha of B use employment land in the Garden Community within Colchester during the plan period.

> *Policy SG3: Economic Growth Provision* The Local Planning Authority has allocated 32ha of land to plan for the delivery of employment land (principally Class B2, B8 uses, supporting Class E uses and any associated employment generating sui generis uses) in Colchester Borough up to 2033. An additional 3.5ha of employment land is expected to come forward in Colchester … with a further 25ha to be allocated in the overall Garden Community for development post-2033.

Maldon District Approved Local Development Plan 2014-2029 (July 2017)

To support the Council's Economic Prosperity Strategy which seeks to achieve a strong, responsive and competitive local economy, Policy E1 in this plan allocates a total of 11.4ha of new class B use employment land and planned as part of the South Maldon Garden Suburb, as part of the West of Burnham-on-Crouch Strategic Allocations, and at rural sites in Great Braxted (Commodity Centre) and Stow Maries (Great Hayes Business Centre).

> *Policy E1 Employment* The Council will encourage employment generating developments and investment in the District to support the long term growth vision outlined in the Council's Economic Prosperity Strategy. A minimum of 2,000 net additional jobs will be created in the District by 2029.
>
> This will be achieved through the regeneration, modernisation and expansion of existing employment sites, and through the provision for new employment

> sites at the strategic allocations and South Maldon Garden Suburbs and other high quality and sustainable locations, including town centres, education and health facilities and with regard to other policies in this Plan.

Policy E1 identifies 94.21ha of existing employment use, and allocates a further c11.4ha, across five sites, for employment development.

Uttlesford Draft Local Plan 2021-2041 Reg 19 (July 2024)

The Strategic Objectives as applied to the economy are listed on page 35, and aim to allocate sufficient land to accommodate development needs.

> SO7: Recognise the influential role of the District's employment offer, including the international gateway of Stansted Airport, including the Northside development and the research and development offer at Great Chesterford Research Park, by embracing the planned expansion, whilst seeking to maximise their sustainability and infrastructure delivery.

> SO8: Foster sustainable economic development opportunities by promoting a strong, diverse, resilient, sustainable, and competitive economy, supported with a range of rewarding employment and learning opportunities and a multi-skilled workforce in a range of sectors including tourism, high-tech, biotech, research and development, aviation, sustainable agricultural and rural business.

Core Policy 4 of the Plan, *Meeting Business and Employment Needs* states that over the Plan period 2021 – 2041 the land requirement for office and R&D development is 21.7ha and industrial development is 52.2ha. In order to meet this requirement, a further 14.6ha is needed for office development and R&D and 31.5ha is needed for industrial development beyond known completions and commitments. A total of 57.5ha is identified for future development.

Core Policy 45: *Protection of Existing Employment Space* states that existing employment areas will be safeguarded for offices, warehouses, workshops, industrial and complementary sui generis uses. Proposals which promote development or reuse of vacant sites located within existing employment areas for employment use will be supported subject to their degree of compliance with other relevant policies in the Plan.

Summary

The planning policy framework from national down through sub-regional to local district level is all very supportive of growth. Neighbouring authorities are also planning for growth albeit the scale of growth will depend on what happens with the Garden Community proposals.

The Braintree Corporate Strategy is to ensure that growth is sustainable and accessible; that it provides high quality employment opportunities in high growth sectors; helps businesses to thrive and innovate; and develops skills to support residents to improve their economic wellbeing.

3.0 Issues facing spatial planning

Rapid developments in technology and business, together with a sharp focus on the environment and changing social expectations in the workplace have in recent years created a highly uncertain context for Local Plan making.

Against the backdrop of widespread, rapid and profound change, an Employment Land Review must look forward 15-20 years to consider future requirements for land and buildings. When the fundamentals of the economy and work are undergoing profound change, as they are at the current time, using today's evidence to project tomorrow's needs is an exercise that is fraught with difficulty.

In order to recognise the significance of the changes taking place, and to be cognisant of them in the forecasts made within this report, this section sets out a little more detail on some key changes affecting future needs in employment space.

3.1 Changing nature of demand for employment space

Offices

The Covid-19 pandemic caused a major reassessment of the role and function of office space. One of the most significant outcomes has been the establishment of 'hybrid working' as a modus operandi for most office-based businesses. This is a continuation of a trend (agile working') rather than an entirely novel development; but the significance lies in its apparent ubiquity and acceptance in the post-pandemic world.

It is likely that hybrid working will lead many companies to reduce their real estate footprints. Space budgets will be reassessed in the light of expectations that people might work in the office three days per week. This will be somewhat ameliorated by the priority for a healthy environment (e.g. lower density) and by economic growth. There is not likely to be a precipitous fall in demand for office space.

Demand for office space is likely to be driven by an emphasis on location – being in a 'place' that has identity, a pleasant environment, support services and access to bars, cafes, restaurants and so on. Large, pre-1980s building stock will increasingly fall out of favour as it fails to meet modern business needs as well as falling short in terms of Minimum Energy Efficiency Standards.

The workplace has a key social function, not to mention areas such as training, mentoring, leadership, corporate ethos and so on. These needs have not disappeared. Interior space will be managed to support hybrid working and to provide a quality 'experience' for when people are in the office, using activity-based settings. Offices will be designed and managed to be attractive to staff. Better air quality, more focus on hygiene and health and wellbeing, and lower desk densities will be just some of the 'new normal'. There will be a stronger focus on social, meeting and collaboration space, alongside service provision.

Braintree has a small office market and it is unlikely that broader trends will have a major negative impact on demand. Braintree is not an established market for large corporate demand, a situation that is very unlikely to change. In this context, it is important that spatial policy focuses on the need to provide modern, flexible floorspace for SMEs in town centres and in bespoke rural locations. Such office occupiers are generally seeking flexible space, both in terms of configuration and contract. They prefer to be located in 'business communities' rather than being isolated.

Flexible space The flexible space market is primarily the outcome of changing working styles, mobile technology, economic uncertainty, a rapidly changing business landscape and growing knowledge-based work. Flexible space allows businesses to match their changing real estate footprints to their rapidly changing business dynamics. Shorter leases, often licenses, are central to the flexible model, together with 'easy-in, easy-out' terms and a level of service provision. The range of flexible products includes serviced offices, coworking, maker spaces, managed spaces and studios.

The pre-pandemic shift to 'flex space' is likely to accelerate as firms seek great adaptability. SMEs form the backbone of flex demand in most locations and they require the service-driven approach of flex operators. Flexible terms ('easy-in, easy-out') are paid for with a fixed, 'unitary charge' that is all-inclusive (rent, rates, service, technology, etc.), without onerous exit terms (such as dilapidations). Another key attractor is the ability to 'flex', or grow/shrink in terms of space occupied. Whether the customer is a company in early growth phase and looking to scale-up, or a larger corporate looking for project/temp space, or space to establish a foothold in a new city, the appeal is strong.

Flexible office space is evolving from 'minority interest' to 'mainstream'. Average institutional lease lengths have now shrunk to 6-7 years, and landlords are increasingly recognising the need to provide additional services and less onerous leases. Flexible space will be seen as part of a convenient, low-risk solution for businesses exploring different ways of working, particularly hybrid or 'hub-and-spoke', both of which no longer require people to commute daily to a single office, instead using of a variety of spaces/locations for work.

Town centres In addition to their impact on the B-space market, the drivers of change are also responsible for the changing nature of retail and leisure in town centres. As traditional retailing retreats and shop vacancy grows, the key strategy will be to revitalise town centres with social and economic activity. Bringing employment, in the form of office space, back to the town centre will be an integral ingredient, and this will require improving the quality of the experience with sensitive 'place making'. Bringing housing back to the town centre will also be important.

The challenge is to maintain and improve the design quality of high streets, while reintroducing a wider range of uses. High streets will have to provide for work, including business centres, offices, light industry, studios and so forth. They must offer a range of food and beverage outlets, culture and leisure and health and wellbeing. They must provide genuinely mixed-use buildings and restore the role of community functions such as open space, meeting places, leisure centres, places of worship, markets and public transport hubs. They must seek multi-generational appeal, recognising the demographic and cultural diversity, and cater for working families.

Braintree retains some historic character and has many of the ingredients for a successful town centre. This should be nurtured with a town centre strategy that recognises a multitude of uses, including employment in office space.

Industrial

Traditional industrial (manufacturing) activity has been in terminal decline for many years. Over the past three decades the economy has become dominated by the service sector; amply demonstrated by the fact that manufacturing (industrial) employment has shrunk by almost four-fifths since the mid-1980s, while financial and business services jobs more than doubled.

Consequently, much ‘industrial’ employment space is now occupied by firms who are product and service based, rather than producers *per se*. This is as true in Braintree as it is anywhere else. The majority of industrial buildings are now occupied by businesses that require higher specification, flexible space, often with office content. Indeed, many industrial premises today are occupied by non-industrial businesses, with much employment on designated sites of a non-industrial nature.

Many of the activities in these buildings comprise a blend of production, storage, office, creative and sales space. In other words, they are occupying mixed activity space, undertaking activities that do not fit neatly into one of the traditional Use Classes.

Braintree has a high concentration of industrial space, much of which is relatively modern. It will be important to attract new investment to ensure that older stock is modernised to suit today’s business needs.

It is also important to recognise that many SMEs in the industrial sector find it difficult to find suitable premises, particularly smaller units on flexible terms. In the context of rapid change and uncertainty, it will be important for Braintree to nurture investment in start-up and affordable units.

Logistics The logistics market has grown spectacularly in recent years, both in terms of its overall size and in terms of the average size of units. This process can be clearly seen at Horizon 120 in Braintree. The large logistics facilities are often fully automated with high bay racking, sometimes in total darkness with only the whirring of environmental systems and robotic machines.

As an example, in March 2018, specialist developer Gazeley launched its latest speculative development, the Altitude building at Magna Park, near Milton Keynes. At 53,300 sq m and 21m clear eaves height, the building is both the largest and tallest speculative logistics facility in England. The building has sufficient height for ground plus ten rack levels, and a floor loading of 80 KN per sq m. It has 117 dock levellers, with double deck loading doors in every position, at a ratio of one door per 450 sq m, reducing time as well as financial and environmental operating costs for occupiers.

Perhaps of even greater interest has been the recent interest in multi-storey warehouses. Rising land values and land shortages (in some areas) are leading developers and operators to consider vertical schemes. Multi-storey warehouses are well-established in Asian cities such as Hong Kong and Singapore where land values have justified the investment, but they have been less favoured in European real estate markets.

While the largest logistics buildings are unlikely to be required in Braintree, and while the pressure for multi-storey is less intense, the demand for logistics buildings is likely to remain high for some years.

Hybrid buildings As indicated above, many occupiers today undertake a mix of activities in their buildings. In response the market has begun to provide mixed use buildings that have the internal flexibility to respond to a range of user profiles.

The number of floors in hybrid buildings normally varies between one and three, with two being typical. Many purpose-built buildings are constructed as single-storey, double height space with the capability of accommodating a mezzanine floor. Ideally, a mix of single and double height space also permits different kinds of uses. Proportions will vary, but for generic guidance, perhaps, two-thirds of the space at 4.5m high, and a third at 6-8m for storage, studios, production, and so on. The higher dimensions allow pallets to be racked six high.

A depth of 13-18m is adequate to cater for most needs, allowing reasonably deep open plan areas, while also giving sufficient depth to allow different configurations of sub-division. The ability to erect and dismantle partitions to suit changing needs as product lines and volumes change is important.

Temperature control systems and energy management are important factors. While partitions and temperature control systems are often in conflict, the key is a creative solution to the configuration of single and double height space. Lighting is generally less of an issue, so long as natural lighting is good: a basic lighting system can be inexpensively supplemented by the occupier to suit specific needs. Secure power supply and data linkages are increasingly important to occupiers.

Despite the enormous variety of potential occupiers and activities of hybrid buildings, it is possible to prepare a typology of activities and their appropriate key specification features (Figure 3.1). The table shows four generic demand functions, each reflecting a slightly different use profile and specification requirements.

Figure 3.1 Four categories of use and their specification priorities

Occupier priorities			
Production	**Client-facing**	**Workshop**	**Goods handling**
Power supply	Quality image	Natural light	Eaves height
Fire protection	Comfort	Comfort	Loading bays
24-hour operation	Accessibility	Security	Column free
Security	Security	Car parking	Secure yard
Retail trade	Car parking	Local amenities	Turning space
Parking & access	Local amenities	Power supply	Parking
Management regime: short leases; flexible terms (easy-in, easy-out); customer focus; support with change; support services; focus on public realm			

Source: Ramidus Consulting

The four generic types are not exhaustive, but illustrative of a principle, and can overlap within a single occupation. The proportions of each type of space will vary according to the occupier, emphasising the need for building flexibility, and for a sympathetic ownership/management approach.

3.2 Implications of UCO and PDR

Throughout this report, where reference is made to Use Classes B1, B1(a) B2 and B8, it should be noted that Class B1 has been replaced by new class E(g)(i) offices, E(g)(ii) Research & Development and E(g) (iii) light industry. The main reason for continuing to use the 'B' designation is to allow direct comparison of multiple data sets either side of the changes made in 2020.

Use Classes Order and the Class E

In April 2020, the Government announced significant changes to the use classes system in England (Use Class Order 1987) through the new Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020. The main driver of change has been a perceived need to enable the repurposing of buildings on high street and town centres. The changes to the UCO in England will have a substantial impact on town centres particularly where there is significant office and light industrial stock.

The main change is the abolishment of Use Classes A1, A2, A3, A4, A5, B1, D1 and D2, and the introduction of three new use classes (E, F1 and F2). The most significant change is the creation of a new "Commercial, Business and Service" use called "Class E". This brackets together a wide variety of uses into a single use class. The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged, except for a new cross-reference in the B2 class to the new Class E.

The new E category use class for 'commercial, business and services' is a very broad-ranging use class, incorporating retail space (use classes A1-A3), office space (B1), as well as other elements including research and development facilities; industrial uses; elements of the previous D1 Use Class including clinics, health centres, crèches, day nurseries and day centres, and elements of the previous D2 Use Class, including gyms and most indoor recreations. The A4 (pubs or drinking establishments) and A5 (takeaways) have moved to the *sui generis* category.

Class E is defined as being use, or part use, for all or any of the following operations.

> *a) Display or retail sale of goods, other than hot food, principally to visiting members of the public* [old A1];
>
> *b) Sale of food and drink principally to visiting members of the public where consumption of that food and drink is mostly undertaken on the premises* [old A3];
>
> *c) Provision of the following kinds of services principally to visiting members of the public* [old A2]: (*i) financial services; (ii) professional services (other than health or medical services), or (iii) any other services which it is appropriate to provide in a commercial, business or service locality;*
>
> *d) Indoor sport, recreation or fitness, not involving motorised vehicles or firearms, principally to visiting members of the public* [elements of old D2];
>
> *e) Provision of medical or health services, principally to visiting members of the public, except the use of premises attached to the residence of the consultant or practitioner* [elements of old D1];
>
> *f) Creche, day nursery or day centre, not including a residential use, principally to visiting members of the public,*
>
> *g)* [old B1]: (*i) an office to carry out any operational or administrative functions,* [B1a]; (*ii) the research and development of products or processes* [B1b] *or (iii) any industrial process* [B1c]*, being a use, which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.*

B2 General Industrial applies to use for an industrial process other than one falling within class E(g), *previously class B1,* excluding incineration purposes, chemical treatment or landfill or hazardous waste. Sui generis (in a class of its own) applies to a range of activities, including but not restricted to: theatres, arcades, launderettes, waste disposal, including incineration, nightclubs, betting shops and cinemas.

As stated above, the changes are largely a response to trends in the retail sector and their impact on the vitality of high streets. In principle, the changes will enable greater flexibility in how buildings are used within town centres; but previous experience has also shown that the impact can have unintended consequences. For example, a significant amount of office space was converted to residential following the previous extension of PDR in 2013, benefitting town centre living but exacerbating shortages of office space in some markets.

Of course, one of the greatest impacts of the changes, with such a broad range of uses within the single new class E category, will be on the ability of local authorities to control the nature and occupier combination within their centres. The effect of the changes will be to leave town centres uses largely to short-term market forces. There will also be implications away from town centres, in particular, change of use from office to residential and potential loss of B1 allocations to residential putting at risk the ability of local planning to meet longer term employment needs.

As already noted above, there can be little doubt that the nature and purpose of the high street is changing dramatically. The positive interpretation is that the changes offer greater flexibility for the occupational mix of high streets to respond more quickly to the unprecedented and unpredictable changes in occupational demand currently affecting high streets. As outlined above, there is an opportunity to bring a great range of activities to town centres which should, in turn, make them more resilient to change in any one direction.

Permitted Development Rights

In parallel with the changes to the Use Class Order, the Government implemented, a series of changes to PDR. In summary, the following additional permitted development rights were made available.

- From 31 August 2020, a new permitted development right allowing the demolition and rebuilding of "vacant and redundant" office and light industrial buildings into dwellings, without planning permission.
- From 31 August 2020, new permitted development rights to enable the upward extension, by up to two storeys of existing post-war homes. These rights were also extended to include the creation of new homes above terraces, offices and shops, without planning permission.
- From 1 August 2021 a powerful new permitted development class, MA (Mercantile to Abode) took effect. This adds some restrictions to changes from Class E to residential, including, inter alia, the requirement for business space to be vacant for at least three months, to be in continuous Class E use for two years at the time of application and limiting the floorspace that can be changed to 1,500 sq m (16,150 sq ft) in any one building.

As previously, both rights require that prior approval is sought from the local authority in terms 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.

It is important to recognise that the revised PDR will be conditional upon the building:

- having a floorspace of no more than 1,500 sq m (16,150 sq ft);
- being vacant for at least three months before seeking prior approval;
- having been in Class E for two years before benefitting from the right;
- not being listed, nor being within the curtilage of a listed building; and

- not being within a protected or designated area (i.e. AONB, National Park, the Broads, World Heritage Site, SSSI or Scheduled Monument), with the notable exception of Conservation Areas, where the right will apply.

The key constraint is that the upward extension rights will only apply to existing residential dwellings or purpose-built, detached blocks of flats. Mixed-use buildings will not benefit from these new rights.

In August 2023 the then Conservative Government issued a consultation document on proposed changes to the PDR. The main changes relevant to employment land included the following.

- The limitation of 1,500 sq m of floor space was proposed to either double to 3,000 sq m or be removed all together. This would allow for larger buildings to be converted, such as department stores.
- Removal of the requirement for the property to be empty for three months before application.
- Enable conversion from C1 hotels to residential.
- Currently Class R allows an agricultural building to convert to any use in B8, E and C1. The proposal is to extend this to include outdoor sports, recreation and fitness.

It is unclear at the time of writing whether or not the new Government will seek to amend PDR.

3.3 Summary

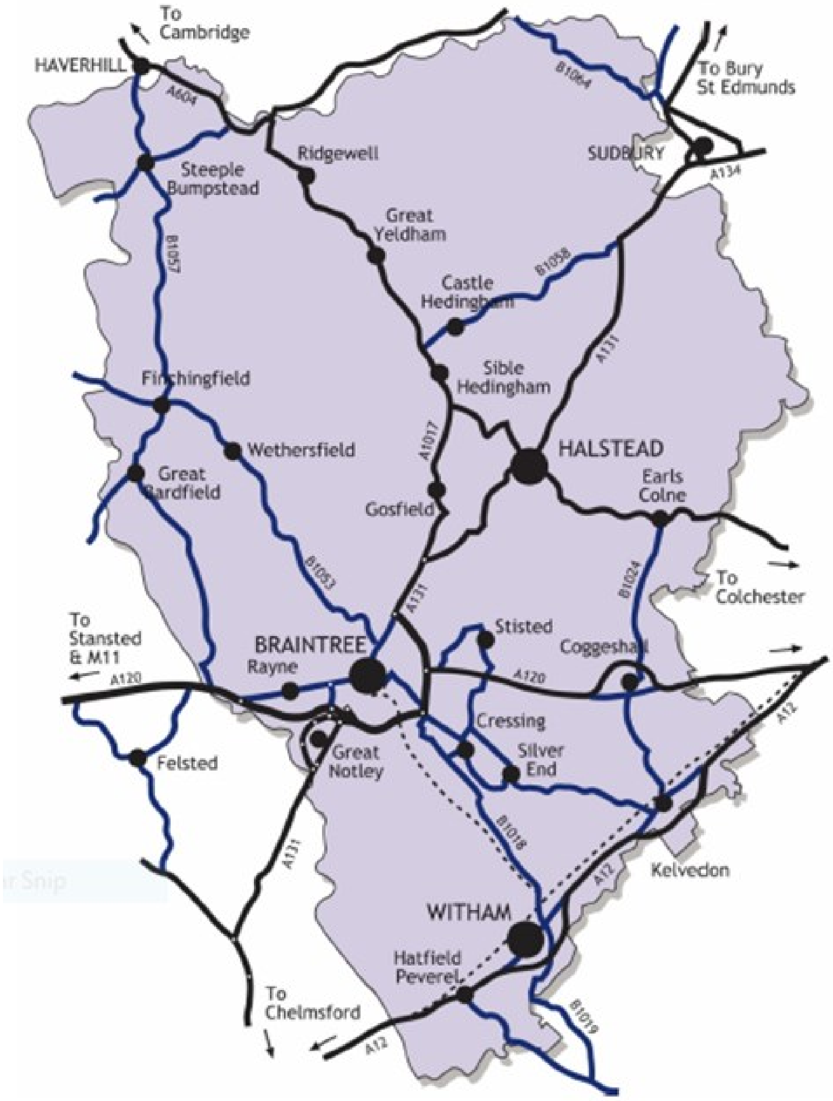
The context for Local Plan making in 2024 is one of uncertainty, caused by rapid economic, environmental, social and technological changes. Looking 15-20 years ahead, as Local Plans are bound to do, becomes ever more difficult. When the fundamentals of the economy and work are undergoing profound change, as they are at the current time, any projections are fraught with difficulty.

Nevertheless it is clear that current dynamics will have major implications on the demand for employment space. Spatial planning will need to keep abreast of changes and be capable of responding in a flexible manner to changing patterns of demand. For example, the recent introduction of the ‘E’ Use Class has significant implications for the nature of the business sector, given that planning permission is not required for changes of use within the same use class. This is potentially helpful in the regeneration of failing high streets but it must be used in positive manner to nurture change.

4.0 Socio-economic profile

The district of Braintree includes three main towns (Braintree, Witham and Halstead) and five key service villages. Half of the population is classed as rural, and half of the District's jobs are in the three main towns.

Figure 4.1 Braintree District



The *Economic Growth Strategy 2023-2028* points out that the district's main towns, Braintree, Witham and Halstead are "*critical components of the district's overall economy, supporting 55% of employment across the district*". It further notes that Braintree and Witham are the two largest centres in the district (supporting 14,780 and 11,325 jobs respectively) and have a range of strengths in wholesale and retail, construction and manufacturing.

The same report pointed to evidence that 45% of employment opportunities come from more rural areas within the district, "*showcasing that rural businesses play a significant part in the district economics and therefore, resources also need to be made available to support these employment opportunities*".

The Growth Strategy also observed that while in the past, the Manufacturing, Construction and Retail sectors had been strong, there has been a shift over recent years to emerging core growth sectors, including Professional Services and Health.

Braintree is the largest town in the District, being home to over 40,000 residents and providing around 15,000 jobs – around one-quarter of all District jobs. Unsurprisingly Wholesale & Retail trade, followed by Construction, Health and Education are the largest employment sectors. Although Professional Services and Health have seen strong growth, other sectors have been stagnant or in decline. The town is home to a large 'designer outlet village', Braintree Village, as well as three large concentrations of industrial activity, namely Springwood Industrial Estate, Park Drive Industrial Estate and Broomhills Industrial Estate.

Witham is the second largest settlement in the District with around 25,000 residents and c11,000 jobs. The town centre has two shopping centres, Newlands Shopping Centre and Grove Centre. The town is comparatively well-connected being adjacent to the A12 and having a Great Eastern rail station with connections to London, Chelmsford, Colchester and Ipswich. There is a large industrial area to the north east of the town centre.

Halstead is the smallest of Braintree's main settlements, with around 12,000 residents and 4,125 jobs. Halstead has grown more rapidly than the other main centres in recent years, with particularly strong growth in Professional Services, Construction and Health. A large industrial estate Bluebridge Industrial Estate is situated to the east of the town.

4.1 Functional Economic Market Area

National Planning Practice Guidance recommends that Employment Land Reviews take account of the economic context within which the administrative area under question sits. This is known as the Functional Economic Market, or FEMA. Such an area is not constrained by administrative boundaries but rather reflects the way the economy works; the relationships between where people live and work, the scope of service market areas and catchments. For example, businesses searching for sites or premises will typically consider a number of similar locations in a given area unconstrained by administrative boundaries.

The previous employment study, by Aecom in 2015, referred to the wider area as the Property Market Area, or PMA. [11] The study defined the FEMA/PMA as comprising Braintree, Chelmsford, Colchester and Uttlesford, based on the view that it reflected

> *the strong crossover in labour between Braintree District and Colchester, and the large degree of out-commuting by Braintree residents to the regional economic hubs of Chelmsford and London Stansted Airport. It also follows the established linkages across the A120 Haven Gateway, and reflects the low degree of commuting between Braintree District and local authorities to the north, such as Babergh, St Edmundsbury and South Cambridgeshire.*

The current study takes a largely similar perspective. We have included Uttlesford, while recognising that economic links are relatively small (the whole Uttlesford

[11] Aecom (2015) *Braintree District Employment Land Needs Assessment*

district accounts for only c5% of Braintree residents' jobs), simply because of the presence of Stansted Airport there and the future potential for stronger links.

We concur with the Aecom study that there is little merit in including local authorities to the north, such as Babergh, St Edmundsbury and South Cambridgeshire. It is in fact very difficult to describe a coherent FEMA for Braintree. Travel-to-Work Area (TTWA) data do not help because Braintree is part of the Chelmsford TTWA and so distinct patterns are not possible to identify. According to the 2011 Census, 36.2% of Braintree resident's jobs are in Braintree, 9.2% are in London, and Chelmsford and Colchester account for 9.2% and 4.9%, respectively.

Given the above, we have placed our FEMA analysis in the context of Braintree Chelmsford, Colchester and Uttlesford.

4.2 Demographics

Braintree has a population of 155,700 (2021), which has grown from 151,000 in 2015 and 146,000 in 2010. Since 2010, the Braintree population has grown slower than the East region and slightly faster than the national rise. The Office for National Statistics (ONS) 2018-based population projections suggested a 2021 population of almost 153,000 (slightly less than unfolded) would grow to 156,216 by 2030 and to 158,179 by 2035.

The District's economically active amount to 77,400 (December 2023). At 79.1%, this compares closely with the East region (80.6%) and nationally (78.8%). In this sense Braintree has a smaller economy than either Chelmsford (100,600) or Colchester (94,800). Almost 56% of Braintree employment is managerial and professional, which is slightly higher than the regional and national levels (Figure 4.2). However, beyond this, the breakdown is unclear.

Figure 4.2 Employment by occupation, residents, 2023

Occupation	Braintree (Numbers)	Braintree (%)	East (%)	GB (%)
Soc 2020 Major Group 1-3	40,600	55.6	53.5	52.9
1 Managers, Directors & Senior Officials	9,500	12.8	12.4	10.8
2 Professional	21,900	29.5	25.8	26.9
3 Associate Professional	#	#	15.2	15.2
Soc 2020 Major Group 4-5	10,500	14.3	19.5	18.3
4 Administrative & Secretarial	#	#	10.6	9.5
5 Skilled Trades	#	#	8.8	8.7
Soc 2020 Major Group 6-7	14,900	20.4	13.9	14.2
6 Caring, Leisure & Other Service	#	#	7.7	8
7 Sales & Customer Service	#	#	6.2	6.2
Soc 2020 Major Group 8-9	#	#	13	14.6
8 Process Plant & Machine Operatives	!	!	4.8	5.4
9 Elementary	#	#	8.1	9.2

# denotes not statistically significant; ! denotes estimate is not available since sample size is disclosive

Source: NOMIS

Overall, Braintree has significantly fewer in Major Groups 4 and 5, which includes skilled trades. It might be expected that these would be significantly higher given the extent of industrial estates across the District. Similarly, there is no data for Braintree for Major Groups 8 and 9 which is unexpected for the same reason. However, Groups 8-9 will be less than 10%, which is lower than the national or regional average. Between these two, Braintree appears to be over-represented in Major Groups 6 and 7, (20.4% compared to a regional level of 13.9%).

The claimant count in Braintree in May 2024stood at 2.8%, which compares favourably with both regional (3.1%) and national (3.9%) averages. In terms of qualifications, Braintree's workforce is relatively under-represented at RQF4 and above, and relatively over-represented at RFQ1, although the margins are slim in both cases.

Figure 4.3 Qualifications, 2023

Qualification	Braintree	Braintree (%)	East (%)	GB (%)
RQF4 And Above	38,800	41.7	42.8	47.3
RQF3 And Above	60,200	64.7	64.7	67.8
RQF2 And Above	79,400	85.3	88	86.5
RQF1 And Above	85,600	92	90.9	89
Other Qualifications	!	!	3.8	4.6
No Qualifications	4,200	4.5	5.3	6.5

Source: NOMIS

Average earnings of Braintree residents are lower than the regional average, but higher than the national average. Female full-time workers are paid significantly less in Braintree than either the regional or national averages. It should be stressed that the data reflect what residents earn – wherever they work – not what jobs in Braintree pay.

Figure 4.4 Median weekly earnings, 2023

Gross Weekly Pay	Braintree (£s)	East (£s)	GB (£s)
Full-Time Workers	695.2	705.7	682.6
Male Full-Time Workers	754.8	755.6	728.3
Female Full-Time Workers	607.6	635.3	628.8

Source: NOMIS

The *Economic Growth Strategy 2023-2028* notes that the district has an aging population, with 41% of the population aged over 50, while the growth of the working-age population has slowed over the past decade. The latter trend is a national one, but since 2009, there has been a decline in the working age population in the district – in contrast to strong growth across all other local areas. The *Strategy* observes that this decline is important in relation to the district's economy given the need to ensure that the employment needs of local firms can be met.

Journeys to work The location of work is an important factor in analysing the extent to which the employment opportunities within Braintree District fulfil the economic needs of its residents. Unfortunately the pandemic overlapped with the 2021 Census, which, because of the lockdowns, produced atypical travel-to-work patterns. As a result, we have analysed the 2011 TTWA data as described in Aecom's *Employment Needs Assessment* of 2015. While a little dated, and while there might have been some changes, the overall pattern will provide a helpful overview of daily commuting patterns.

Figure 4.5 provides a breakdown of the District's workforce by place of residence. It demonstrates that the majority (approx, two-thirds) of individuals employed in Braintree District also reside there. The location of in-commuters also gives an indication towards the local focus of Braintree's economy, with each of the five largest sources of workers coming from neighbouring local authorities.

Figure 4.5 Place of residence of Braintree District's workforce

Place	Number	%
Braintree	26,964	63.9
Colchester	3,617	8.6
Chelmsford	2,634	6.2
Maldon	1,339	3.2
Babergh	1,142	2.7
Uttlesford	886	2.1

Source: Aecom, 2016

By contrast, Figure 4.6 presents a breakdown of the District's residents' place of work, and shows that, of all residents in employment, over a third (36.2%) also work in the District. Thus a majority of residents travel to other areas to work. One cause of this might be commuting to areas/jobs where earnings are higher than locally; another might be the relatively low number of jobs available.

Aecom point out that as those working and living in the District equate to a third of working residents but two-thirds of the workforce, there are approximately two working residents for every job in the District.

Figure 4.6 Place of work of Braintree District's residents

Place	Number	%
Braintree	26,964	36.2
London	6,880	9.2
Chelmsford	6,854	9.2
Uttlesford	3,830	5.1
Colchester	3,665	4.9
Maldon	1,363	1.8

Source: Aecom, 2016

In terms of the destinations for out-commuting, the largest proportion of residents leaving the District commute to London (6,880 or 9.2% of employed residents). In addition, there are significant outflows of employees to Chelmsford (6,854, 9.2% of employed residents), Uttlesford (3,830, 5.1% of employed residents) and Colchester (3,665, 4.9% of employed residents).

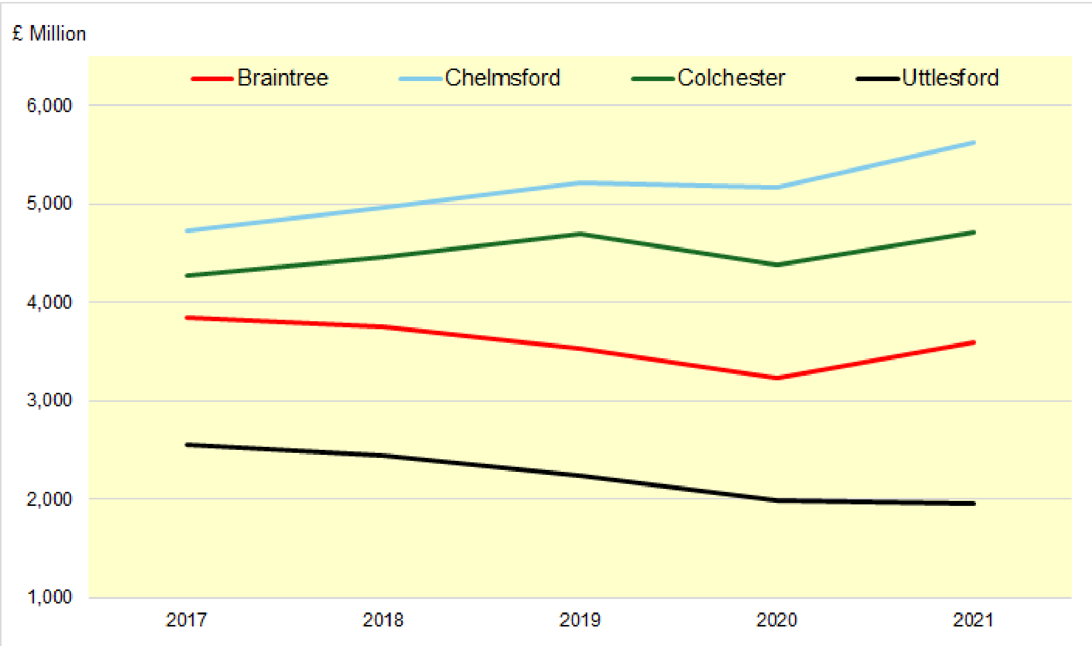
Aecom also acknowledge importance of Stansted Airport (Uttlesford) in providing jobs for Braintree residents. Whereas there is a relatively low influx of workers from Uttlesford (886), many more commute to this area (3,830). By contrast, there is little crossover to the north of the District; the small proportion of residents commuting out to nearby areas such as Haverhill and Cambridge suggest that linkages to the north form a small influence on the District's economy.

4.3 Economy

The following section compares Braintree's economy to the surrounding economies of Chelmsford, Colchester and Uttlesford.

Gross value added Gross value added (GVA) measures value generated (output) by organisations engaged in the production of goods and services; it is thus a measure of the size of an economy. The Braintree district economy produced almost £3.6bn of output in 2021 (Figure 4.5). This compares to the larger economies in Chelmsford (£5.6bn) and Colchester (£4.7bn). As can be seen from Figure 4.5, GVA had shrunk in each of the previous three years (with only 2020 being affected by the Covid pandemic). Output was £3.85bn in 2017.

Figure 4.5 GVA in Braintree compared to comparator districts, 2017-2021

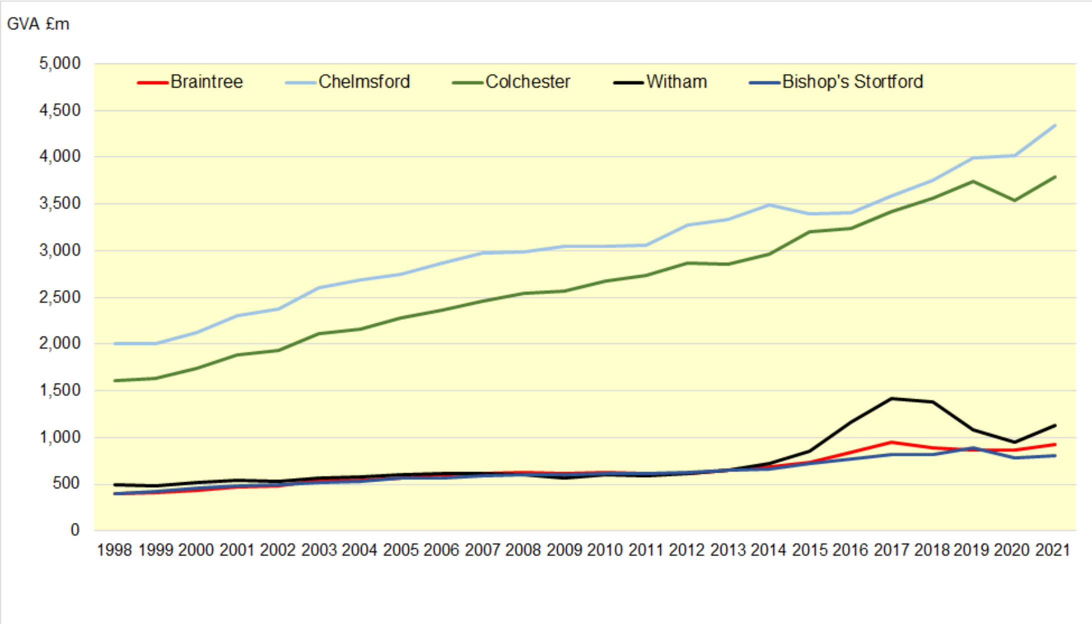


Source: NOMIS, 10th July 2024

The ONS also produces GVA data at the town (rather than district) level (Figure 4.6). This shows a number of significant points over and above the data in Figure 4.5. First, Braintree and Bishop's Stortford have the smallest economies. Secondly, Chelmsford and Colchester have over the long-term both grown strongly by comparison with the other towns. Thirdly, Braintree has seen the weakest growth of the comparator towns, while seeming to be unaffected by the pandemic.

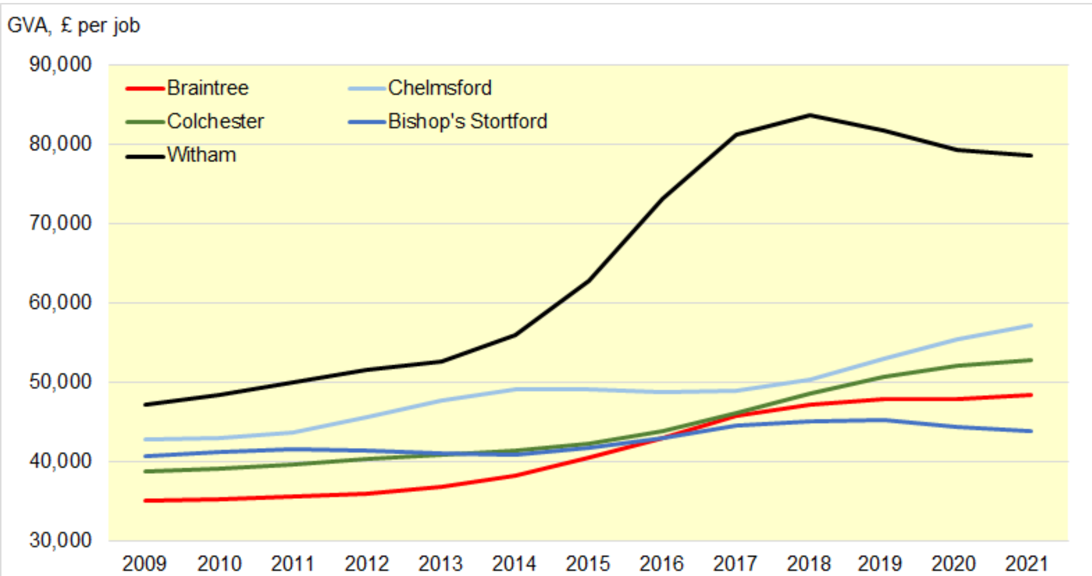
Overall the data suggest that Braintree district's rural economy and secondary towns (principally Witham) are more significant than in the other districts. One further breakdown shows GVA per job across the three district towns and the comparator towns (Figure 4.7). The most notable feature of this breakdown is the disproportionately strong performance of Witham, for which there is no clear explanation. Over the period, Braintree has grown by 2.3, compared to Colchester at 2.3 and Chelmsford at 2.17.

Figure 4.6 GVA in Braintree town compared to comparator towns, 1998-2021



Source: ONS [12]

Figure 4.7 GVA per job, 1998-2021



Source: ONS [13]

[12] Gross value added and productivity statistics for other geographical areas, 31st Jan 2024
[13] Gross value added and productivity statistics for other geographical areas, 31st Jan 2024

Employment In another measure of the size of the economy Figure 4.8 shows the number of jobs in Braintree district and surrounding districts. Braintree provides 54,000 employee jobs, while Chelmsford and Colchester have 89,000 and 84,000, respectively. Braintree has an economically active population of 77,400. Figure 4.9 shows a breakdown of employment and unemployment in Braintree compared to East region and GB. As a proportion of all, the economically active in Braintree are very similar to regional and national averages. The unemployment rate of 3.5% is also very similar to regional and national levels.

Figure 4.8 Employee jobs, 2022

District	Employee jobs
Braintree	54,000
Chelmsford	89,000
Colchester	84,000
Uttlesford	45,000

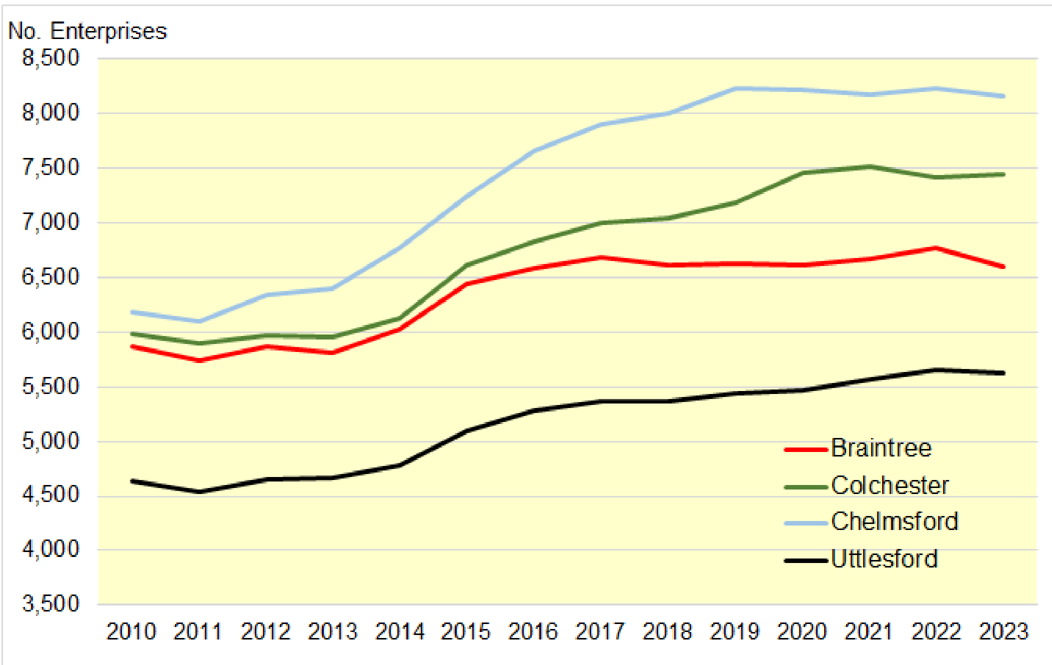
Source: NOMIS

Figure 4.9 Employment and unemployment, 2023

All people	Braintree (No)	Braintree (%)	East (%)	GB (%)
Economically Active	77,400	79.1	80.6	78.8
In Employment	74,100	75.6	77.5	75.8
Employees	69,400	71.3	67.6	66.3
Self Employed	#	#	9.7	9.3
Unemployed	2,700	3.5	3.6	3.7

Source: NOMIS

Figure 4.10 Number of firms, 2010-2023



Source: NOMIS

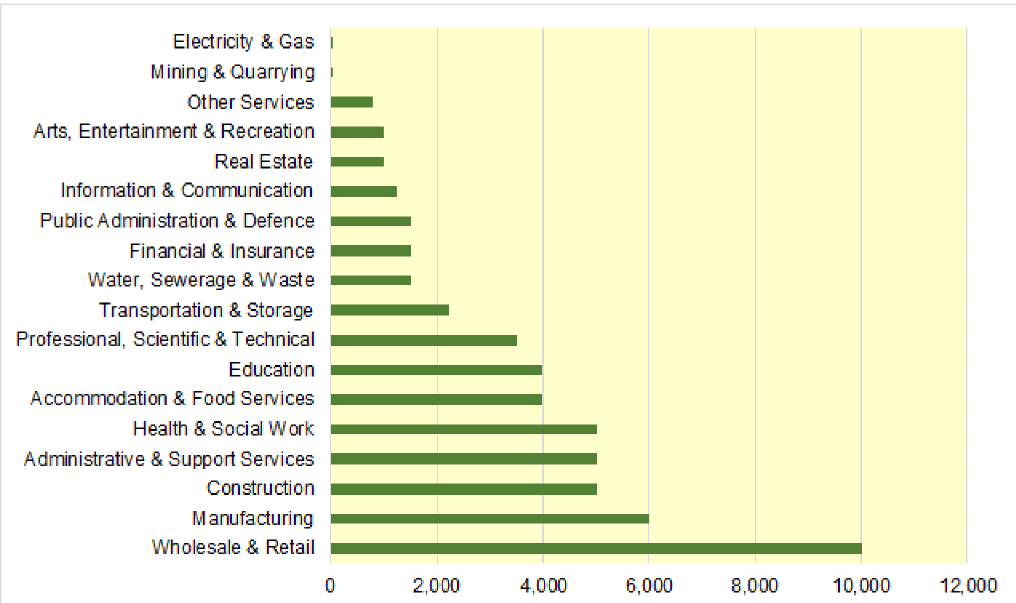
Number of firms Figure 4.10 compares the number of firms in Braintree with the situation in neighbouring districts. Setting Uttlesford aside, the other three districts were all in a similar position in 2010 but have diverged somewhat since. Braintree has seen the slowest growth (12%), reaching 6,595 in 2023. Chelmsford, by contrast has seen a 32% growth in enterprises, up to 8,155.

Business sectors Figure 4.11 shows a breakdown of District jobs by sector. As can be seen, the largest sector by far is Wholesale & Retail, with 10,000 jobs. Manufacturing is the second largest sector (6,000 jobs), reflecting the high density of industrial stock in the District. The office market – as represented by Financial & Insurance and Professional, Scientific & Technical, has a combined workforce of just 5,000 jobs.

In their *Economic Plan Research Project* , SQW suggested that Braintree has a higher concentration of activity in Manufacturing, Construction and Wholesale & Retail relative to the Essex level, but that in all three sectors, the employment growth rate has either been stagnant, (Construction and Wholesale & Retail), or the level of employment has declined (Manufacturing) over the previous five years. [14] By contrast, sectors that grew strongly over the same period (2017-22) included Professional Services (25%), Water Supply and Waste Management (25%) and Health (40%), all of which have experienced growth above the Essex level.

SQW also provide an analysis of more detailed two-digit (SIC) codes, in which Retail is the largest sub-sector in Braintree (5,000 jobs), followed by Education (4,000 jobs), Wholesale Trade (3,000), Food & Beverage (3,000), and Health Activities (3,000). Manufacturing, Utilities and Financial Services sectors are among those which have specific sector specialisms with a high concentration in Braintree relative to the national level.

Figure 4.11 Employee jobs by sector, Braintree



Source: NOMIS

[14] SQW (2022) *Economic Plan – Research Project: Evidence Report to Braintree District Council*

In terms of the highest absolute employment growth achieved by two-digit sub-sectors, Human Health Activities grew by 1,750 jobs, 2017-22. Other strong performing sectors included Water Treatment & Supply (+750 jobs), Building & Landscape Activities (+600), Head Offices & Management Consultancy (+600 jobs) and Residential Care (+250).

Business structure Employment in the District is dominated by small businesses, with 89% of firms being classed as 'micro', 0-9 employees. Small' firms (10-49 employees) account for 9%. There are 105 'medium' firms of 50-249 people and just 15 'large' firms of 250 or more.

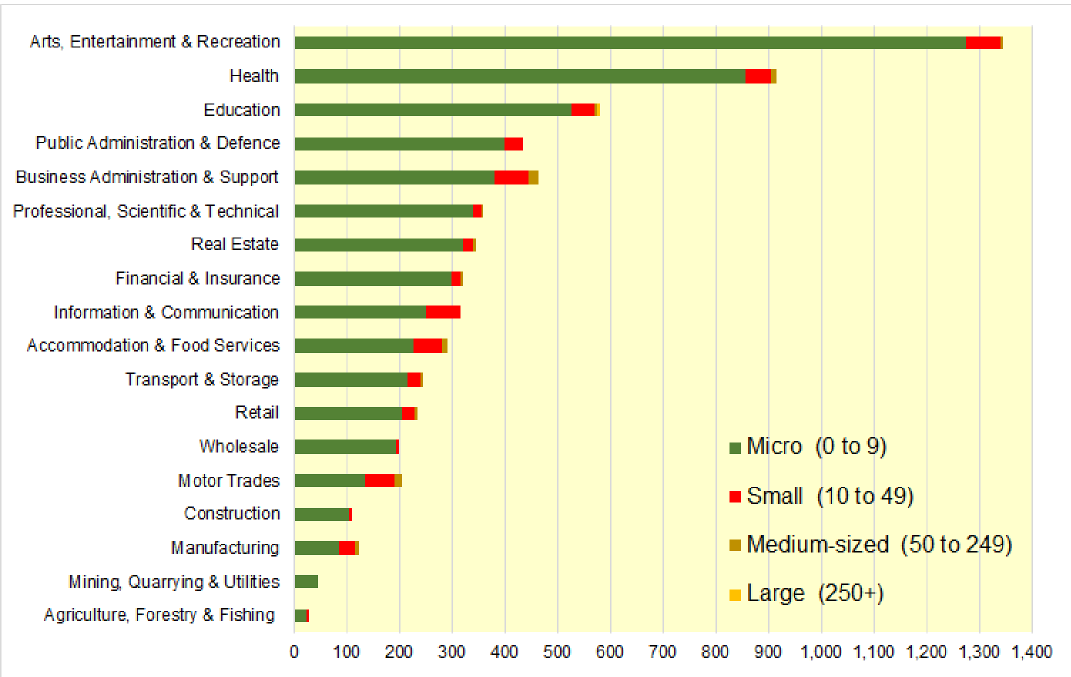
Figure 4.12 Employment by business size

Business size	Braintree (No)	Braintree (%)	East (No)	East (%)
Micro (0 To 9)	5,880	89.2	241,525	89.6
Small (10 To 49)	590	8.9	22,955	8.5
Medium (50 To 249)	105	1.6	4,125	1.5
Large (250+)	15	0.2	970	0.4
Total	6,595	-	269,575	-

Source: NOMIS

These figures are not at all unusual. They are similar to the regional average. However, they merit highlighting here in order to emphasise the fact that most demand for premises, numerically, comes from small businesses. To emphasise the point about firm size, Figure 4.13 shows a breakdown of firm size by sector. We can see that Art, Entertainment & Recreation has 1,345 firms, of which 1,275 are Micro.

Figure 4.13 Firm size by sector, 2023



Source: NOMIS

Sector strengths According to Essex County Council (2023), by 2040 Essex's population is likely to increase by 13%, or 192,000 people, to 1.65m – allowing for significant economic growth. In line with this projected growth, the economic strategy identified five key sectors that have the potential to underpin growth in the wider economy.

Figure 4.14 Essex growth sectors

Current size of the five growth sectors	Twenty year targets for additional growth
Construction: £5.4bn	£4.1bn and 37,000 jobs
Energy: £288m	£18m and 1,000 jobs
Advanced Manufacturing & Engineering: £2bn	£312m
Digitech: £1.2bn	£340m and 2,700 jobs
Life Sciences: £94m	£94m and 3,500 jobs

The strategy also notes that existing sector strengths also exist in logistics, retail, agriculture, professional services and tourism.

Using data from the Inter Department Business Register (IDBR), Figures 4.15 to 4.18 map the distribution of business activities in Braintree. The main points are summarised below.

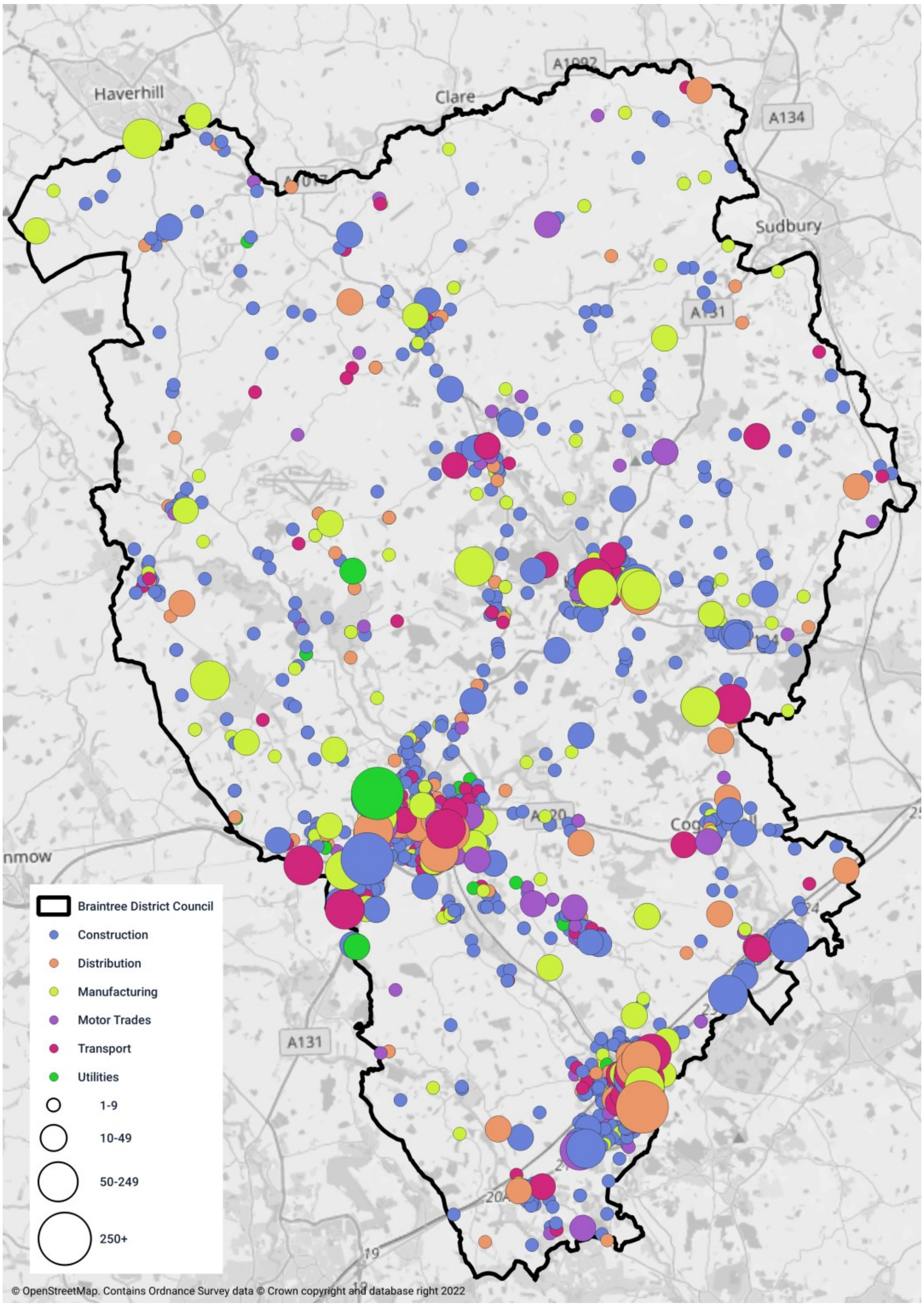
- Construction, Distribution, Manufacturing, Transport & Utilities activities are clearly concentrated around Braintree town, Halsted and Witham, with subsidiary concentrations around Kelvedon and Coggeshall (Figure 4.15). The influence of the road network is also clear to see.

- Financial, Professional, Information & Communications and Admin & Support activities show the overriding importance of Braintree town and Witham (Figure 4.16). It is also clear that there are significant concentrations of jobs across rural areas, indicating the scattered nature of 'white collar' work, particularly of professional services.

- Accommodation & Food, Retail and Arts & Leisure activities, as would be expected, are concentrated in the main towns with, Braintree and Witham very dominant (Figure 4.17). There are notable concentrations of Accommodation in rural areas.

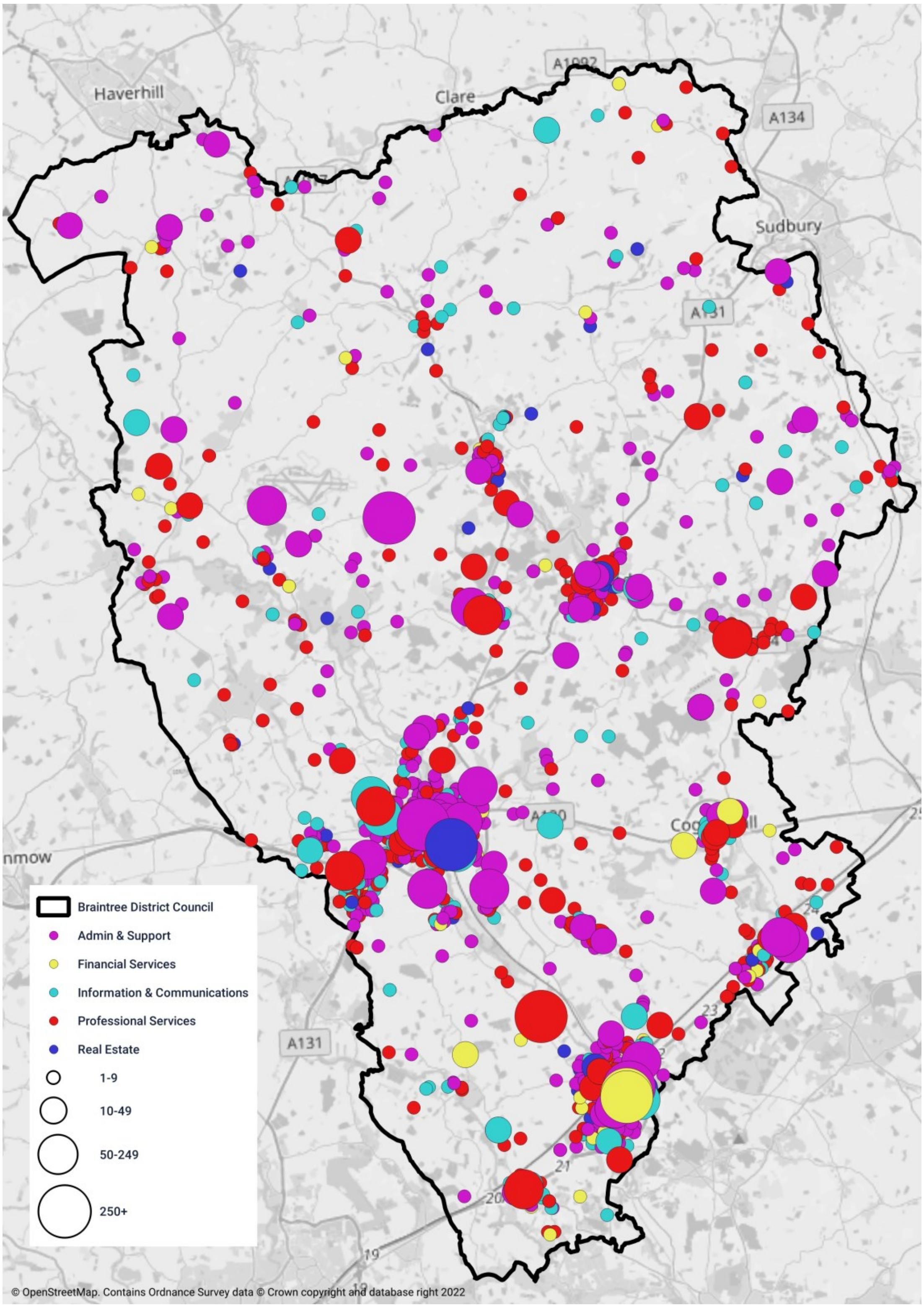
- Again, as might be expected, Education, Health and Public Admin activities are concentrated in the areas of greatest demand (Figure 4.18). There is a strong concentration along the A12, and a further subsidiary concentration around Castle Hedingham and Sible Hedingham, where there is a Council-owned industrial estate with some office space, plus a new office building, Osier House.

Figure 4.15 Distribution of Construction, Distribution, Manufacturing, Transport & Utilities activities



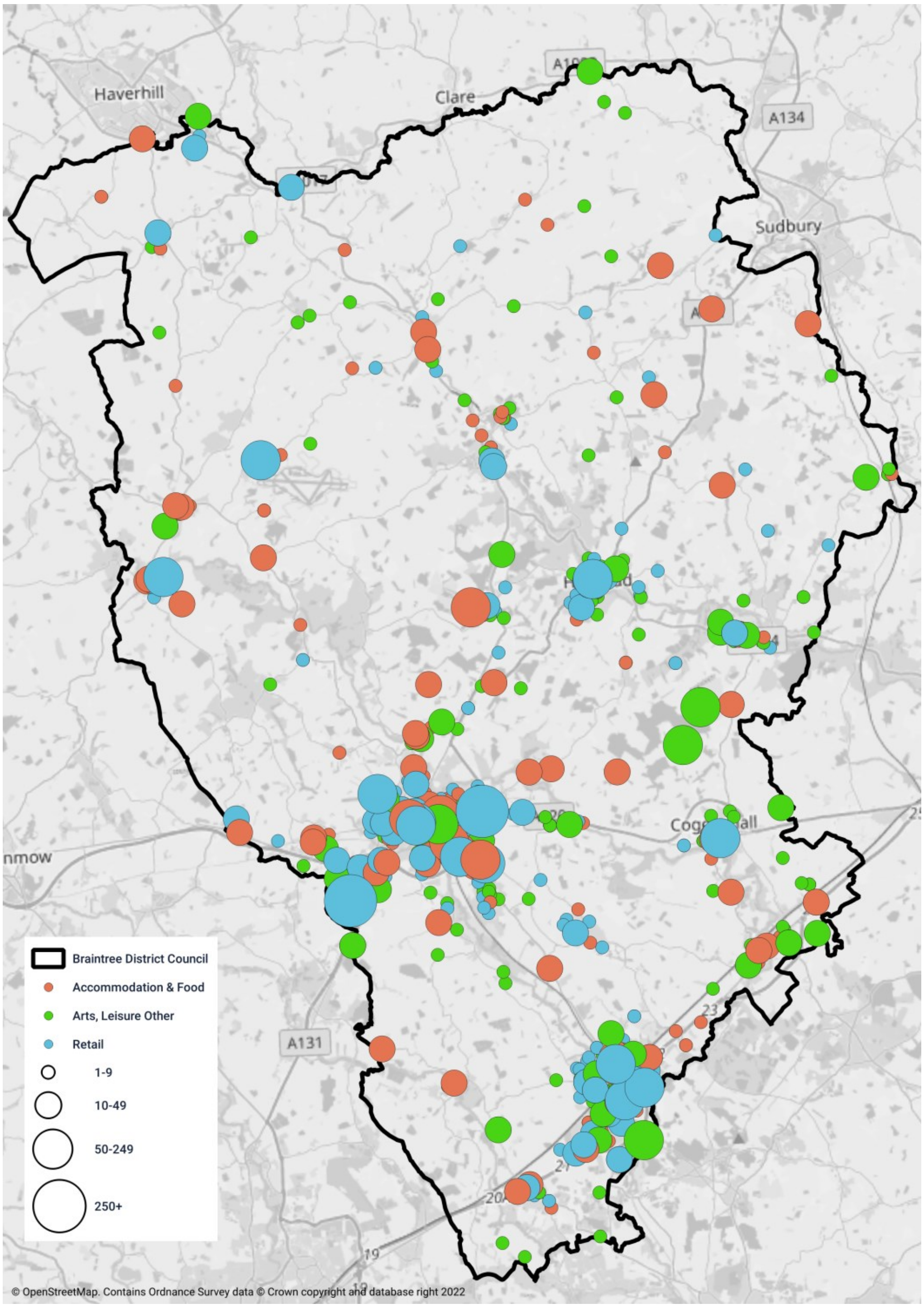
Source: IDBR Survey

Figure 4.16 Distribution of Financial, Professional, Information & Communications and Admin & Support activities



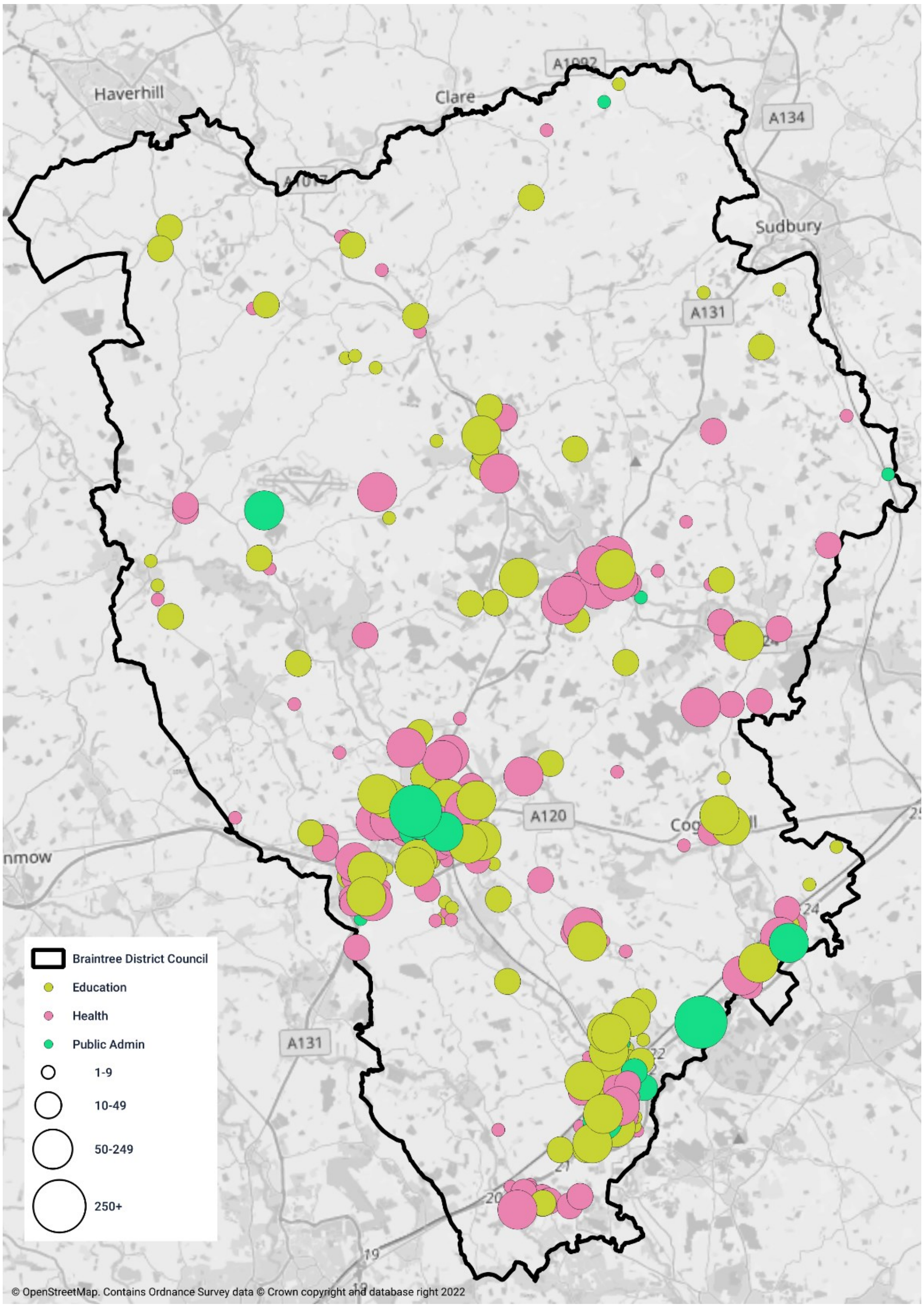
Source: IDBR Survey

Figure 4.17 Distribution of Accommodation & Food, Retail and Arts & Leisure activities



Source: IDBR Survey

Figure 4.18 Distribution of Education, Health and Publica Admin activities



Source: IDBR Survey

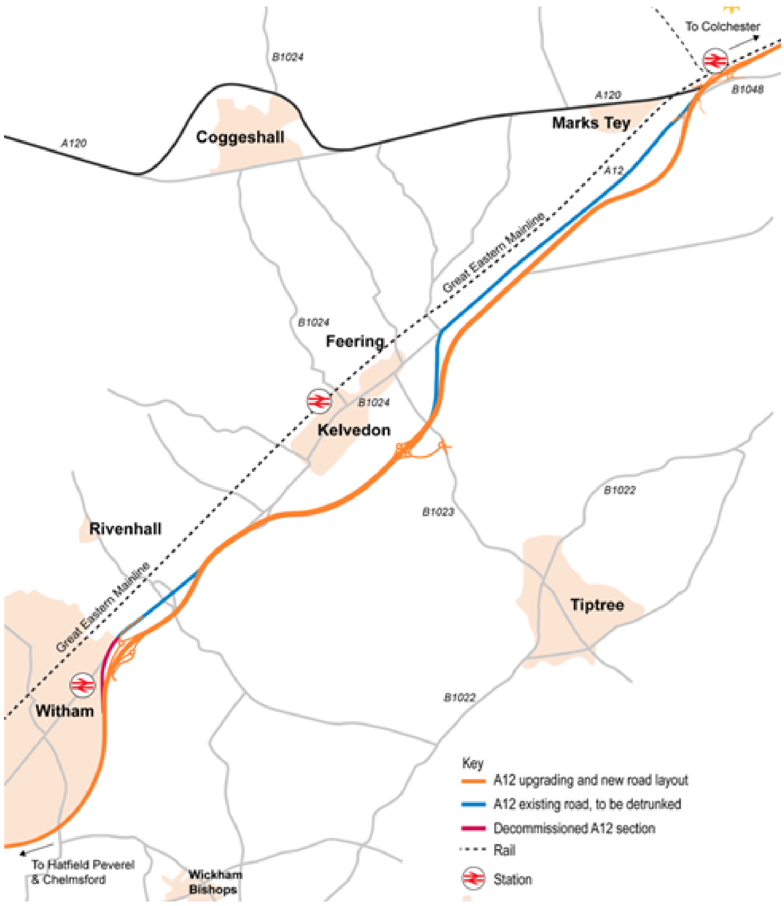
4.4 Potential regional economic drivers

There are a number of strategic investments – recent and in prospect – that might have a knock-on impact for the Braintree economy. In addition to improvements to the A120, the four catalysts to growth include Freeport East, the Cell & Gene Therapy Catapult, I-Construct and expansion at Stansted airport.

Road improvements: A12 Chelmsford to A120 widening scheme This scheme will widen the A12 between Junction 19 (Chelmsford) and Junction 25 (Colchester interchange) between 2024 and 2028 (Figure 4.19). The A12 is one of the busiest roads in the east of England and provides a strategic connection between Chelmsford and Colchester, as well as the ports of Harwich and Felixstowe and nearby Stansted Airport. It provides the main south-west/north-east route through Essex and Suffolk, connecting Ipswich to London and the M25. The Junction 19-25 section carries up to 90,000 vehicles every day. [15]

The proposed changes are expected to reduce congestion by increasing the capacity of the road, making journey times more reliable. The proposed scheme will save motorists as much as 1.5 hours in a working week if they travel daily between junctions 19 and 25. They will also take long-distance traffic off the local roads and put it back onto the A12. The improvements would entail three new junctions.

Figure 4.19 The A12 Chelmsford to A120 widening scheme



[15] https://nationalhighways.co.uk/our-roads/east/a12-chelmsford-to-a120-widening-scheme

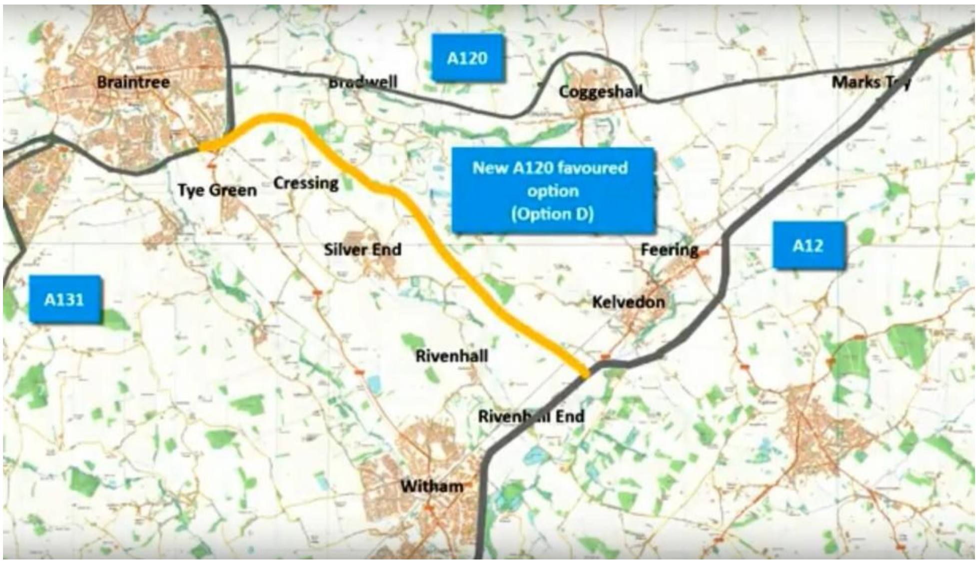
The scheme was granted a Development Consent Order in January 2024. The Court of Appeal has dismissed the legal challenge (August 2024) and the legal process is now over. The scheme was scheduled to be open to traffic in 2027 – 28, but given the legal challenge National Highways are reviewing scheme implementation dates.

Road improvements: A120 Braintree to A12 The A120 is a key route for Braintree and for the regional economy. The road currently suffers excessive and frequent delays. Proposals for improving this stretch of road were initially developed by Essex County Council (ECC), who announced 'Option D' as the preferred route for the new road (Figure 4.20). Since 2020 responsibility for the proposals has transferred to National Highways, which has been validating and updating the ECC's work. [16]

The scheme is one of the Government's Road Investment Strategy 3 (RIS3) 'pipeline projects' that will undergo further analysis for consideration for potential future investment. ECC, and partners, are continuing to lobby for a new and improved committed A120 scheme as early as possible to assist future growth aspirations in north Essex. Following the General Election all committed road schemes, not yet under-construction, will be subject to review. In its Ministerial Statement to Parliament in March 2023, the government announced that work on the future pipeline of schemes that have been earmarked for RIS3 (covering 2025 to 2030) will now be considered for delivery as part of RIS4 (beyond 2030).

Obviously, this announcement pushes back any prospect of road improvement significantly, but remains relevant in the context the new Local Plan period.

Figure 4.20 Braintree A120 to A12 Option D



The Millenium Way Slips scheme (Galleys Corner) seeks to relieve the significant traffic congestion at peak times at Galleys Corner Roundabout in advance of a longer-term and separate improvement scheme for the A120. The improvements will improve journey time reliability for residents commuting to Chelmsford and Colchester. A planning application was approved in August 2020. ECC, Braintree

[16] https://nationalhighways.co.uk/our-roads/east/a120-braintree-to-a12/

District Council and National Highways are currently working to resolve land and funding constraints.

The Chelmsford Northeast Bypass (CNEB) and Beaulieu Railway Station are to be funded by the Housing Infrastructure Fund (£218m) and South East LEP and developer contributions (£34m). The CNEB will provide a new 4.6km route between the Beaulieu Park development and a new roundabout on the A131 at Chatham Green.

The strategic site allocation at Panfield Lane (up to 825 homes), will provide a link road, with a safeguarded link into the Towerlands development, to provide an alternative route to traffic passing north-south through Braintree town, therefore providing a more strategic function.

The strategic site allocation at Land East of Broad Road, Braintree (up to 1,000 homes) is to provide junction capacity improvements at the A131/Broad Road roundabout and the Marks Farm roundabout on the A120, the latter of which will significantly reduce queues and delays on the A131.

Freeport East (Felixstowe and Harwich) At Felixstowe and Harwich, Freeport East is one of eight new Freeports in England that will provide secure customs zones in which business can be carried out within the country's land border, but where different tax and customs rules apply. There are plans to develop a Green Hydrogen Hub and a Green Energy Hub, with more than 13,500 jobs and £500m investment expected over the next ten years.

Freeport East encompasses Britain's biggest container port and busiest railhead, two major ferry terminals, the UK's leading telecommunications R&D facility and is part of the UK's East Coast Green Energy cluster.

The 32ha Freeport East Felixstowe site is strategically located on the UK's East Coast, offering easy access to north west Europe's major ports and a direct connection to the world's major shipping lanes. Freeport East Harwich is a fully consented 122ha project for the development of an innovative green energy hub, to take advantage of its proximity to the offshore and floating wind farms of the North Sea. The existing infrastructure and expertise from the ports make Freeport East Harwich well-equipped to build the UK's reputation as a leader in renewables.

Freeport East has easy access to major European shipping lanes and exceptional links to ports across the globe. With three rail termini, the port also hosts the UK's busiest and largest intermodal rail freight facility – connecting Freeport East Felixstowe with 15 inland termini across the UK. Freeport East will see the development of a 110ha site creating an offshore wind hub designed to support assembly, manufacturing and associated engineering solutions. This will further strengthen the location's offering for green energy technologies and innovation.

Freeport East will drive breakthrough innovations across the UK's technology and telecommunications sectors through collaboration with research institutions and major organisations. These include the University of Cambridge, Three, BT, the University of Essex (ranked number one in the UK for business-academia knowledge transfer partnerships) and various other innovation clusters.

Complementing the sea ports, Gateway 14 inland at Stowmarket is poised to be the largest logistics and business park in East Anglia at c63ha, with up to 220,000 sq m

(2.36m sq ft). The landmark development is strategically located in a prime position along the main corridor to the UK's midlands via the A14, perfectly situated for logistics and manufacturing.

The impact of the Freeport on demand for industrial and logistics land and property in Braintree district is unclear. On the one hand, the scale of the proposals might be expected to soak up a level of demand to the detriment of the Braintree economy. If the freeport's financial advantages act as a deciding factor to businesses then it might depress demand in Braintree for many years. On the other hand, Braintree does not currently support any great port-related activities or other activities that might be seen to benefit from the incentives. In this case then the impact of the freeport might be minimal. Either way, the Council should monitor what happens at the freeport to gain an early insight into the nature of demand there.

Cell and Gene Therapy Manufacturing Innovation Centre Opened in 2021 on Warner Drive at Springwood Industrial Estate, the Cell and Gene Therapy Manufacturing Innovation Centre (the 'MIC') is a £100m investment commitment by the Government to develop an innovation centre for cell and gene therapies. The MIC provides a state-of-the-art facility, developing expertise and driving innovation into technology transfer for new therapies and vaccines. Large-scale gene therapy manufacturing systems are also be developed at the facility. An additional £4.7m investment has been made for new training facilities and an online learning platform to boost vaccine and cell and gene therapy skills.

The new state-of-the-art centre will scale up COVID-19 vaccine and gene therapy, and will have the capacity to produce millions of doses each month, ensuring the UK has the capabilities to manufacture vaccines and advanced medicines, including for emerging diseases, far into the future. The new centre will complement the Vaccines Manufacturing and Innovation Centre (VMIC) in Oxfordshire.

The Braintree MIC is a 4,627 sq m (49,800 sq ft) building that comprises a new cleanroom module, quality control laboratories, warehouses, development laboratories and a team of 100 skilled staff, who hold the specialist knowledge needed to support collaborators to manufacture their own products. In March 2024 the MIC received a Medicines and Healthcare products Regulatory Agency (MHRA) Manufacturers and Importers Authorisation for Investigational Medicinal Products (MIA(IMP)) and associated Good Manufacturing Practice (GMP) certificate.

The question, of course, is whether the MIC will attract new companies to Braintree.

The I-Construct Business Innovation Hub Opened in early-2022, the I-Construct Innovation Hub is a £2.3m centre of excellence for construction innovation based. The hub's facilities in Springwood Drive are designed to be used to support individuals to start up a business in construction and construction-related sectors, nurture early-stage SMEs and facilitate the commercialisation of new ideas, technologies and research into construction markets. The facility was funded through a £1.5m investment by Braintree District Council and a £1m investment via the EU's European Regional Development Fund.

The two-storey building includes a technology suite, exhibition space, conference facilities and informal meeting areas. The on-site team offers one-to-one mentoring and advice to small- and medium-sized firms connected to the construction industry. The state-of-the-art building was built to very exacting environmental standards using innovative construction techniques and modern materials. [17]

Stansted Airport expansion Stansted owner Manchester Airport Group has secured planning consent to enable combined airfield operations of 274,000 aircraft movements (of which not more than 16,000 movements would be Cargo Air Transport Movements) and a throughput of 43m terminal passengers, in a 12-month calendar period. The investment will create a new arrivals terminal, check-in area and various upgrades including the development of a business park on site.

The terminal extension will add c17,000 sq m (180,000 sq ft) of capacity, in the form of a more spacious departure lounge with a wide variety of shops, bars and restaurants, an expanded immigration hall and additional baggage reclaim belts. The scheme will also see the security hall extended and the latest check-in technology introduced. MAG claims the investment will unlock the potential to deliver an additional 5,000 jobs and a doubling of its GVA, to £2bn per year. [18]

In addition to the Terminal proposals, there is a further planning application for the development of c200,000 sq m (2m sq ft) of commercial space adjacent to the airport, which will be dominated by logistics and distribution uses. There is no clear timing on the completion of the proposals.

[17] https://www.braintree.gov.uk/news/article/395/i-construct-a-centre-of-excellence-for-construction-innovation-was-officially-opened-in-braintree
[18] https://mediacentre.stanstedairport.com/plans-announced-to-extend-terminal-building/

Freeport East, the MIC, the I-Construct and the expansion of Stansted have, in combination, the potential to bring about a significant growth in jobs – in both established and new sectors. The Freeport is likely to increase demand for distribution facilities in the region and particularly along the A12 and A120 corridor (emphasising the need for the delayed road improvements). The MIC has the potential to underpin a nascent life science cluster in the area. I-Construct will provide a sustainable approach to nurturing one of the District's most important sectors (in terms of number of jobs). The expansion of Stansted is expected to create thousands of new jobs, and Braintree is likely to be a beneficiary of such growth.

Summary

This socio-economic profile of Braintree district has confirmed the FEMA to include Chelmsford, Colchester and Uttlesford. Braintree's economy is smaller than either Chelmsford or Colchester, but significantly greater than Uttlesford. Almost two-thirds of Braintree's workers live within the District. Jobs by sector reflect the industrial character of the District's economy, and its relatively limited role as a white collar economy. Sector strengths include construction, energy, advanced manufacturing, digitech and life sciences.

There are a number of strategic investments – recent and in prospect – that will make a positive contribution to the Braintree economy. In addition to improvements to infrastructure including the consented A12 widening, potential A120 Braintree to A12 route, local junction improvements and the permitted expansion of Stansted Airport, at least three of the catalysts to growth, including Freeport East, the MIC and I-Construct, will have a positive impact. As noted the impact of the Freeport is less clear.

5.0 Commercial property market dynamics

The commercial property market in Braintree is shaped by two significant constraints. First, it is located between significantly larger centres, notably Chelmsford and Colchester, but also Uttlesford (with London Stansted). Secondly, its major road, the A12, runs more or less along its southern boundary and is in need of an upgrade (see reference in Section 4.4 regarding review of Government funding), as are the other major roads, the A120, between Galleys Corner and Marks Tey, and A131, which is expected to be improved with the arrival of the Chelmsford North East Bypass, while a bypass for Halstead is still under review along with other potential improvements north of Braintree. The vast bulk of the commercial property market is south of the A131.

One of the results of these two constraints is that, compared to adjacent authorities, the commercial property market in Braintree District is small, with main settlements lacking critical mass to support a significant office market. However, despite the somewhat underspecified road network, Braintree has been successful in attracting and retaining a healthy industrial and distribution market. Figure 5.1 illustrates this, with Braintree district accounting for 34.7% of industrial lettings since 2016 among its Essex neighbours, but only 11.3% of office lettings.

Figure 5.1 Commercial property lettings, volume and share, 2016-2024, Q2

Use		Braintree	Chelmsford	Colchester	Uttlesford
Industrial	Sq ft	3,275,730	1,469,794	1,999,373	456,301
	% share	34.7	15.6	21.2	4.8
Office	Sq ft	266,352	737,310	762,670	326,419
	% share	11.3	31.4	32.5	13.9

Source: EGi

5.1 Change in stock of floorspace

Industrial stock change

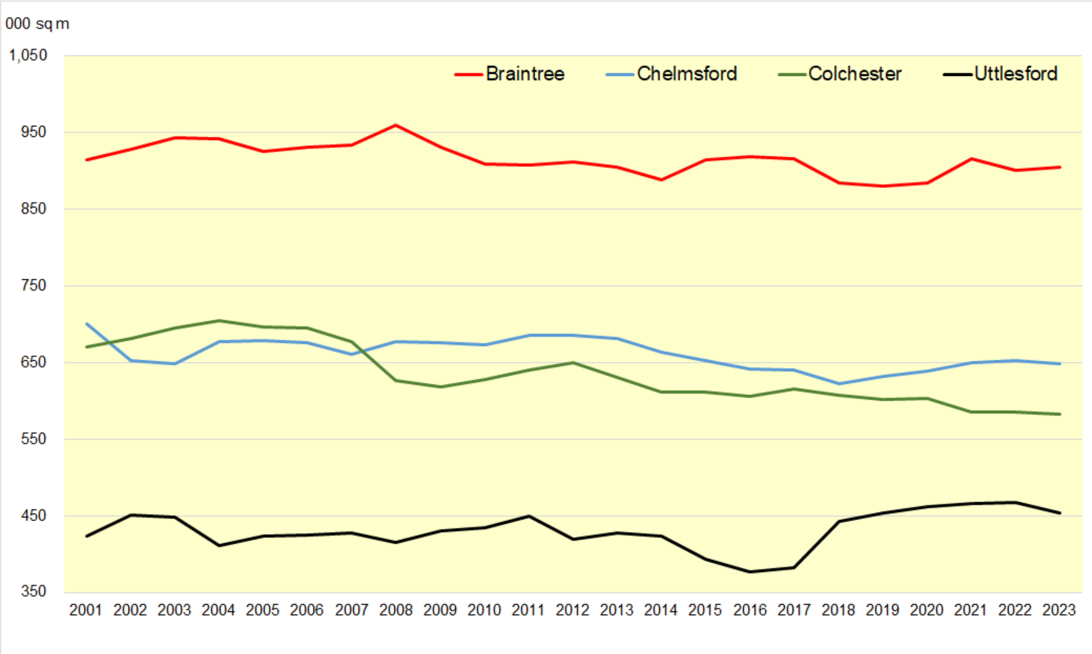
Figure 5.2 shows two decades of change in industrial floorspace stock between 2001 and 2023, comparing Braintree with Chelmsford, Colchester and Uttlesford. The most striking feature is the sheer scale of industrial stock in Braintree. Section 4.0 demonstrated that, on most measures, Braintree has a much smaller economy than both Chelmsford and Colchester. And yet its stock of industrial floorspace is much greater. This demonstrates how important this element of employment land is to the local economy. Uttlesford is seen to be a relatively small industrial market, despite the presence of Stansted airport there.

Over the whole period, Braintree’s industrial stock has shrunk slightly, but has fluctuated throughout. Similarly both Chelmsford and Colchester have experienced significant shrinkage in their stock. Again these dynamics demonstrate the importance of industrial premises to the local economy.

Office stock change

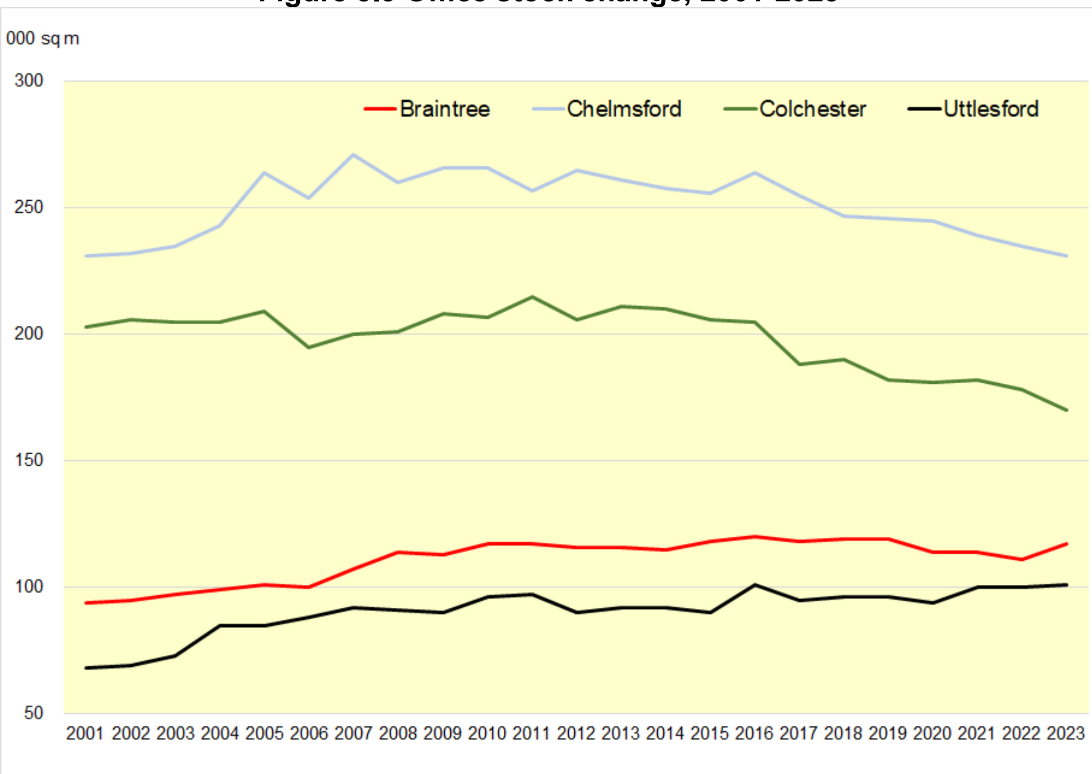
Figure 5.3 presents data on office stock change between 2001 and 2023. It is immediately apparent – in comparison to the industrial data presented above – how much smaller the office market is in Braintree compared to Chelmsford and Colchester. The comparison between the industrial and office trends demonstrates the economic characters of the respective markets. Uttlesford has performed well, measured by its own small scale.

Figure 5.2 Industrial stock change, 2001-2023



Source: VOA

Figure 5.3 Office stock change, 2001-2023



Source: VOA

The other important feature of the data is that, of the four markets, Braintree and Uttlesford record an increase in office stock over the period, growing from 94,000 sq m to 117,000 sq m. By contrast Chelmsford maintained a status quo, while Colchester office stock shrank by 33,000 sq m (16%). In this sense, the Braintree office market has performed well.

Summary An interesting feature emerges when trends in square metres of stock are compared to trends in the number of stock units (Figure 5.4). This shows, overall, that while stock is shrinking, the number of units is increasing. Braintree, for example, has experienced a 25% rise in the number of industrial units and a 79% rise in the number of office units. The obvious conclusion to draw from this is that the data reflect wider economic data which show a comparatively rapid growth in the SME sector.

Figure 5.4 Number of rateable properties, 2002-2023, office and industrial

Market	Industrial stock			Office stock		
	No. rateable properties		% change	No. rateable properties		% change
	2001	2023		2001	2023	
Braintree	1,540	1,920	25	490	880	79
Chelmsford	1,160	1,570	35	660	1,280	93
Colchester	1,330	1,350	1.5	870	1,300	49
Uttlesford	910	1,120	23	590	920	56

Source: VOA

The data on floorspace stock change are quite revealing. They underline the industrial character of Braintree's economy – a feature that is immediately apparent from a visual survey of the district – with large concentrations of stock on industrial estates in Braintree town such Springwood Drive and Lakes Road; in adjacent Great Notley at Skyline 120 and Horizon 120; and Witham at Eastways and Freebournes Road. They also show that while comparatively small, Braintree's office stock is holding its own. This suggests a consistent level of demand (given that there seems to be relatively little vacancy) in contrast to comparator towns which, following a national trend, have experience significant shrinkage.

5.2 Property market

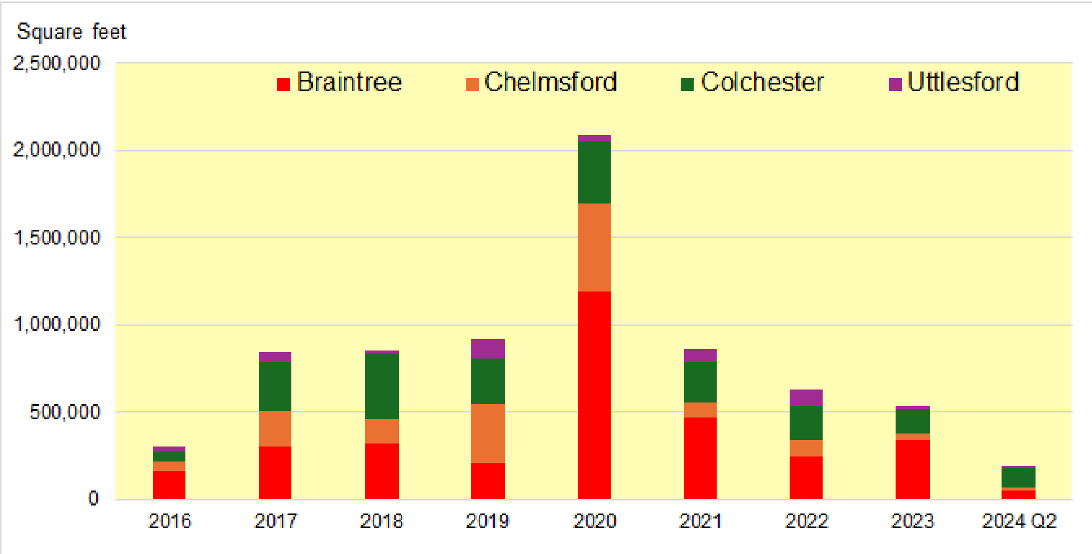
The following sub-sections present data on market dynamics including lettings, availability and investment transactions. Our major source of data is the online EGi database. We recognise that no single property database captures all of the market transactions or availability in a given area. Even a combination of leading property databases (e.g. CoStar, Egi) would tend to miss a lot of transactions and availability at the smaller end of the market.

Industrial

It is noticeable that although some stock in the district is quite old, it is generally well occupied, with very few signs of distress or neglect. Figure 5.5 shows annual industrial and distribution lettings from 2016, to the second quarter of 2024. Before 2020 Braintree district is conspicuously lacking in activity, but 2020 saw an apparent surge in Braintree district. However, this was inflated by a single large letting of c60,000 sq m (605,000 sq ft) at 1 Freebournes Road, Witham. Even so, Braintree district still accounted for 34.7% of all lettings between 2016 and 2024 in the four districts. Activity since then has been buoyed by the development of Skyline 120 and Horizon 120.

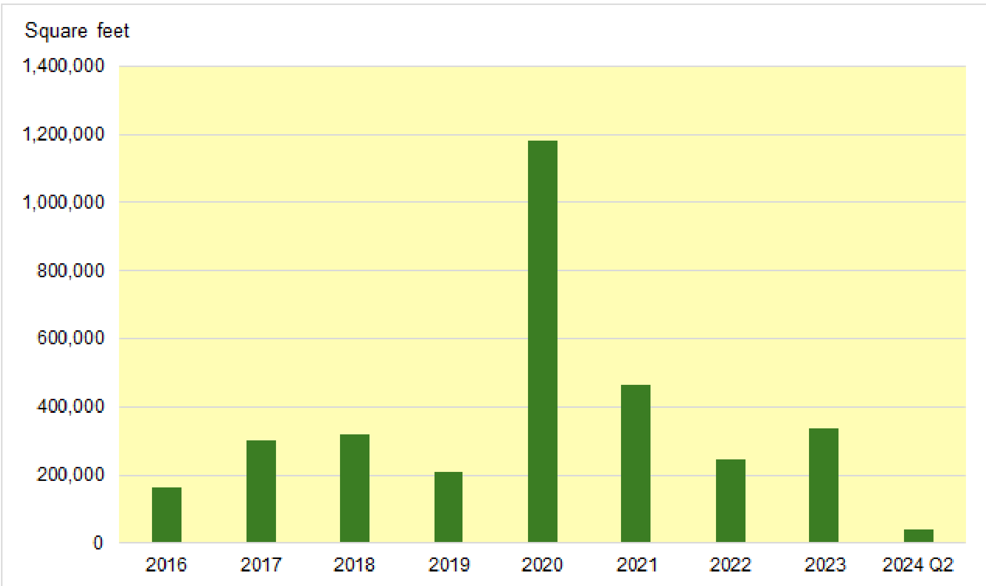
Lettings in Braintree district follow the same broad pattern as for the wider area, with slightly better performance in 2023, boosted by Horizon 120. When a single very large letting at 1 Freebournes is excluded a fairly consistent pattern is seen, with a slight boost in 2020, most likely driven by smaller "last mile" units to provide deliveries during the pandemic.

Figure 5.5 Industrial lettings, 2016-2024 Q2 - Essex districts



Source: EGi

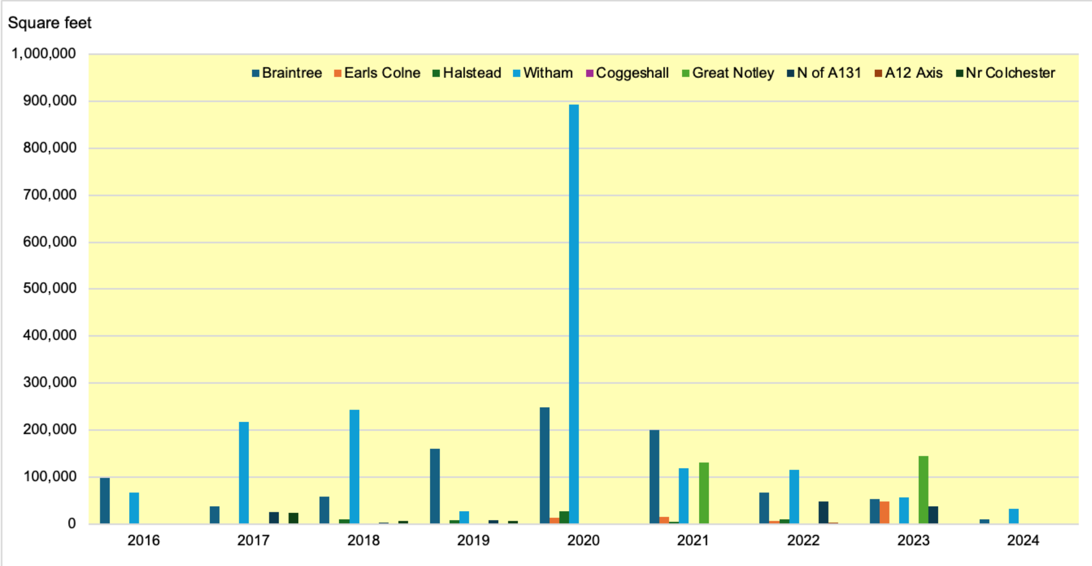
Figure 5.6 Industrial lettings, 2016-2024 Q2 - Braintree district



Source: EGi

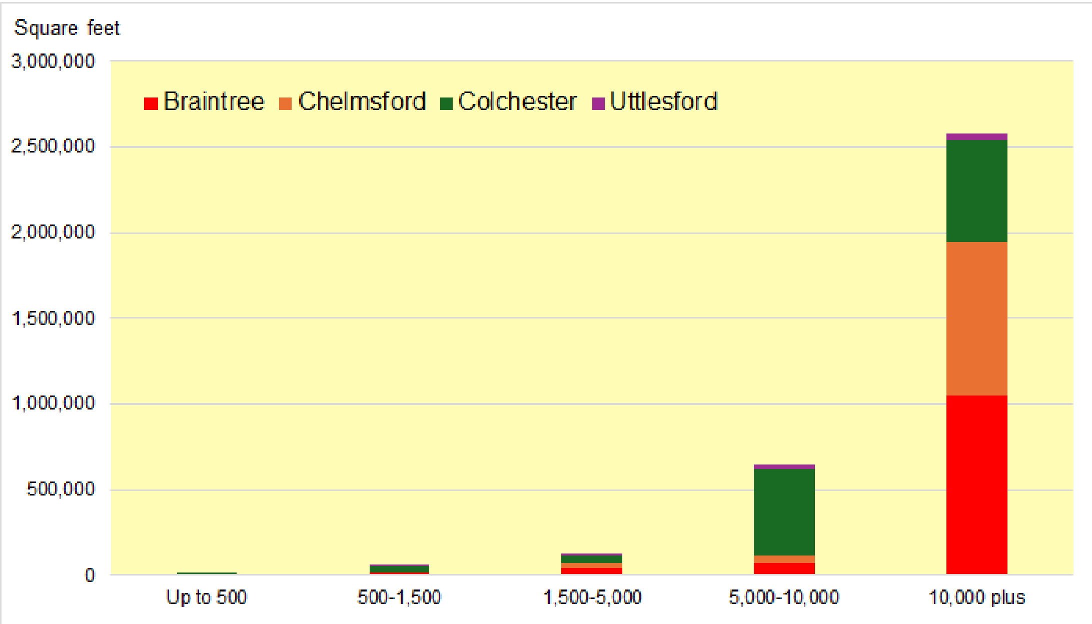
When the data are broken down by the settlements within Braintree district [19] it is clear that Witham and Braintree town are the major centres of activity (Figure 5.7).

Figure 5.7 Industrial lettings, 2016-2024 Q2 - Braintree settlements



Source: EGI, Ramidus Consulting

Figure 5.8 Industrial availability, 2024 Q2 - Essex districts



Source: EGi

[19] The settlements used are Braintree, Great Notley, Earls Colne, Coggeshall, Halstead and Witham, all of which have significant employment land designations or some degree of critical mass. Three other localities used are A12 axis (excluding Witham), North of A131 covering the large rural area, including Haverhill, and Near Colchester for an area south of the A131 where individual employments sites that are too small to designate.

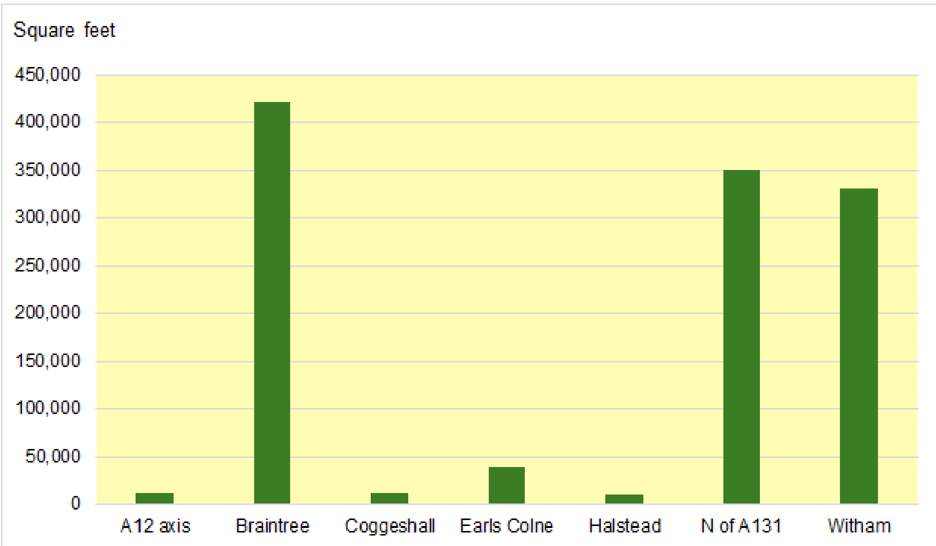
Agents report that Witham commands the highest rents, as might be expected given its proximity to the A12, with 'tone of the market' rents just over £13 per sq ft, while Braintree itself is only slightly lower at around £12 per sq ft. Halstead is significantly cheaper, at around £9.50 per sq ft, although at least one recent deal has achieved significantly more than that. One agent also noted that small modern units, even in off-pitch locations, can command rental premiums above the tone of the market, with one deal reported at more than £16 per sq ft.

For the district as a whole, the average size of letting was 1,250 sq m (13,536 sq ft), between 2016 and 2024, although this falls to c1,000 sq m (11,119 sq ft) if the exceptional deal at 1 Freebournes is excluded.

In terms of availability (Figure 5.8), it is abundantly clear that very few purpose-built small units are being marketed, suggesting that existing stock is fully let. This is consistent with feedback from property agents, who say that the major shortage is of units below 5,000 sq ft. While larger units can often be sub-divided it is noteworthy that the pattern is consistent throughout the sub-region.

In terms of availability in Braintree settlements, Braintree and Witham are again dominant (Figure 5.9), accounting for 52 of the 64 units available, with availability north of the A131 massively inflated by a single unit of c25,000 sq m (265,000 sq ft) in Haverhill. Care is needed in interpreting this pattern, given that none of the availability levels are high in industrial markets generally. One agent described Witham as "*basically out of land*," which suggests that supply levels shaped by normal market churn and development largely in the form of intensification and upgrading rather than significant adding to stock. One agent described Witham as a "*value proposition*" versus Chelmsford. In Braintree demand levels are driven largely by B8 space, and there is some frustration at the lack of stock even with the success of Horizon 120.

Figure 5.9 Industrial availability, 2024 Q2 – Braintree settlements



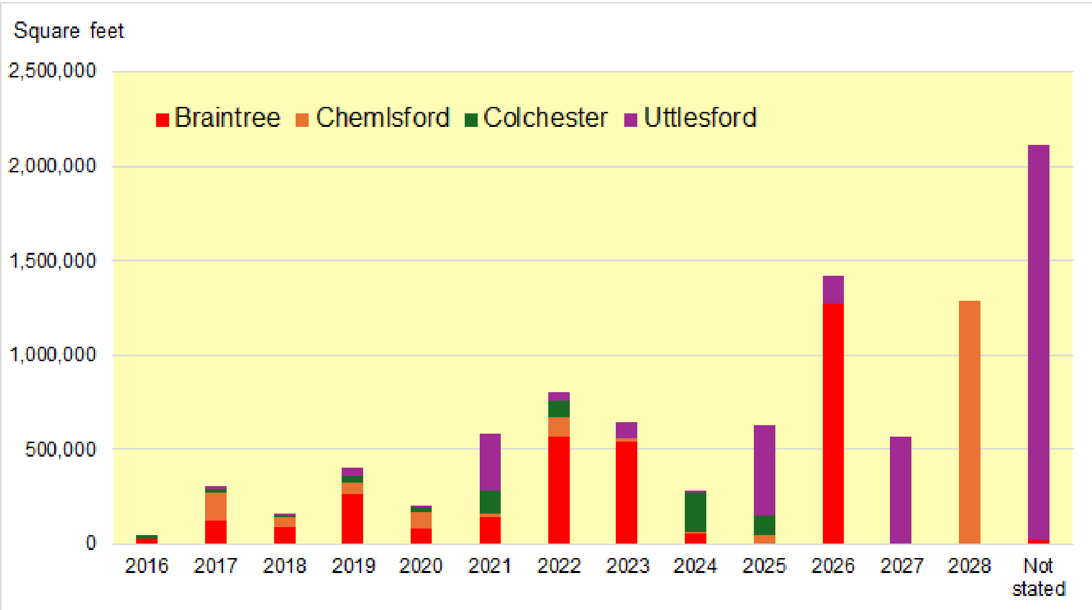
Source: EGi

Agents observed that some of the town centre industrial space, especially around East Street, is poor quality and as one put it "*prime to be shifted into residential*" Given occupiers are more typically associated with edge of town sites, it was suggested that replacement stock would be needed to enable this. Halstead was described by one agent as a "*tough sell*": because of its restricted access, and a poor choice for large scale logistics. That said, around 35,000 sq ft of new space at Broton Road is expected to be built out soon.

Otherwise, while other settlements make contributions, it is clear that the strategic road network shapes where the jobs are, and therefore where the available space is generally located.

The development pipeline for industrial and distribution space shows a robust presence for Braintree district, thanks largely to the Skyline 120 and Horizon 120 developments, with the second phase of Horizon 120 scheduled to arrive two years ahead of a similar quantum of space in Chelmsford (Figure 5.10). Although much could change, this suggests that the market is behaving rationally. Significant also is the 200,000 sq m (2m sq ft) Stansted Airport development, with outline consent. While its delivery date is unknown it is likely to be after Horizon 120 Phase 2.

Figure 5.10 Industrial pipeline, 2016-2028 - Essex districts

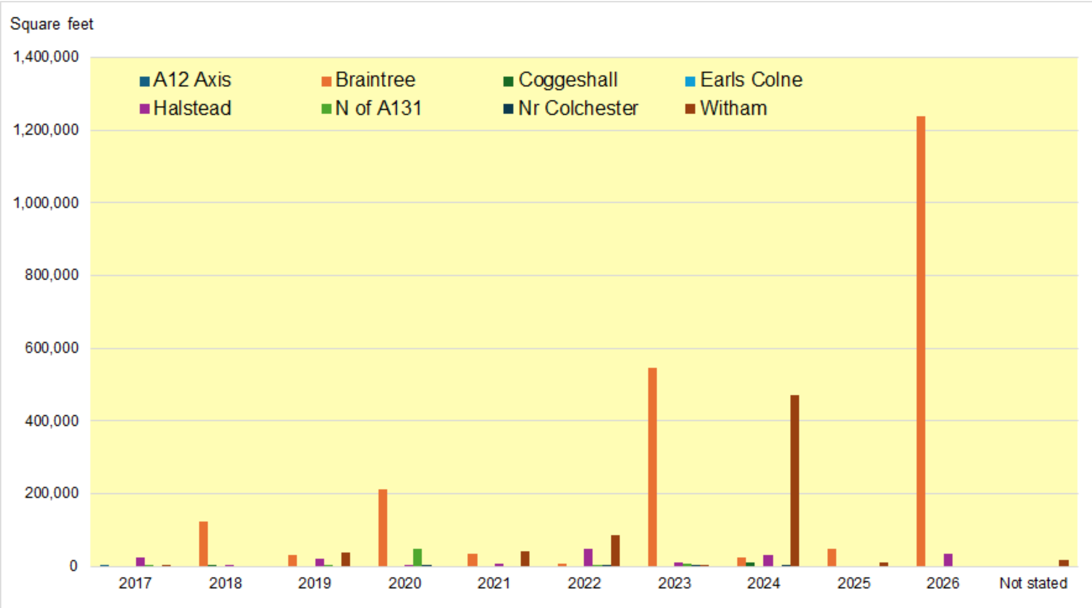


Source: EGi

It is worth noting that the Stansted development will provide a substantial capacity increase for the airport, which is already the third biggest airport for freight after Heathrow and East Midlands Airport. It would not be surprising to see some form of "halo effect" benefiting nearby districts. One agent voiced scepticism that this space will be delivered on a realistic timescale.

It is unsurprising that Braintree and Witham dominate the pipeline within the district (Figure 5.11), with the bulk being in Braintree, in the case of Horizon 120 delivering a net addition to stock, while smaller peak in Witham mainly of upgrading – either by refurbishment or redevelopment – of existing stock, with more modest changes to the total stock.

Figure 5.11 Industrial pipeline, 2016-2026 – Braintree settlements



Source: EGi, Ramidus Consulting

By national standards the industrial and distribution property markets in Braintree and adjacent towns are small, with relatively few of the mega-sheds that can be found along the A14 or in places such as Milton Keynes or for that matter, the A13 location such as London Gateway Logistics Park. Braintree is thus typical of the area, but significantly more constrained in terms of viable locations for such space. That is not to say that it is unsuccessful, with agents suggesting it has been attractive to "*north London push-outs*" who find that areas such as East Hertfordshire are overly focussed on R&D and Hi Tech space, and that Braintree is more flexible and better value. Redeveloped space at Bradbury Park on Springwood Drive has let readily, indicating that upgrading space is a viable option.

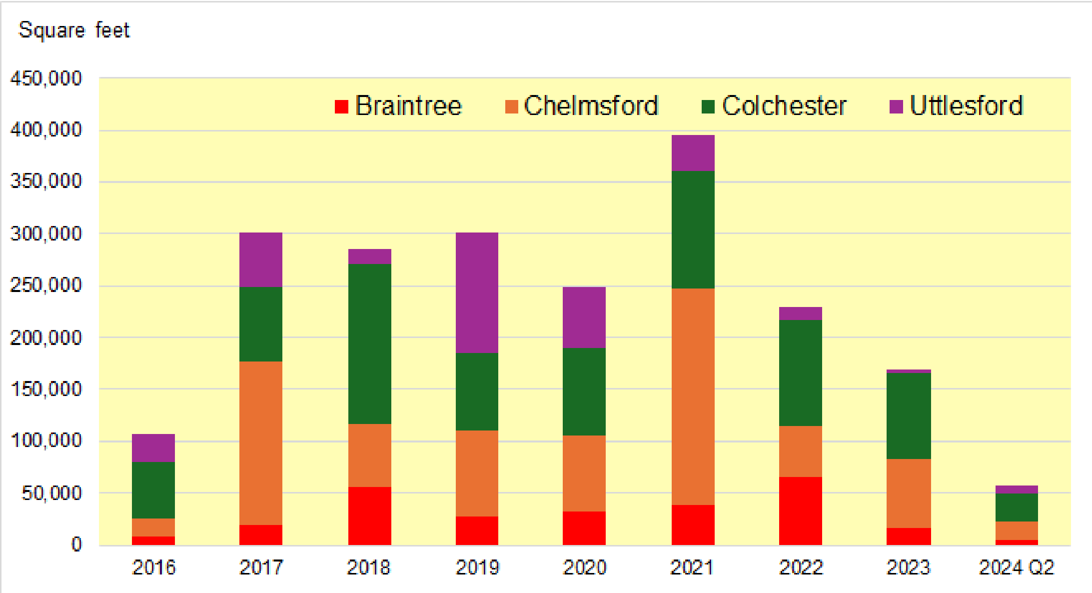
Offices

On any measure the office market in Braintree district is small, something clearly evident when compared with adjacent districts, with both Chelmsford and Colchester having much larger letting markets (Figure 5.12), with Braintree accounting for just 11.3% of lettings compared to Chelmsford's 31.4% and Colchester's 32.5%. This is despite the fact that average letting sizes between Braintree, Chelmsford and Colchester were roughly the same at between 185 sq m (2,000 sq ft) and 260 sq m (2,800 sq ft), but with many more transactions in Chelmsford (258) and Colchester (351) than Braintree (93). Uttlesford accounts for 13.9% of space let in 92 deals, putting it on a par with Braintree.

Indeed, during site visits only three substantial office buildings were identified, two in Witham and one at Horizon 120. One agent suggested that the major reason for the two large occupiers in Witham remaining is that other towns lacked large office units, even in Chelmsford.

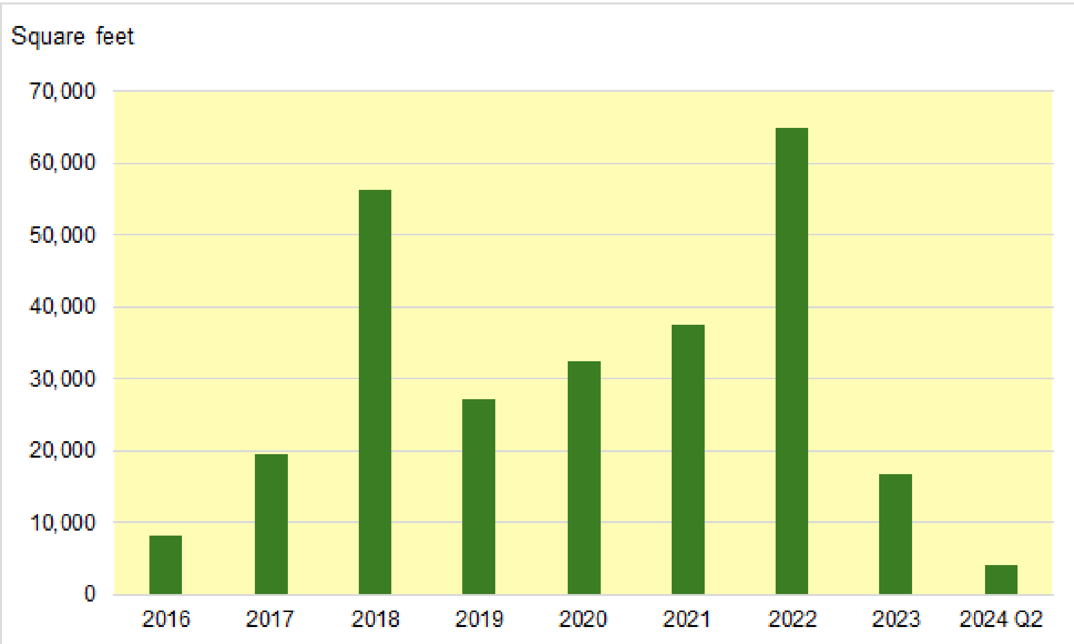
The result of this is an erratic pattern of lettings in Braintree district (Figure 5.13) and it is even difficult to characterise the 2019 and 2020 levels as a pandemic slump, given the level seen in 2016 and 2023. The pattern is shaped by individual large – by Braintree district standards – deals, rather than overall demand.

Figure 5.12 Office lettings, 2016-2024 Q2 - Essex districts



Source: EGi

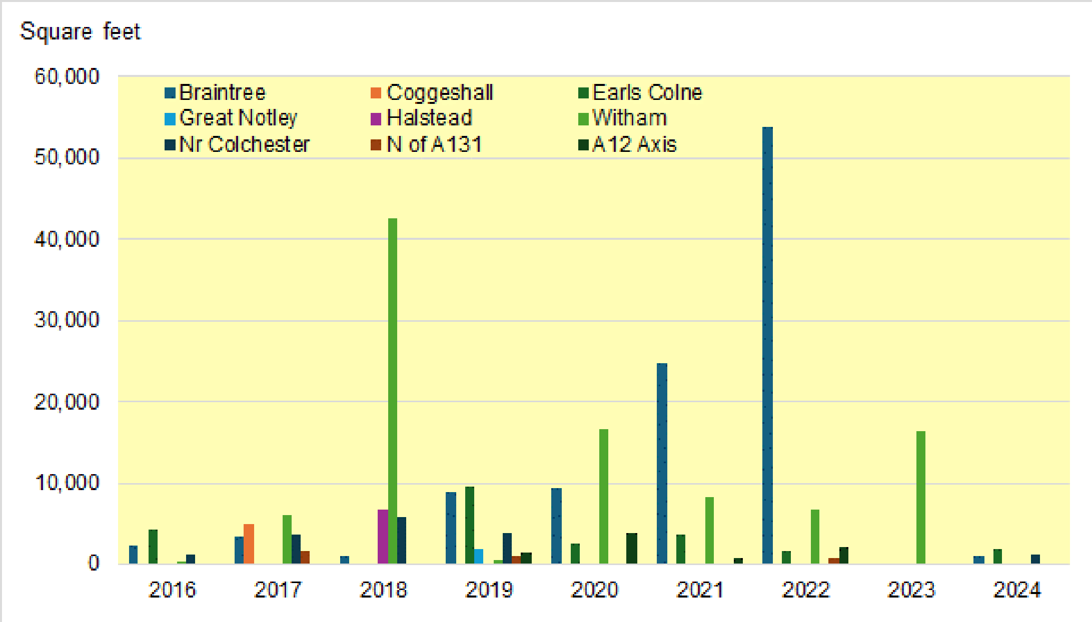
Figure 5.13 Office lettings, 2016-2024 Q2 - Braintree district



Source: EGi

The distribution of lettings around Braintree district illustrates that Witham and Braintree are the major centres, although Earls Colne is also notable, mainly due to offices at Earls Colne Business Park at Earls Colne airfield (Figure 5.14). However, it is hard to escape that Braintree is not a significant office market.

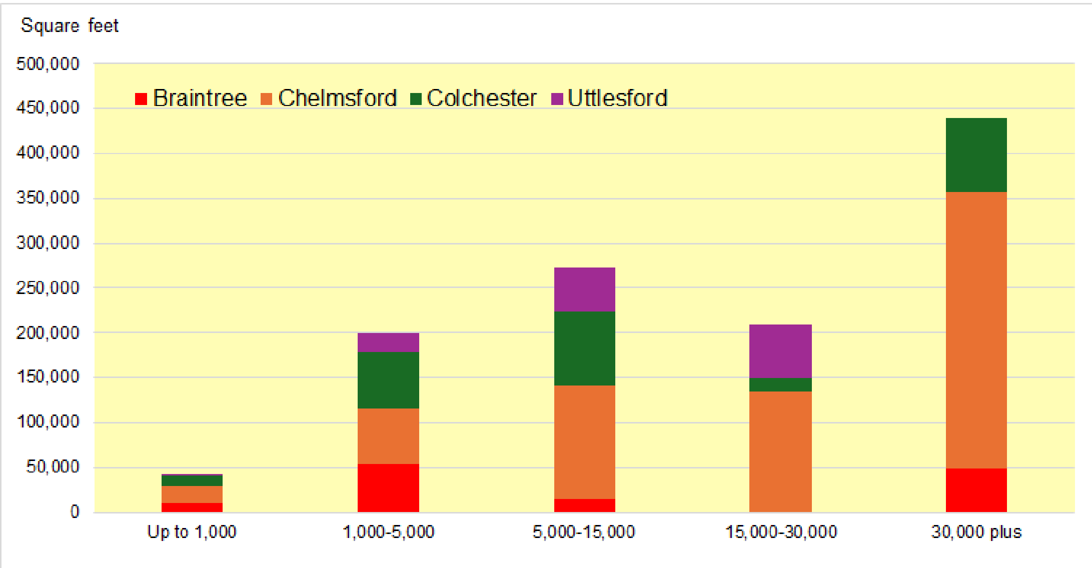
Figure 5.14 Office lettings, 2016-2024 Q2 - Braintree settlements



Source: EGi

In terms of availability (Figure 5.15) the pattern is much the same, with Braintree accounting for just 10.4% of available space at Quarter 2 2024 and more than half of available space being in Chelmsford (53.7%).

Figure 5.15 Office availability, 2024 Q2 – Essex districts

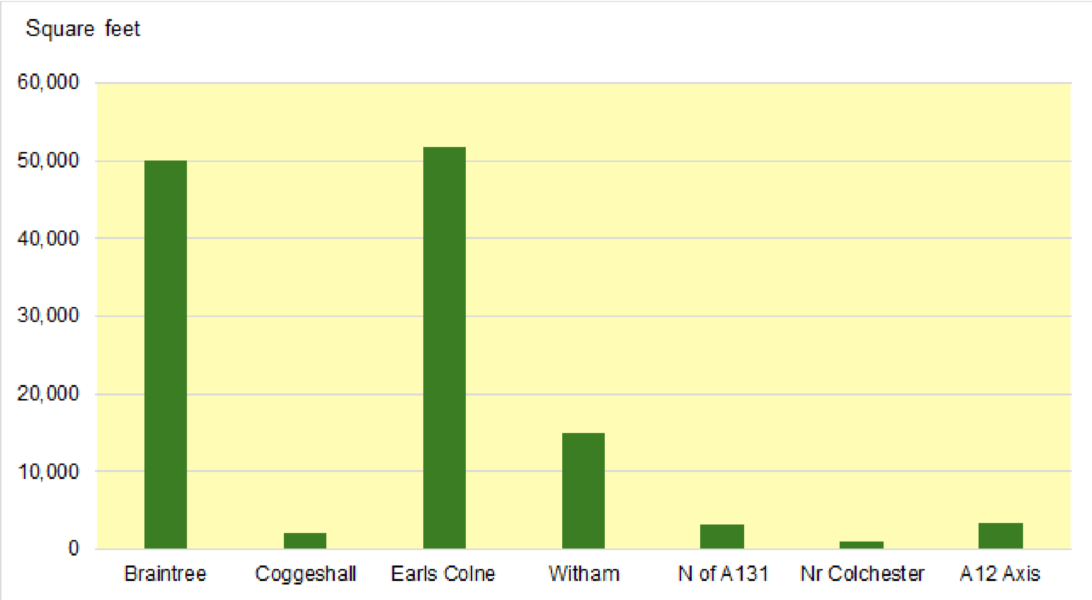


Source: EGi

Looking at availability by Braintree settlements shows Braintree and Earls Colne dominant, but each with just 50,000 sq ft available (Figure 5.16), while the other settlements have a very low level of availability. All agents agreed that there is nowhere near enough demand to warrant new office development.

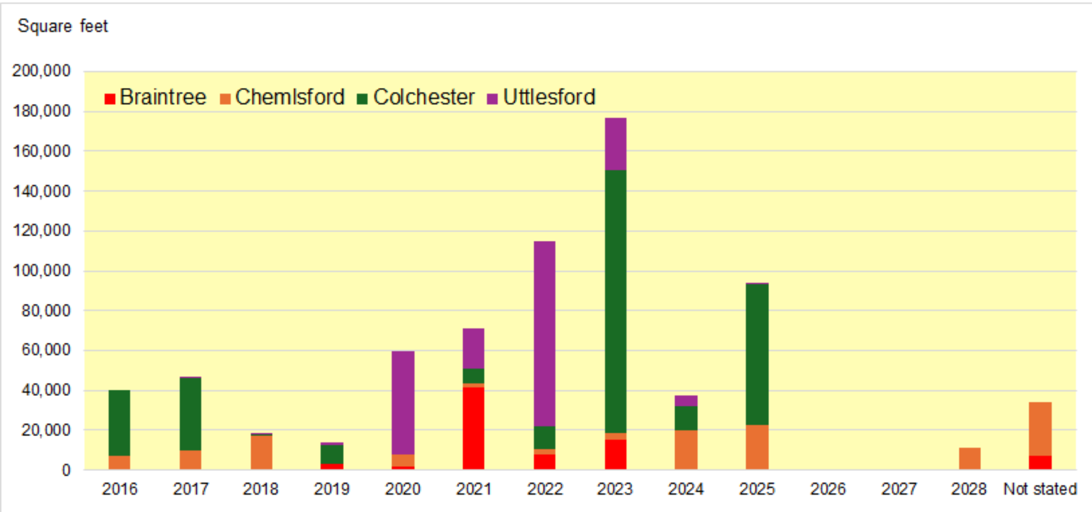
In terms of pipeline, Braintree District barely figures, accounting for just 7.2% of all space built and proposed since 2016 (Figure 5.17). Broadly, however, the office pipeline is very modest in this part of Essex, reflecting low office rents in the area.

Figure 5.16 Office availability, 2024 Q2 – Braintree settlements



Source: EGi, Ramidus Consulting

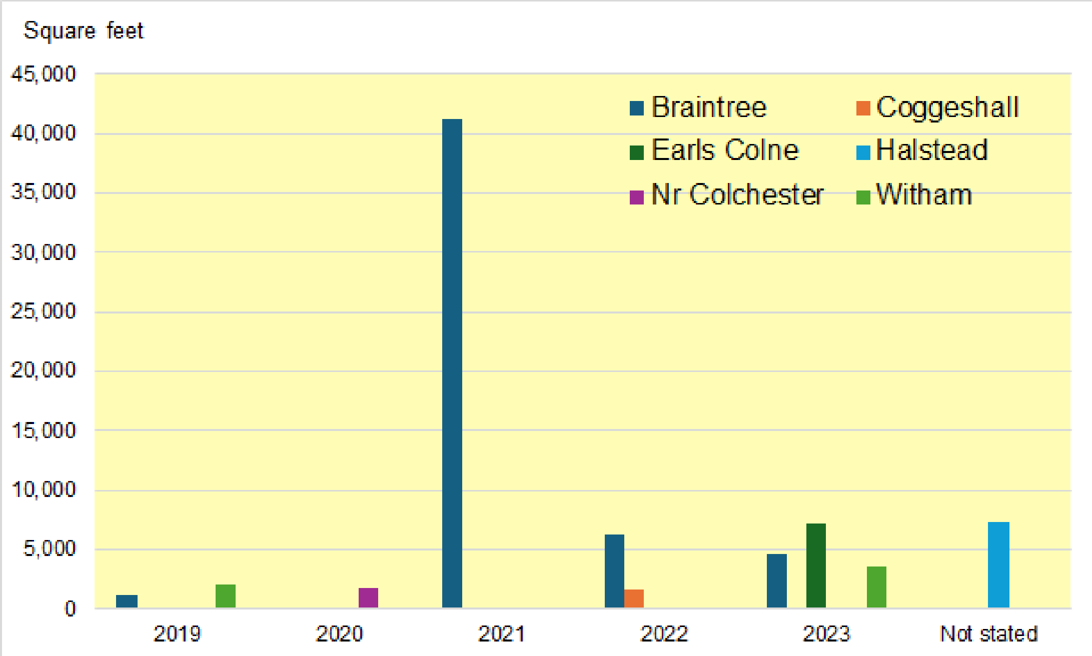
Figure 5.17 Office pipeline, 2016-2028 - Essex districts



Source: EGi

There is very little activity, all of it totalling less than c1,000 sq m (10,000 sq ft) in each year except 2022 (3,800 sq m (41,172 sq ft) in a single building) and 2023 (1,420 sq m (15,285 sq ft) in three buildings).

Figure 5.18 Office pipeline, 2016-2023 – Braintree settlements



Source: EGi, Ramidus Consulting

A note of Braintree District Council's activity

The District Council runs three enterprise centres at: The Plaza on Horizon 120, Braintree Enterprise Centre on Springwood Drive and Osier House in Sible Hedingham. Note that Rippers Court in Sible Headingham, although Council-owned, is managed by its main occupier. Although Council-owned, the centres are run as commercial enterprises aiming to provide quality accommodation at reasonable rents, while generating an income for the Council.

Collectively, when shared workspace is included, these centres support nearly 900 SMEs. The Plaza offers office space, as does Osier House, while Braintree Enterprise centre has occupiers covering the full gamut of B uses from coaters, to printers to dog groomers to health and wellbeing companies and even a "Rage Cage". With changes to working patterns in the post-Pandemic, the centres have helped to provide outworkers with an alternative to home offices, as well as initial space for small enterprises developing past homeworking, such as a company specialising in trade for high value Pokémon cards. Around 100 organisations use the shared workspace, either on a membership or pay-as-you-go basis, with feedback that it has helped support so-called "Water cooler" conversations and similar informal networking and collaboration.

All space in the three centres is either occupied or under offer at the time of enquiry.

Summary There is no escaping the fact that the commercial property market in Braintree is small in national terms, with very few of the large logistics sheds seen along much of the A14 and in places like Milton Keynes, and overwhelming focused on industrial and distribution. The general view in the market is that most demand is for B8 use and that this should be prioritised in policy and development control terms. There is very little property available and even less in the pipeline, at least in the short-term. The office market is negligible, with agents noting that it has moved almost entirely to serviced office provision, including Braintree's own facilities, some suggesting that even that may be at capacity.

If the District is to enhance its commercial property offer, it needs to identify some larger sites that may be attractive to inward investors. Both Skyline 120 and Horizon give clear evidence that with a good site, and with good access, development can be a success, even in the wake of Pandemic and economic crisis. That these schemes are largely driven by distribution and industrial, rather than offices is not surprising given the lack of critical mass for an office market.

It would help the market greatly if larger sites with good access could be designated, as would encouraging upgrades to existing sites, either via refurbishment or redevelopment and intensification. Extra planning policy attention could usefully be given to improving the supply of smaller units, purpose built with both start-ups and established SMEs in mind. One potential source of this is farm diversification.

5.3 Loss of employment space to residential

A major challenge facing local authorities is increasing the supply of housing, and even before the re-introduction of mandatory housing targets by the new Government, the conflict between commercial uses and residential uses has been growing. Especially in the south of England, residential land values far outstrip commercial properties, so it is only natural for commercial landowners to want to reap the attractions of residential by changing land use designations.

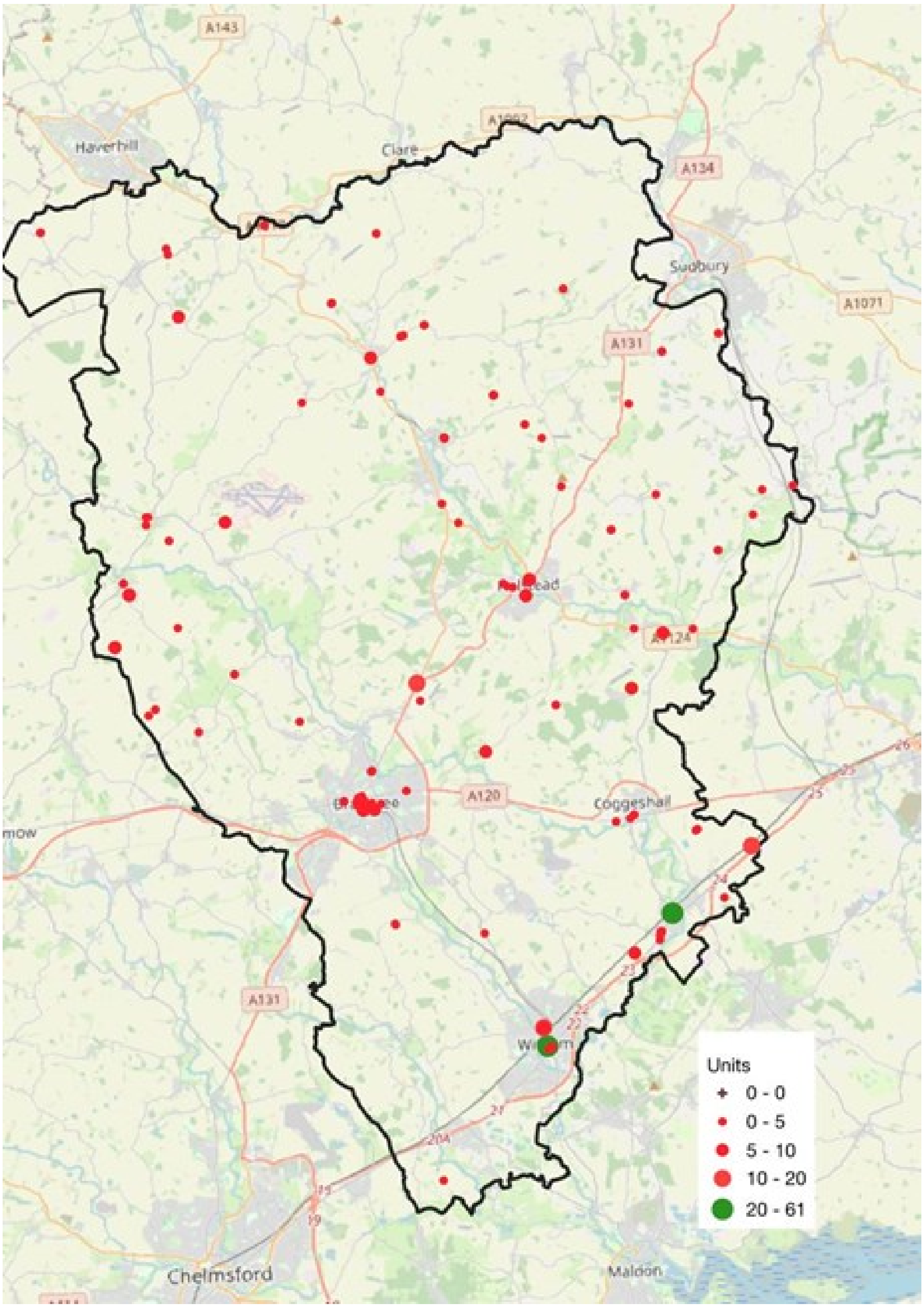
When it comes to this pressure, Braintree is no different, and yet it has its own distinct pattern. Figure 5.19 shows the distribution of planning applications for change of use to residential from 2016 to 2024. It is striking that there are a small number of reasonably large proposals or developments-under-construction, all close to or south of the A120, but a much more striking scatter of smaller schemes across the whole of the district. It seems likely that many of these smaller schemes are changes of use from agricultural uses, ranging from barn conversions, more general farm diversification or schemes such as the former garden centre in Coggeshall. These are outside the remit of this study.

There are a small number of notable losses of employment land, including: a large part of Hunnable Industrial Estate, Great Yeldham and a former office building in Crittall Road, Witham; the former Bloomfields significant concentration of small developments in Braintree town centre, consistent with a lot of over-shop conversion, most likely from offices or retail storage space.

But overall during this period, only 1,051 are built or proposed as a consequence of change of use. This is a relatively modest level that, although it is equivalent to around 600,000 sq ft of employment space, is more than offset by new space, especially in Braintree.

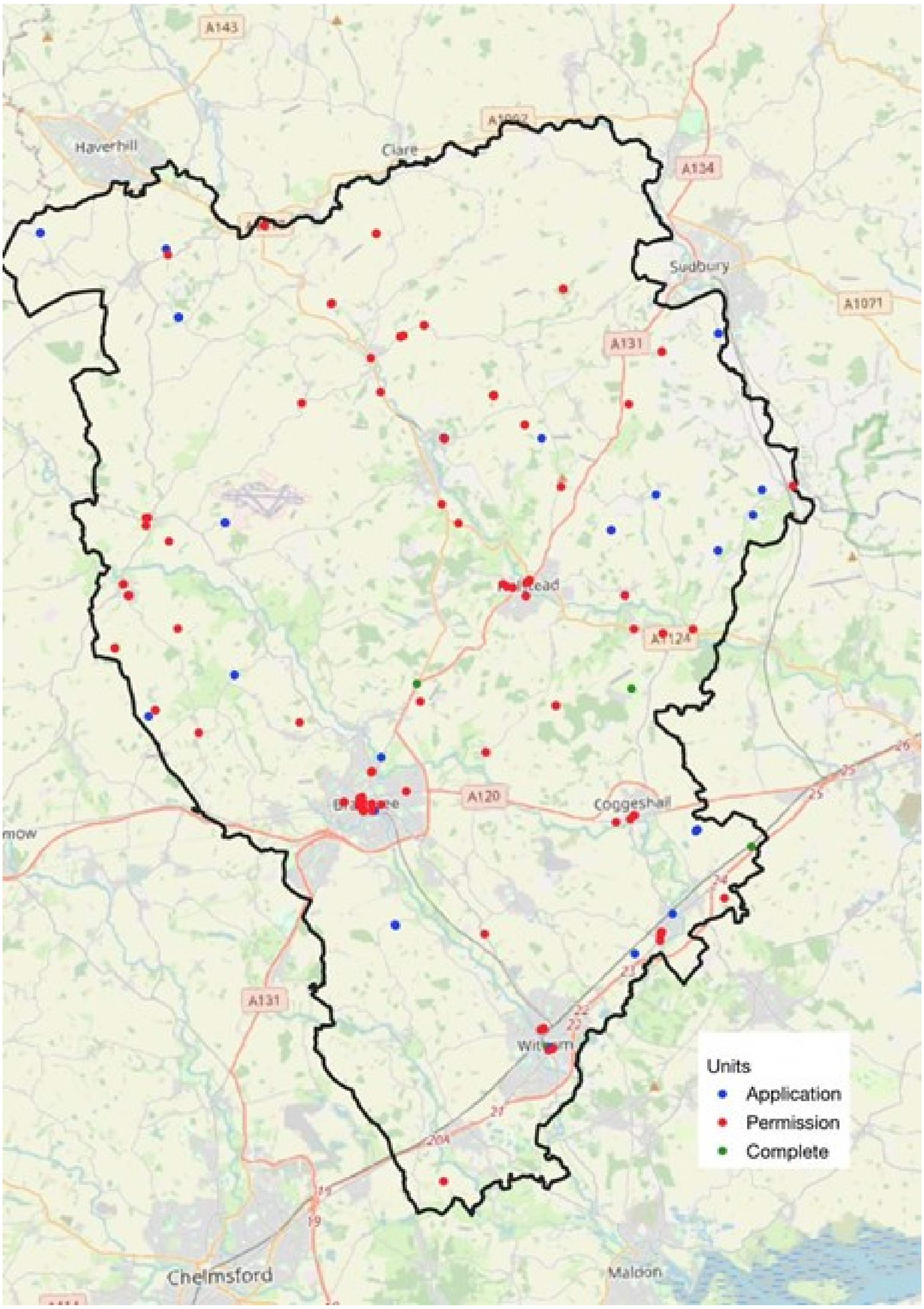
Figure 5.20 shows the same data by planning status and it is worth noting that half of these permissions are yet to be implemented. Further, only 134 units were deemed as 'planning not required' – i.e. via permitted development rights. This is a fairly modest total compared to many other local authorities in our experience and suggests that the Council has been effective at protecting its employment land.

Figure 5.19 Change of use to residential, by size, 2016-2024



Source: EGi

Figure 5.20 Change of use to residential by status, 2016-2024



Source: EGi

Figure 5.21 shows the distribution of units created by change of use and it is not surprising that Braintree contains the largest share with the other settlements taking more or less proportional shares. The A12 axis, which covers Kelvedon, Feering, Rivenhall and Hatfield Peverall may appear underrepresented, but this generally is part of the most well developed commercial markets in Braintree.

Figure 5.21 Distribution of change of use by settlement

Completion year	A12 Axis	Braintree	Coggeshall	Earls Colne	Halstead	North of A131	Near Colchester	Witham	Grand Total
2017		10					14		24
2018		31			31		5	9	76
2019		109		3	30	5	1	65	213
2020		68			33	1	6	10	118
2021		127	8		11			4	150
2022		34	4		16	10	16	3	83
2023		74	2	27	31	4	36	17	191
2024	5	13	9		19	27	18	19	110
2025		32			21	3	31	10	97
Not stated	1	261	6	10	110	18	30	63	499
Total	**6**	**759**	**29**	**40**	**302**	**68**	**157**	**200**	**1,561**

Source: EGi, Ramidus Consulting

5.4 2024 Call for Sites

The future supply of land could be affected by the amount of land designated as a result of the 2024 Call for Sites. This study has assessed, and made recommendations, on twenty-one such sites. Figure 5.22 provides a summary table of the sites and our recommendations, while the following pages summarise the detailed assessments of each site. The justifications for the recommendations shown here are included in the detailed site assessments.

Not included in this list is 'Land South of Witham Road and Mill Lane', a greenfield site that was added late in the assessment process. No site visit was possible, but geographical tools suggest that it is strikingly similar to 'Land off Ashes Road' and our conclusion is much the same: despite being a clear site, due to poor access it would only be viable in the context of a much larger proposal such as a Garden Community.

Figure 5.22 Summary of Call for Sites recommendations

Ref code	Site and location	Area (ha)	Recommendation
CfS01	Barlow Tyrie Ltd, Springwood Drive, Braintree	3.5	Appropriate for extension of site.
CfS02	Colne Valley Railway, Great Yeldham	5.2	Not appropriate for development.
CfS03	Blois Meadow Business Centre, Steeple Bumpstead	0.3	Appropriate for development, subject to Highways and flooding consideration.
CfS04	Land east of Bluebridge Industrial Estate, Halstead	12.1	Appropriate for development.
CfS05	Land north of West Street, Coggeshall	3.8	Not appropriate for development.
CfS06	Land north of Colchester Road, Coggeshall	2.4	Not appropriate for development.
CfS07	Land west of Queensborough Lane, Rayne	6.25	Not appropriate for development.
CfS08	Land adjoining Gosfield Airfield	21.0	Appropriate for development.
CfS09	Land at London Road, Feering	16.6	Not appropriate for development.
CfS10	Land off the A12, Rivenhall	22.5	Appropriate for development only in context of garden settlement.
CfS11	Land south of the A12, Kelvedon	43.4	Appropriate for development.
CfS12	Lynderswood Farm, Great Notley	3.0	Appropriate for development.
CfS13	Land at Slamseys Farm, Great Notley	3.8	Appropriate for development.
CfS14	Land off Ashes Road, Cressing	54.7	Appropriate for development only in context of a Garden Community.
CfS15	Pond Farm Field, Rivenhall	15.6	Appropriate for development.
CfS16	Shardloes Workshops, Cressing	0.33	Appropriate for extension of site, but a DM issue rather than strategic allocation.
CfS17	Hangar Field, Earls Colne	3.0	Planning consent already being implemented.
CfS18	Land NW of Old Council Yard, Great Yeldham	0.5	Appropriate for development, but a DM issue rather than strategic allocation.
CfS19	Land at Waterhouse, Dickett's Lane	0.3	Appropriate for development, but a DM issue rather than strategic allocation.
CfS20	Dunmow Road, Blake End	Access only	Not appropriate for development.
Total		**218.28**	
Total suitable for development		**105.40**	

CfS01 This 3.45ha site sits to the rear of the established Barlow Tyrie Ltd business on Springwood Drive. As can be seen, the proposed site would in effect be an 'infill' development between existing commercial uses.

The site has no obvious constraints and could be relatively easily accessed via the existing business from Southwood Drive. The proposed site appears to be an acceptable one in employment land terms and would suit B2 or B8 uses.

Barlow Tyrie Ltd, Springwood Drive, Braintree

Source: Google maps

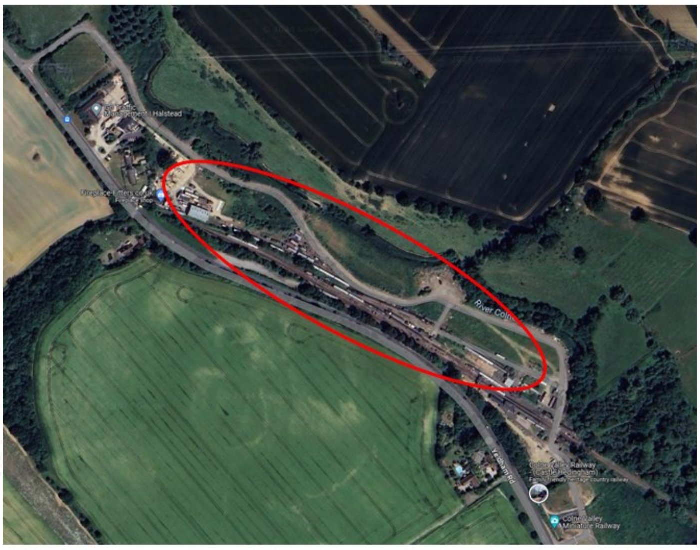
Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Adequate	Good	B class	Appropriate for development

CfS02 The site lies adjacent to the Colne Valley Railway Museum.

It is a relatively narrow strip of land and was originally bought to build housing. Access if from the A1071 Yeldham Road.

The River Colne runs through the site, and flooding is a significant issue. There is a council depot to the north of the site.

Colne Valley Railway, Great Yeldham

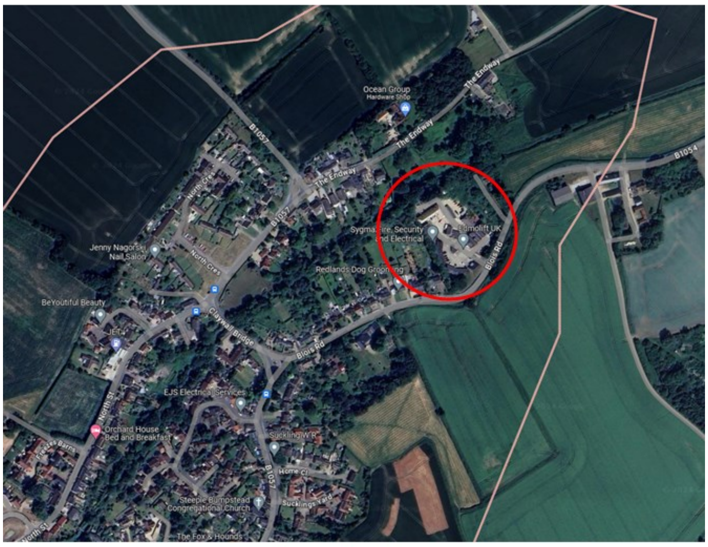


Source: Google maps

The 5.24ha site is isolated and it is unclear what type of market demand the site would be meeting. Together with the flood plain issues the site seems unsuitable for employment land or housing. Leisure options could be explored.

Site quality	Access	Potential	Suitable for	Recommendation
Poor	Adequate	Poor	None	Not appropriate for development

Blois Meadow Business Centre, Steeple Bumpstead



Source: Google maps

CfS03 The Business Centre is situated on the edge of Steeple Bumpstead village. It provides high quality, well managed employment space in a rural setting and appears to be fully occupied.

The proposed site comprises a small (0.3ha) extension to the rear of the existing site, utilising scrubland.

The proposed extension seems acceptable in employment land terms, provided flood issues can be addressed; the only question is whether the access (B1054 Blois Road) is adequate as signs already warn of increased traffic. Small offices and light industrial work well here.

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Adequate	Good	E class	Appropriate for development

Land east of Bluebridge Industrial Estate, Halstead

Source: Google maps

CfS04 The proposed site here sits to the east of the Bluebridge Industrial Estate in Halstead. The 12.08ha site would provide a significant addition to the existing stock. The site is well-serviced, with adequate parking and good access.

Development of the site would increase the critical mass and marketability of the overall estate. The previous northern extension, to create 6th Avenue, is developed and occupied by the Biogen facility and four sheds. There appear to be no reasons to oppose the new proposal in employment land terms, although it is likely to lean more towards industrial and smaller distribution, rather than logistics.

Site quality	Access	Potential	Suitable for	Recommendation
Good	Adequate	Good	B class	Appropriate for development

CfS05 The proposed site sits outside the main built-up area of Coggeshall, on the west side. The 3.77ha site is currently used for arable agriculture and sits between the A120 and West Street.

There is a relatively new residential development south, on the opposite side of West Street, which demonstrates the potential for such development in this area.

Land north of West Street, Coggeshall

Source: Google maps

It is not clear what commercial uses the promoter might have for the site, but it is most likely small light industrial units. It is the view of the assessment team that this site would not make a necessary addition to employment land and would probably create congestion on West Street in the absence of new access from the A120.

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Poor	Poor	None	Not appropriate for development

CfS06 This site lies immediately north of the A120 immediately east of the built-up area of Coggeshall. There is no other commercial or residential development north of the A120 in this location.

The 2.4ha site also lies adjacent to a long bend in the A120. Even if access off the main road could be achieved, (which is unlikely) the bend would present safety issues. The site is not suitable for commercial development.

Land north of Colchester Road, Coggeshall

Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Poor	Poor	None	Not appropriate for development

CfS07 The proposed 6.25ha site is currently used for arable agricultural land and is surrounded by low grade agricultural land, an equestrian centre and small scale commercial activity.

The fundamental issue with the site is access. Queenborough Lane is a narrow and winding road, reduced to one-way in places. Further, direct access to the site is not within the control of the landowner.

Land west of Queensborough Lane, Rayne

Source: Google maps

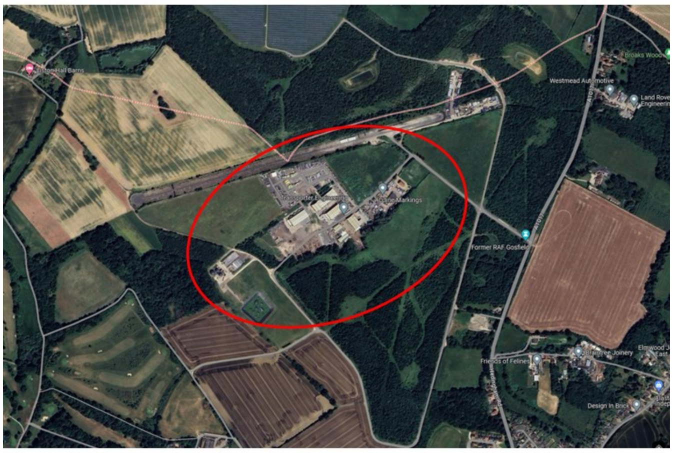
There does not seem to be a compelling reason to change the use of this land to employment land and, given the access issues, it is not recommended for designation.

Site quality	Access	Potential	Suitable for	Recommendation
Poor	Poor	Poor	None	Not appropriate for development

CfS08 Gosfield Airport is an established employment land location, accessible directly from the A1017 including various low density industrial activities that might otherwise be unneighbourly.

The proposed 20.95ha extension of the site would add a large amount of capacity to the existing site. The extension in fact comprises three discrete parcels of land. Access and servicing of the site is very good. The proposed site is currently used as arable agriculture.

Land adjoining Gosfield Airfield



Source: Google maps

Given the established low density use profile of Gosfield Airfield, there would seem to be no reason to object to the proposed extension of the site. It would be especially suited to distribution and processes that may be unneighbourly.

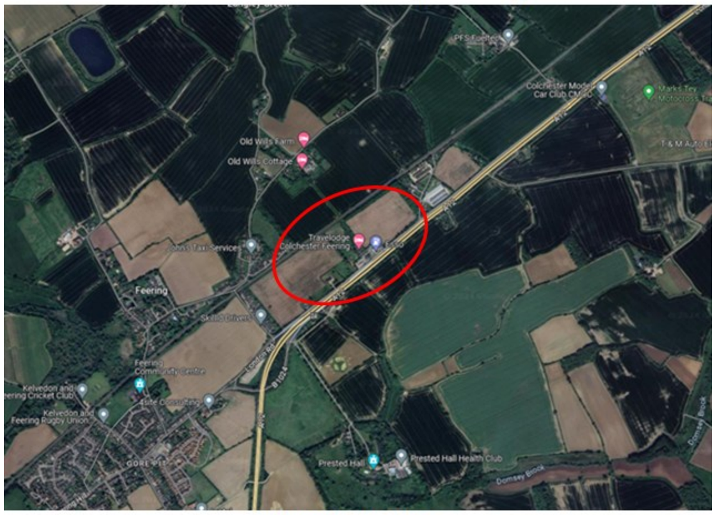
Site quality	Access	Potential	Suitable for	Recommendation
Good	Good	Good	B class	Appropriate for development

CfS09 This site sits next to the A12, and to the rear of an existing Travelodge Hotel, which is part of a service station including a filling station and cafe. The land is currently used as arable agriculture.

The site would be impacted by the proposed realignment of the A12 and it is not clear at this stage how the site would be accessed from the new road.

The 16.61ha site is comparatively remote from existing settlements and it is unclear what commercial demand the development would be satisfying. Given the uncertainty over access it is recommended that the site is not designated as employment land. Other commercial uses may be viable.

Land at London Road, Feering



Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Adequate	Poor	Other uses	Not appropriate for development

Land Off A12, Rivenhall

CfS10 The proposed site is situated between Kelvedon and Rivenhall and lies between the A12 to the south and the rail line to the north. The land is currently under arable agricultural use.

The development of the 22.45ha site originally came forward in proposals for a Garden Community. If the latter proceeds, then there is a reason to allocate a parcel of land to employment use, for local jobs. Even so, given that no access seems to be proposed as part of the A12 widening scheme, this will not form a strategic employment location and should not be designated as such.

Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Good	Poor	Adequate	Mixed use/Garden Community	Only if Garden Community

CfS11 The 43.38ha site just south of the A12 at Kelvedon is another site that is dependent upon the A12 to A120 DCO. The site is currently used for arable agriculture.

The land is clear and there are no obvious constraints to the development of the site. Given the scale of the site, it has the potential to provide for strategic logistics uses.

Land south of the A12, Kelvedon

Source: Google maps

While there remain uncertainties over delivery, given the strategic nature of the site, and that access provision appears to be part of the A12 improvements, it is recommended for designation, with a focus on B8.

Site quality	Access	Potential	Suitable for	Recommendation
Good	Good	Good	B class or inward investor	Appropriate for development

CfS12 Lynderswood Farm, situated to the south of Great Notley, includes a collection of commercial uses, including a large vehicle storage facility.

Access to the site is good, off London Road, and from there onto the A131. The former does not appear under particular strain.

The proposed designation comprises just 3.0ha of land. This would likely comprise E-class business units for SMEs of some sort. There seems to be no reason to object to the proposed designation.

Lynderswood Farm, Great Notley

Source: Google maps

Site quality	Access	Potential	Suitability for	Recommendation
Good	Adequate	Good	E class	Appropriate for development

CfS13 Slamseys Farm is situated immediately south of the built up area of Great Notley, and adjacent to the A131. The site also sits at the southern end of Horizon 120 and adjacent to the electric car charging station, Gridserve.

Land at Slamseys Farm, Great Notley

Source: Google maps

Access to the site is to the south, onto Blackley Lane. The only issue here is that Blackley Lane passes under the A131 via a single lane carriageway.

The proposed allocation is for a 3.0ha extension of the existing farm, which is likely to be suitable for SME business units. There do not appear to be any strong reasons for refusing the proposed extension as a small business centre, provided access is adequate, that is at least on a par with Lynderswood Farm. The site could be suitable as replacement stock if East Street is released.

Site quality	Access	Potential	Suitable for	Recommendation
Good	Adequate	Adequate	E class	Appropriate for development

CfS14 This large parcel of land lies to the south east of Braintree town, along Ashes Road to Cressing. The future of the 54.7ha site is in an area of Cressing that is proposed for development as a Garden Community. Ashes Road is a relatively minor road, and it is not clear how this would be improved. There would likely need to be a direct link to the A120.

Land off Ashes Road, Cressing

Source: Google maps

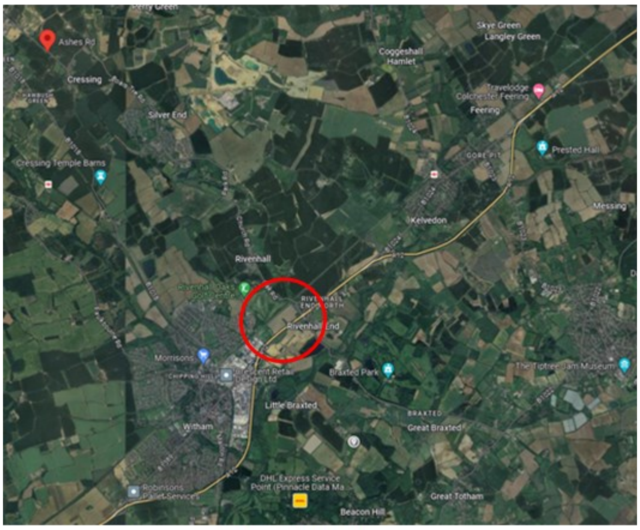
If a Garden Community proceeds, then there would appear to be compelling reason to provide some ancillary employment land. In the absence of such, it has inadequate access and would add to congestion at Galley's Corners.

Site quality	Access	Potential	Suitable for	Recommendation
Good	Poor	Poor	Mixed use/Garden Community	Only if Garden Community

CfS15 Pond Farm Field at Rivenhall comprises a 15.6ha site to the north east of the built-up area. The proposed site sits between the A12 and the rail line. It is currently accessed via Oak Road to the east. It is promoted as a transhipment site for road and rail which would involve the import and export of hard rock within England. The estimated throughput is 0.4 million tonnes per annum. Access for this use, including new rail spurs is unknown.

Significantly, the south eastern end of the site adjoins the industrial site in Witham and this would be key to unlocking the site, so even if the transhipment proposals fails, it is still worthy of designation.

Pond Farm, Rivenhall



Source: Google maps

If access to the proposed site could be achieved via the existing industrial site; and if a landscape buffer could be provided between the new development and Rivenhall End to the east, then the site looks reasonable in employment land terms. Feedback suggests that the opportunity to create a second access point to the Eastways estate would be welcome.

Site quality	Access	Potential	Suitable for	Recommendation
Good	Adequate	Adequate	B class/ sui generis	Appropriate for development

CfS16 Shardloes Workshops is a specialist classic car repair and restoration business, at the southern end of Cressing at the junction of Shardloes Land and Church Road.

The proposal is for a 0.33ha extension to the site.

There would seem to be no reason to oppose this proposal in employment land terms, albeit the proposal should perhaps be a Development Management issue rather than one for strategic land consideration.

Shardloes Workshops, Cressing

Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Poor	Adequate	Existing user extension	Appropriate via development control

CfS17 Hangar Field lies to the south of Earls Colne, along the B1024, and adjacent to The Essex Golf Club.

The 3.0ha site has already been granted a planning consent, and some enabling works seem to have been started.

Hangar Field, Earls Colne

Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Good	Good	Good	E or B uses	Appropriate for development

CfS18 This parcel of land is situated to the north of the Colne Valley Railway site, and adjacent to a Council depot.

The site is relatively remote in employment land terms. It is just 0.5ha in size and lacks any critical mass.

If the proposal is for a single occupier business, then the site might be viable. However, it is less viable as an open market opportunity.

In employment land terms, the proposal should perhaps be a Development Management issue rather than one for strategic land consideration.

Land NW of Old Council Yard, Great Yeldham

Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Adequate	Adequate	Adequate	E or B uses	Appropriate via development control

CfS19 This parcel of land is situated between the Colne Valley Railway site and the adjacent Council depot.

The site is relatively remote in employment land terms. It is just 0.3ha in size and lacks any critical mass.

The site has been subject to a planning application for use as B2 and B8.

In employment land terms, the proposal should perhaps be a Development Management issue rather than one for strategic land consideration.

Land at Waterhouse, Dickett's Hill

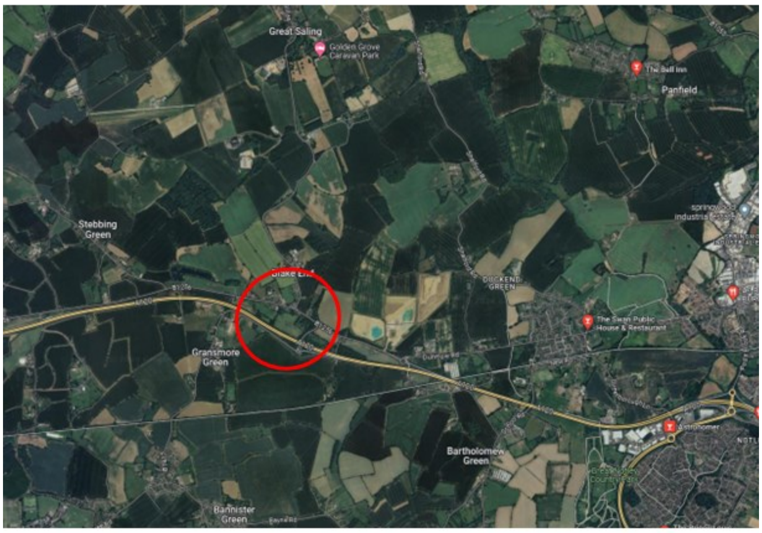
Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Poor	Poor	Adequate	E or B uses	Appropriate via development control

CfS20 This is unusual in that the only the entrance to the main site is in Braintree District, while the main site itself is situated in Uttlesford District. Main access is via the westbound carriageway of the A120 about 500m away, via the B1256. The only access from the east is via minor roads from Rayne.

The River Ter runs through the site, and overall it has little to recommend it as employment land.

Dunmow Road, Blake End, Rayne



Source: Google maps

Site quality	Access	Potential	Suitable for	Recommendation
Poor	Poor	Poor	None	Not appropriate for development

6.0 Designated employment land

This section is based on field work assessing each of the designated employment sites in Braintree District. The visits took place in early July 2024 and some sites were revisited later in the same month. All existing designated sites were visited, and in the course of this work a small number of undesignated or mis-designated were identified and we propose corrections.

Approach

During our visits we observed and recorded site details including site vitality, accessibility, congestion, utilisation and overall quality. The analysis of these criteria was then consolidated to create an overall evaluation to form a basis for our recommendation, which is then distilled as a red-yellow-green classification in the summary table.

In general, there should be a strong reason for de-designating a site, for example it having already been lost to other uses, dereliction, wholesale vacancy or irredeemably inadequate infrastructure. Notes of changes to the real-world boundaries are also made, and updating boundaries recommended where appropriate.

6.1 Summary assessment

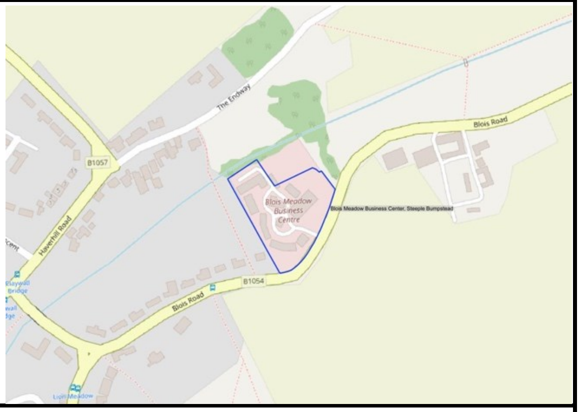
Most sites are recommended for retention because we found very few indications of distress and signs that the best sites were being actively managed. Several have suffered a degree of incursion by residential develop and we suggest revisions to boundaries. These are summarised in Fig 6.1, with detailed records in Section 6.2.

Figure 6.1: Summary of recommendations

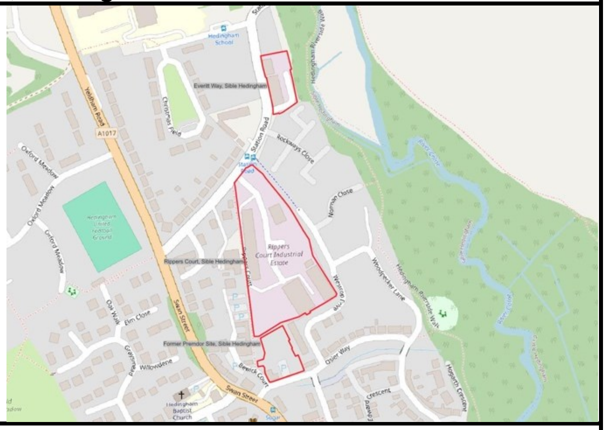
Site	Recommendation
Phoenix Road, Haverhill	Retain as employment land.
Blois Meadows Business Park, Steeple Bumpstead	Retain as employment land.
Hunnable Industrial Estate, Great Yeldham	De-designate.
Rippers Court Industrial Estate, Everitt Way; ex-Premdor site (now Osier House), Sible Hedingham	Retain as employment land, merge into single designation.
Gosfield Airfield Business Park	Retain for employment use – add the former runway since this is being used, as shown. Consider added sites offer in Call For Sites.
Broton Road Industrial Area, Halstead	Retain for employment use.
Factory Lane West, Halstead	Retain and extend to boundaries to reflect reality.
Bluebridge Industrial Estate, Halstead	Retain for employment use. Consolidate extensions into single area.
Riverside Business Park, Earls Colne	Retain for employment uses.
Atlas Works and Hunts Yard, Factory Lane, Earls Colne	Retain as employment use. NB site is incorrectly mapped on policy documents. Amend as shown.
Brookhill Park, Earls Colne	Redesignate as employment use.
Earls Colne Airfield	Retain for employment uses.
Springwood Industrial Estate, Braintree plus C30 extension, Braintree	Retain for employment use – merge with C30 extension already designated.
Skyline 120, Braintree	Retain for employment uses.
Various Braintree town centre sites	Retain for employment. Separate Driberg Way from other town centre locations. Treat remainder as single site for better strategic planning and reduce attritional loss. Consider releasing East Street, subject to suitable alternative being found.
Allshots Farm, Rivenhall	Retain for employment uses.
Priors Way Coggeshall	Retain for employment use – redraw boundaries.
Threshelfords, Feering	Retain for employment use if not compromised by nearby residential development.
London Road Kelvedon	Retain for employment uses unless Knight Group vacates. Extend boundaries to entire site.
Kelvedon Railway Station	Unless a specialist developer can be attracted, most likely to feel pressure for residential development. De-designate. Develop planning brief for residential-led mixed use.
Eastways, Witham	Retain for employment use. Merge adjacent extension.
Freebournes, Witham	Retain for employment use.
Witham Town Centre	Retain for employment use – no other large office buildings.
Lynderswood Farm, Black Notley	Retain for employment use.
Horizon 120, Great Notley	Retain for employment use, extend boundary to Phase 2.
Kelvedon Park, Rivenhall End	Retain as Special Employment Area.
Maltings Lane/Gershwin Park Witham	Retain for employment use.

6.2 Detailed employment site assessments

Site assessment: C1: Phoenix Road, Haverhill		
Site		
Description and uses	Part of the wider Haverhill industrial area, with warehouses and a hotel. Occupiers include storage tank maker, pet food supplier, building supplies.	
Quality and vacancy	Environment/public realm	Good condition
	Building condition and age	Mainly modern and on good condition
	Vacancy and under-utilisation	One large warehouse on the market. Development site on the market
	Dereliction	None
Constraints	Access - car	Excellent, from A1017
	Access - van	Excellent, from A1017
	Access - HGV	Very Good from A1017
	Ecological issues	None obvious
	Neighbourliness	Not an issue – within industrial area
Service and parking	Circulation	Slightly constrained for largest HGVs
	Parking facilities	Private car parks, on street parking
	Loading bays	Fine on most modern space
	Servicing	Straightforward
Access	Strategic road	A1017
	Public transport	None obvious
Potential	Residential incursion?	None
	High growth sectors?	None
Suitability for	Office	Not applicable
	Industrial	Good
	Warehousing	Excellent
	SMEs	Not suitable
	Affordable space	Not suitable
	Scope for intensification	Minimal
Recommendation	Retain as employment land.	

Site assessment: C3 Blois Meadows Business Park, Steeple Bumpstead		
Site		
Description and uses	A small development, in a small village consisting of small B1a and B1c-style buildings, constructed in a vernacular style, with a variety of lifestyle businesses.	
Quality and vacancy	Environment/public realm	Well maintained
	Building condition and age	All appeared in good condition
	Vacancy and under-utilisation	A couple of apparently empty units
	Dereliction	None
Constraints	Access - car	Adequate. Sign post indicates increased traffic
	Access - van	Adequate
	Access - HGV	B1054 not suited to HGVs
	Ecological issues	Close to flood area
	Neighbourliness	Seems good. A quiet rural location
Service and parking	Circulation	No issues
	Parking facilities	Adequate
	Loading bays	Not applicable
	Servicing	No obvious issues
Access	Strategic road	Poor
	Public transport	Somewhat remote via busses
Potential	Residential incursion?	None
	High growth sectors?	Some personal service firms
Suitability for	Office	Good
	Industrial	B1c only
	Warehousing	No
	SMEs	Yes
	Affordable space	Possibly
	Scope for intensification	Minimal
Recommendation	Retain as employment land.	

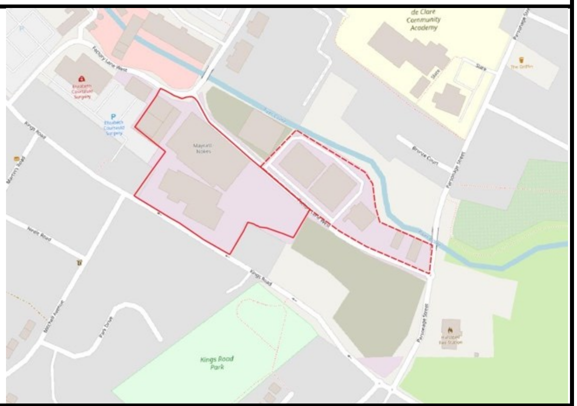
Site assessment: C5 Hunnable Industrial Estate, Great Yeldham		
Site		
Description and uses	Remnant of a larger industrial estate, partially lost to housing, close to the A1017. Appears largely derelict, with only one building occupied.	
Quality and vacancy	Environment/public realm	Poor
	Building condition and age	Very poor
	Vacancy and under-utilisation	Clear underutilisation
	Dereliction	Extensive
Constraints	Access - car	Good
	Access - van	Good
	Access - HGV	Good
	Ecological issues	None evident
	Neighbourliness	Average
Service and parking	Circulation	Adequate
	Parking facilities	Adequate
	Loading bays	Not applicable
	Servicing	Minimal requirement
Access	Strategic road	Adequate
	Public transport	Poor
Potential	Residential incursion?	Bulk of original sight lost to residential
	High growth sectors?	No
Suitability for	Office	Poor
	Industrial	Adequate
	Warehousing	Adequate
	SMEs	Adequate
	Affordable space	Adequate
	Scope for intensification	Good
Recommendation	De-designate.	

Site assessment: C7 Rippers Court Industrial Estate, Everitt Way; ex-Premdor site, Hedingham		
Site address		
Description and uses	Small council-owned industrial area and smaller motor services focused set of buildings on Everitt Way.	
Quality and vacancy	Environment/public realm	Reasonable
	Building condition and age	Good, well maintained – 70s/80s
	Vacancy and under-utilisation	No obvious signs
	Dereliction	None
Constraints	Access - car	Good, although off a residential road
	Access - van	Good, although off a residential road
	Access - HGV	Adequate – a haulage firm is an occupiers
	Ecological issues	None obvious
	Neighbourliness	Average – traffic likely an issue at times
Service and parking	Circulation	Somewhat restricted
	Parking facilities	Sufficient
	Loading bays	Adequate for current users
	Servicing	Adequate
Access	Strategic road	Near A1017
	Public transport	Busses – frequency unknown
Potential	Residential incursion?	No, but hemmed in
	High growth sectors?	Maybe
Suitability for	Office	For small units
	Industrial	Small scale
	Warehousing	Smaller scale
	SMEs	Good. Small units available
	Affordable space	Potentially
	Scope for intensification	None
Recommendation	Retain as employment land, merge with C32 Osier House.	

C32 Osier House, Osier Way Sible Hedingham		
Site	(mapped above)	
Description and uses	A standalone new office building on the former Premdor site.	
Quality and vacancy	Environment/public realm	OK – a little unkempt in immediate surrounds
	Building condition and age	Very good
	Vacancy and under-utilisation	Some availability
	Dereliction	None
Constraints	Access - car	On site parking
	Access - van	Unknown
	Access - HGV	No
	Ecological issues	None
	Neighbourliness	Good
Service and parking	Circulation	Not applicable
	Parking facilities	On site
	Loading bays	Not applicable
	Servicing	Good
Access	Strategic road	A1017
	Public transport	Busses, frequency unknown
Potential	Residential incursion?	None, but surrounded
	High growth sectors?	Perhaps
Suitability for	Office	Good
	Industrial	N/A
	Warehousing	N/A
	SMEs	Yes
	Affordable space	Yes
	Scope for intensification	N/A
Recommendation	Retain for employment land, merge with C7 Rippers Court.	

Site assessment: C8 Gosfield Airfield Business Park		
Site		
Description and uses	A low density business park on a redundant former airfield containing engineering activity, other industrial processes and a vehicle transporter manufacturer.	
Quality and vacancy	Environment/public realm	In good order, with plenty of space around
	Building condition and age	Reasonably modern shed-style warehousing and outside storage
	Vacancy and under-utilisation	No obvious signs
	Dereliction	None
Constraints	Access - car	Excellent
	Access - van	Excellent
	Access - HGV	Excellent – weighbridge on site
	Ecological issues	Nothing obvious
	Neighbourliness	Not near settlements
Service and parking	Circulation	Outstanding
	Parking facilities	On site, plentiful
	Loading bays	No problems
	Servicing	Good
Access	Strategic road	A1017
	Public transport	No
Potential	Residential incursion?	No
	High growth sectors?	Potentially
Suitability for	Office	Good
	Industrial	Excellent
	Warehousing	Excellent
	SMEs	No
	Affordable space	No
	Scope for intensification	High
Recommendation	Retain for employment use – add the former runway since this is being used, as shown. Consider added sites offer in Call For Sites.	

Site assessment: C9 Broton Road Industrial Area, Halstead		
Site		
Description and uses	A cluster of industrial properties with significant engineering activity including some noise generation.	
Quality and vacancy	Environment/public realm	Minor congestion, reflecting busy uses
	Building condition and age	Generally good, older buildings well maintained
	Vacancy and under-utilisation	None obvious – a 1.3ha consented industrial site on the market
	Dereliction	None
Constraints	Access - car	Adequate – parking nearby
	Access - van	Good
	Access - HGV	Poor
	Ecological issues	Contamination likely
	Neighbourliness	Poor - noise
Service and parking	Circulation	Adequate
	Parking facilities	Good
	Loading bays	Average
	Servicing	Adequate
Access	Strategic road	A131
	Public transport	Bus
Potential	Residential incursion?	None obvious
	High growth sectors?	No
Suitability for	Office	Poor
	Industrial	Good
	Warehousing	Average
	SMEs	Good
	Affordable space	Average
	Scope for intensification	Limited
Recommendation	Retain for employment use.	

Site assessment: C10 Factory Lane West, Halstead		
Site		
Description and uses	Cluster of buildings, Matcast-Nokes by far the largest, with a group of workshops across the road.	
Quality and vacancy	Environment/public realm	Hard to say – active development ongoing
	Building condition and age	Average – older but well maintained
	Vacancy and under-utilisation	None
	Dereliction	None, but redevelopment ongoing
Constraints	Access - car	Adequate
	Access - van	Adequate
	Access - HGV	Poor
	Ecological issues	Close to the River Colne
	Neighbourliness	Average, may become an issues as housing is built
Service and parking	Circulation	Poor
	Parking facilities	Poor
	Loading bays	Not applicable
	Servicing	Poor
Access	Strategic road	Town centre location. Town on A131
	Public transport	Bus
Potential	Residential incursion?	Yes
	High growth sectors?	No
Suitability for	Office	No
	Industrial	Yes - light
	Warehousing	No
	SMEs	Yes
	Affordable space	Yes
	Scope for intensification	Minimal
Recommendation	Retain and extend to boundaries indicated on map.	

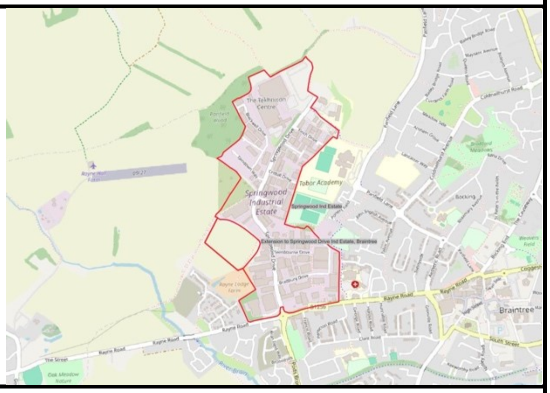
Site assessment: C11 Bluebridge Industrial Estate, Halstead		
Site		
Description and uses	A large 25ha industrial estate, consisting largely of 'shed' style buildings of various ages, some still with asbestos roofing.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	1960s and onwards – good condition
	Vacancy and under-utilisation	No obvious signs of distress
	Dereliction	None
Constraints	Access - car	Excellent
	Access - van	Excellent
	Access - HGV	Excellent
	Ecological issues	None obvious
	Neighbourliness	Not applicable
Service and parking	Circulation	Excellent
	Parking facilities	Good
	Loading bays	Good
	Servicing	Excellent
Access	Strategic road	A1124; A131 only via town centre
	Public transport	Bus
Potential	Residential incursion?	No
	High growth sectors?	Potentially
Suitability for	Office	Average
	Industrial	Excellent
	Warehousing	Excellent
	SMEs	Limited
	Affordable space	Potentially
	Scope for intensification	Slight. Expansion more likely
Recommendation	Retain for employment use. Consolidate extensions into single area.	

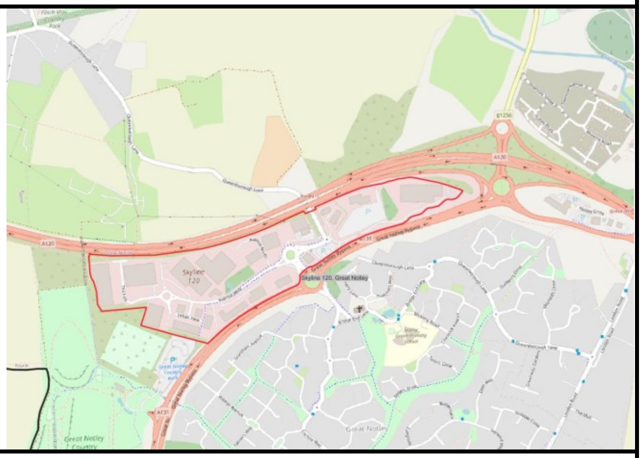
Site assessment: C13 Riverside Business Park, Earls Colne		
Site		
Description and uses	A small mixed-use business park/industrial estate on the outskirts of Earls Colne.	
Quality and vacancy	Environment/public realm	Fair
	Building condition and age	Older stock, mainly well maintained
	Vacancy and under-utilisation	No obvious signs
	Dereliction	None
Constraints	Access - car	Adequate via Station Road
	Access - van	Adequate
	Access - HGV	Poor
	Ecological issues	Close to River Colne
	Neighbourliness	Reasonable
Service and parking	Circulation	Adequate
	Parking facilities	Adequate, no obvious congestion
	Loading bays	Appears adequate
	Servicing	Adequate
Access	Strategic road	Poor – A1124 via Station Road
	Public transport	Bus
Potential	Residential incursion?	One building lost to residential
	High growth sectors?	No
Suitability for	Office	Small units
	Industrial	Small units
	Warehousing	Small units
	SMEs	Yes
	Affordable space	Potentially
	Scope for intensification	Minimal
Recommendation	Retain for employment uses. Redraw as indicated.	

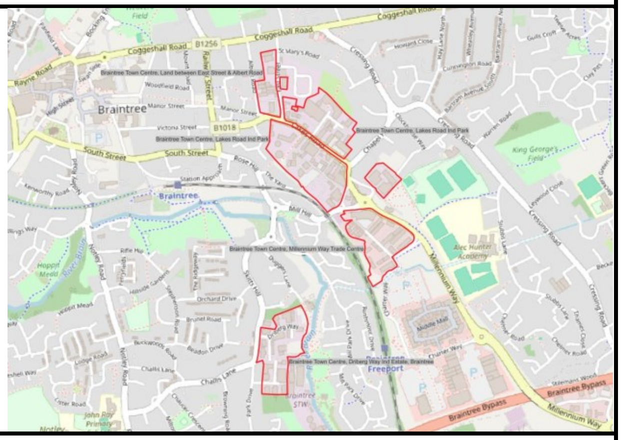
Site assessment: C12b Atlas Works and Hunts Yard, Factory Lane, Earls Colne		
Site		
Description and uses	A small estate of converted workshops off the town centre and including an NFU Mutual office and marketing firm and possibly some live-work space (planning history suggests this).	
Quality and vacancy	Environment/public realm	Good suburban-style location in good order
	Building condition and age	Converted period buildings
	Vacancy and under-utilisation	Some on Hunts Yard
	Dereliction	None
Constraints	Access - car	Good
	Access - van	Average
	Access - HGV	Poor (not applicable)
	Ecological issues	None evident
	Neighbourliness	Good – is surrounded by housing
Service and parking	Circulation	Adequate
	Parking facilities	Good
	Loading bays	Not applicable
	Servicing	Seems adequate
Access	Strategic road	Poor – A 1124 to A131 at Halsted or A120 at Coggeshall
	Public transport	Bus
Potential	Residential incursion?	Live-work space consented
	High growth sectors?	No
Suitability for	Office	Good
	Industrial	Poor
	Warehousing	Poor
	SMEs	Good
	Affordable space	Potentially
	Scope for intensification	No
Recommendation	Retain as employment use. NB site is incorrectly mapped on policy documents. Amend as shown.	

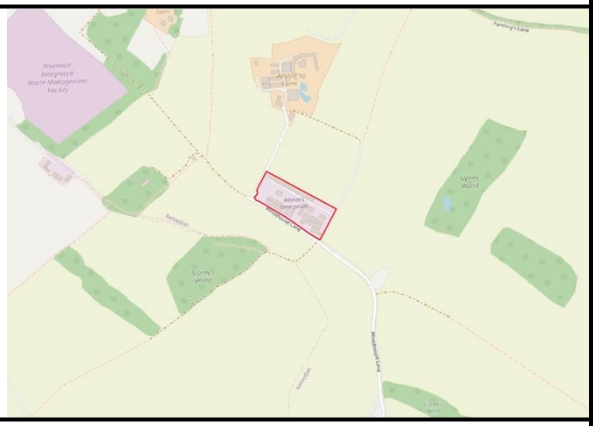
Site assessment: C12a Brookhill Park, Earls Colne		
Site		
Description and uses	Very low density site occupied by Colne Stoves fireplace store. NB incorrectly tagged at Atlas Works). Site for sale as commercial development opportunity.	
Quality and vacancy	Environment/public realm	Poor
	Building condition and age	Poor
	Vacancy and under-utilisation	Very low density usage
	Dereliction	None
Constraints	Access - car	Good
	Access - van	Good
	Access - HGV	Adequate
	Ecological issues	None obvious
	Neighbourliness	Average
Service and parking	Circulation	Poor
	Parking facilities	On site
	Loading bays	Not applicable
	Servicing	Not applicable
Access	Strategic road	Poor
	Public transport	Bus
Potential	Residential incursion?	Adjacent
	High growth sectors?	Not as it stands
Suitability for	Office	Potentially
	Industrial	No
	Warehousing	Potentially
	SMEs	Potentially
	Affordable space	Potentially
	Scope for intensification	High
Recommendation	Retain for employment uses.	

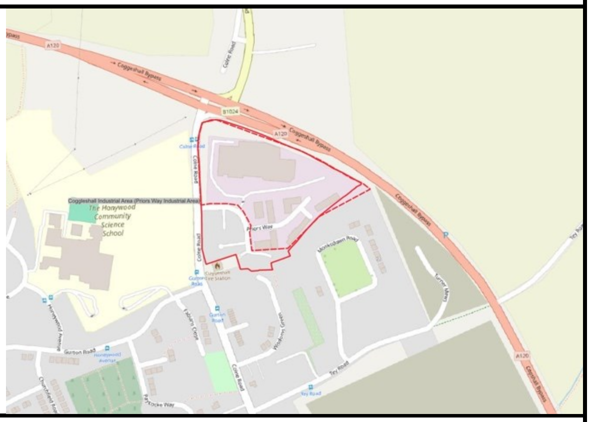
Site assessment: C14 Earls Colne Airfield		
Site		
Description and uses	Low density business park attached to the working Earls Colne airfield with uses ranging from B1a to B8 and Sui Generis (cement plant).	
Quality and vacancy	Environment/public realm	Very good and well maintained
	Building condition and age	Good – typical of Late 80s/90s ex-urban developments
	Vacancy and under-utilisation	No obvious signs – one unit on the market
	Dereliction	None
Constraints	Access - car	Via private roads
	Access - van	Via private roads
	Access - HGV	Via private roads – not all suitable for HGV
	Ecological issues	Possible water related challenges (there seem to be a few balancing ponds)
	Neighbourliness	Not applicable
Service and parking	Circulation	No issues
	Parking facilities	Very good
	Loading bays	Very good
	Servicing	Very Good
Access	Strategic road	B1024 to A120
	Public transport	No indication
Potential	Residential incursion?	None
	High growth sectors?	Potentially
Suitability for	Office	Good
	Industrial	Adequate
	Warehousing	Very good
	SMEs	Probably not – units too large
	Affordable space	No
	Scope for intensification	High
Recommendation	Retain in employment use.	

Site assessment: C15 Springwood Industrial Estate, Braintree plus C30 extension		
Site		
Description and uses	A very large (63ha) well established and diverse industrial estate on the western outskirts of Braintree.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	Mainly good – some new development
	Vacancy and under-utilisation	Some units on market, no signs of distress
	Dereliction	Minimal
Constraints	Access - car	Very Good, 800m from A131. Peak hours congestion
	Access - van	Very Good, 800m from A131
	Access - HGV	Very Good, 800m from A131
	Ecological issues	None obvious
	Neighbourliness	Self-contain so no real issues
Service and parking	Circulation	Very good
	Parking facilities	Very good
	Loading bays	Good where required
	Servicing	No problems
Access	Strategic road	Very Good, 800m from A131
	Public transport	Poor
Potential	Residential incursion?	No, but minor retail incursion
	High growth sectors?	Yes
Suitability for	Office	OK
	Industrial	Very good
	Warehousing	Very good
	SMEs	Yes
	Affordable space	Yes
	Scope for intensification	As older stock is upgraded
Recommendation	Retain for employment use – merge in C30 extension already designated.	

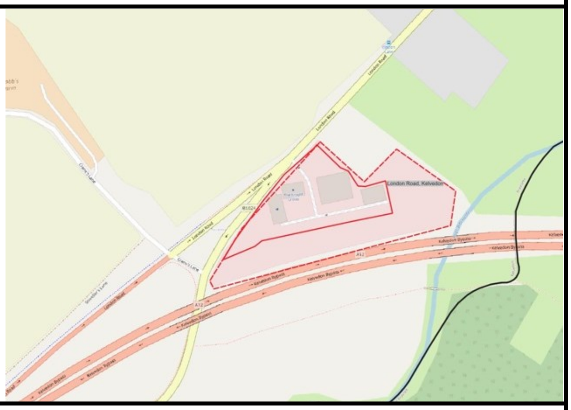
Site assessment: C18 Skyline 120 business park, Braintree		
Site		
Description and uses	Essentially linear 19ha modern business park between the A120 and A131. Largely B8 but with serviced office.	
Quality and vacancy	Environment/public realm	Excellent
	Building condition and age	Excellent
	Vacancy and under-utilisation	None
	Dereliction	None
Constraints	Access - car	Excellent
	Access - van	Excellent
	Access - HGV	Very good
	Ecological issues	None
	Neighbourliness	Good
Service and parking	Circulation	Very good
	Parking facilities	Excellent
	Loading bays	Very good where required
	Servicing	Good
Access	Strategic road	Outstanding
	Public transport	Poor
Potential	Residential incursion?	None
	High growth sectors?	Potentially
Suitability for	Office	Good
	Industrial	Good
	Warehousing	Excellent
	SMEs	Good
	Affordable space	Good
	Scope for intensification	No
Recommendation	Retain for employment use.	

Site assessment: C19 Various Braintree town centre sites		
Site		
Description and uses	Group of mainly older industrial sites, centred along Driberg Way, Lakes Road and Century Drive.	
Quality and vacancy	Environment/public realm	Adequate
	Building condition and age	Mainly older stock, some asbestos roofing
	Vacancy and under-utilisation	Minor
	Dereliction	None, but aging stock
Constraints	Access - car	Adequate, some via residential roads
	Access - van	Adequate, some via residential roads
	Access - HGV	Poor
	Ecological issues	None
	Neighbourliness	Average
Service and parking	Circulation	Congested
	Parking facilities	Congested
	Loading bays	Not applicable
	Servicing	Congested
Access	Strategic road	Awkward via Galley's Corner
	Public transport	Busses
Potential	Residential incursion?	Already pressure at East Street
	High growth sectors?	No
Suitability for	Office	No
	Industrial	Light
	Warehousing	Small
	SMEs	Yes
	Affordable space	Yes
	Scope for intensification	Minimal due to residential nearby
Recommendation	Retain for employment - Separate Driberg Way out from other Town Centre locations. Treat remainder as single site for better strategic planning and reduce loss by attrition. Consider releasing East Street if suitable land can be identified away from the town centre.	

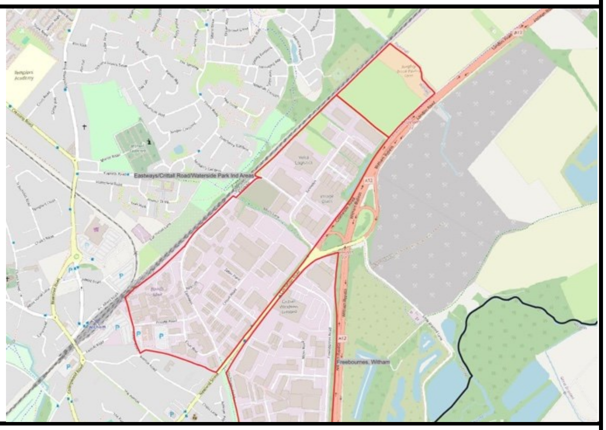
Site assessment: C20 Allshots Farm, Rivenhall		
Site		
Description and uses	A small collection of buildings at the former Polish camp about 2km east of Silver End.	
Quality and vacancy	Environment/public realm	A little unkempt, but OK
	Building condition and age	Old – possibly 1950s conversions. Adequate condition, but asbestos roofs
	Vacancy and under-utilisation	Some
	Dereliction	None
Constraints	Access - car	Poor, along narrow roads
	Access - van	Poor, along narrow roads
	Access - HGV	Poor, along narrow roads
	Ecological issues	None obvious
	Neighbourliness	Not applicable
Service and parking	Circulation	Restricted
	Parking facilities	Adequate
	Loading bays	Not applicable
	Servicing	Poor
Access	Strategic road	Poor
	Public transport	No
Potential	Residential incursion?	No
	High growth sectors?	No
Suitability for	Office	Poor
	Industrial	Adequate for light industrial
	Warehousing	No
	SMEs	Yes
	Affordable space	Potentially
	Scope for intensification	Minimal
Recommendation	Retain for employment use.	

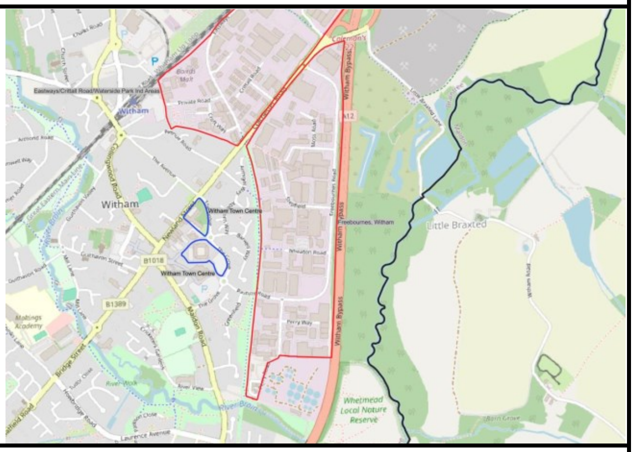
Site assessment: C21 Priors Way Coggeshall		
Site		
Description and uses	Small, 3.7ha, estate in the north of Coggeshall comprising the Anglia Cargo Terminal and a group of small light industrial units.	
Quality and vacancy	Environment/public realm	Generally in good order and well maintained
	Building condition and age	Large warehouse and c1980s-style B1c units in good condition
	Vacancy and under-utilisation	Nothing obvious
	Dereliction	None
Constraints	Access - car	Excellent
	Access - van	Excellent
	Access - HGV	Excellent
	Ecological issues	None obvious
	Neighbourliness	Average
Service and parking	Circulation	Good
	Parking facilities	Above average
	Loading bays	Where required
	Servicing	No obvious impediments
Access	Strategic road	100m from A120
	Public transport	Busses
Potential	Residential incursion?	Well established residential development within boundary
	High growth sectors?	No
Suitability for	Office	Poor
	Industrial	Good
	Warehousing	Very good
	SMEs	Yes
	Affordable space	Potentially
	Scope for intensification	No
Recommendation	Retain for employment use – redraw boundaries as indicated.	

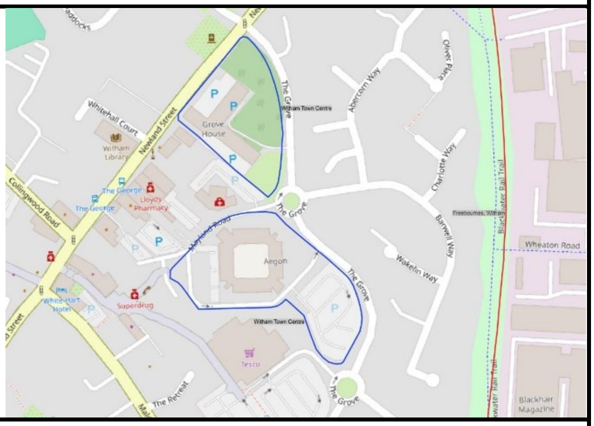
Site assessment: C22 Threshelfords, Feering		
Site		
Description and uses	A small self-styled rural business park of small units off the B1023.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	Excellent – buildings appear modern
	Vacancy and under-utilisation	None obvious
	Dereliction	None
Constraints	Access - car	Adequate, via Kelvedon town centre
	Access - van	Adequate, via Kelvedon Town Centre
	Access - HGV	Poor
	Ecological issues	None obvious
	Neighbourliness	Good
Service and parking	Circulation	Good
	Parking facilities	Very good
	Loading bays	Not applicable
	Servicing	Good
Access	Strategic road	Poor via Kelvedon Town Centre
	Public transport	Poor via busses
Potential	Residential incursion?	Yes – one unit lost to Prior Approval
	High growth sectors?	Potentially
Suitability for	Office	Good
	Industrial	Poor
	Warehousing	Poor
	SMEs	Yes
	Affordable space	Yes
	Scope for intensification	No
Recommendation	Retain for employment use if not compromised by nearby residential development.	

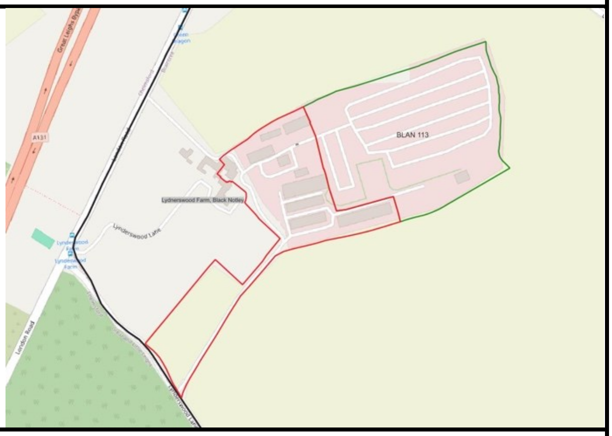
Site assessment: C23 London Road Kelvedon		
Site		
Description and uses	Small business area comprising two office buildings and two small warehouses, mainly occupied by The Knight Group and with a strong civil engineering focus.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	Good
	Vacancy and under-utilisation	None
	Dereliction	None
Constraints	Access - car	Good via B1024
	Access - van	Good
	Access - HGV	Adequate
	Ecological issues	None obvious
	Neighbourliness	Good
Service and parking	Circulation	Good
	Parking facilities	Good
	Loading bays	Good
	Servicing	Good
Access	Strategic road	Adjacent to A12 junction
	Public transport	Busses somewhat remote
Potential	Residential incursion?	None evident
	High growth sectors?	No
Suitability for	Office	Adequate
	Industrial	Average
	Warehousing	Good
	SMEs	Potentially
	Affordable space	No
	Scope for intensification	No
Recommendation	Retain for employment uses unless Knight Group vacates. Extend boundaries to entire site as shown.	

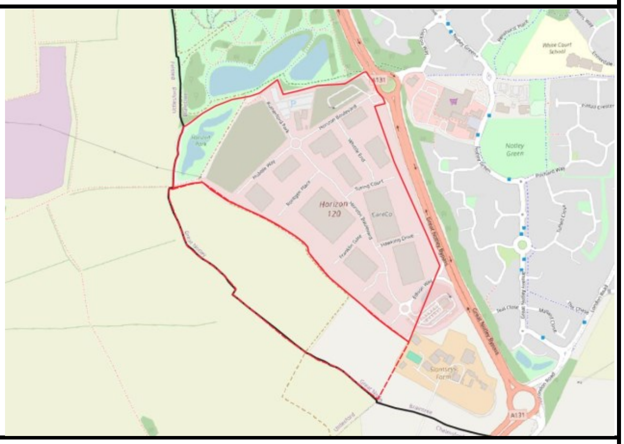
Site assessment: C24 Kelvedon Railway Station		
Site		
Description and uses	An unkempt assortment of light industrial and small office buildings, overwhelmingly secondary in character and occupied by an assortment of automotive services.	
Quality and vacancy	Environment/public realm	Poor
	Building condition and age	Old 1950s-style sheds and other buildings
	Vacancy and under-utilisation	Site generally underutilised
	Dereliction	None obvious, but overall poor condition
Constraints	Access - car	Poor
	Access - van	Poor
	Access - HGV	No – rail bridge causing road narrowing
	Ecological issues	Run down. Close to River Blackwater
	Neighbourliness	Poor
Service and parking	Circulation	Poor
	Parking facilities	Adequate
	Loading bays	Not applicable
	Servicing	Poor
Access	Strategic road	Very
	Public transport	Adjacent to station
Potential	Residential incursion?	No
	High growth sectors?	No
Suitability for	Office	Poor
	Industrial	Poor
	Warehousing	Poor
	SMEs	Adequate
	Affordable space	Potentially
	Scope for intensification	High, but residential more likely
Recommendation	Unless a specialist developer can be attracted, most likely to feel pressure for residential development. Release or consider creating a planning brief for mixed-use redevelopment.	

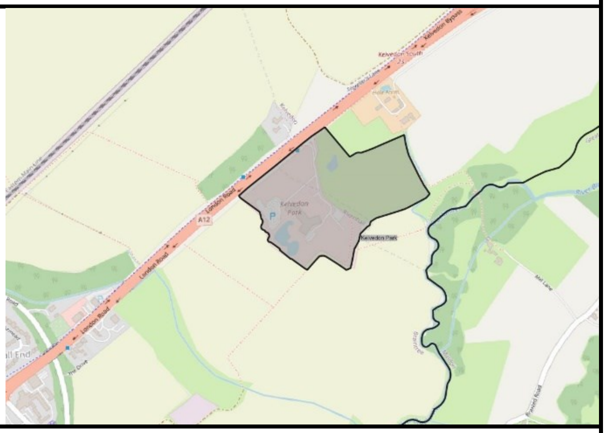
Site assessment: C26 Eastways, Witham		
Site		
Description and uses	A 41.3ha well-established industrial estate along Eastways and Crittall Road.	
Quality and vacancy	Environment/public realm	Average for a large industrial estate
	Building condition and age	Mixed – from c1950s to modern
	Vacancy and under-utilisation	Some vacancy – no evidence of underutilisation
	Dereliction	None
Constraints	Access - car	Excellent – A12
	Access - van	Excellent – A12
	Access - HGV	Excellent – A12
	Ecological issues	Possible asbestos
	Neighbourliness	Average, given its scale
Service and parking	Circulation	No issues
	Parking facilities	Above average given the mixed age of the site
	Loading bays	Good
	Servicing	Good
Access	Strategic road	Excellent – adjacent to A12 J22
	Public transport	Bus services, Witham railway station
Potential	Residential incursion?	Some
	High growth sectors?	No impediment
Suitability for	Office	Good
	Industrial	Excellent
	Warehousing	Excellent
	SMEs	Good
	Affordable space	Potentially
	Scope for intensification	Some. Extension more likely
Recommendation	Retain for employment use.	

Site assessment: C27 Freebournes, Witham		
Site		
Description and uses	A well-established 42.5ha industrial estates between Freebournes Road and Colchester Road containing- a wide variety of industrial and distribution uses.	
Quality and vacancy	Environment/public realm	Above average for the type of site
	Building condition and age	Good, with modernisation on going
	Vacancy and under-utilisation	Minimal
	Dereliction	None
Constraints	Access - car	Excellent – A12
	Access - van	Excellent – A12
	Access - HGV	Excellent – A12
	Ecological issues	Possible asbestos
	Neighbourliness	Average given the scale
Service and parking	Circulation	Very good
	Parking facilities	Good
	Loading bays	Excellent where needed
	Servicing	Good
Access	Strategic road	Excellent – adjacent to A12 J22
	Public transport	Busses, Witham railway station
Potential	Residential incursion?	None visible
	High growth sectors?	Potentially
Suitability for	Office	Good
	Industrial	Excellent
	Warehousing	Excellent
	SMEs	Yes
	Affordable space	Potentially
	Scope for intensification	Already well developed
Recommendation	Retain for employment use.	

Site assessment: C28 a/b Witham town centre		
Site		
Description and uses	Two large office buildings and associated parking in Witham town centre, one occupied by Aegon and another by Marsh Group.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	Good for their age – 1970s at latest
	Vacancy and under-utilisation	Hard to judge, but aerial photography suggests under-utilised car parking
	Dereliction	None
Constraints	Access - car	Good
	Access - van	Good
	Access - HGV	Not applicable
	Ecological issues	None
	Neighbourliness	Good
Service and parking	Circulation	Adequate
	Parking facilities	Excellent
	Loading bays	Not applicable
	Servicing	Seems good
Access	Strategic road	Very good – short drive to A12
	Public transport	Good – busses and Witham railway station
Potential	Residential incursion?	None
	High growth sectors?	No
Suitability for	Office	Excellent
	Industrial	Very poor
	Warehousing	Very poor
	SMEs	Potentially
	Affordable space	Potentially
	Scope for intensification	Not that is cost-efficient
Recommendation	Retain for employment use – no other large office buildings.	

Site assessment: C29 Lynderswood Farm, Black Notley		
Site		
Description and uses	A small business park on part of Lynderswood Farm, adjoining a related caravan storage facility.	
Quality and vacancy	Environment/public realm	Good
	Building condition and age	Fairly modern in vernacular style and well maintained
	Vacancy and under-utilisation	No obvious signs
	Dereliction	None
Constraints	Access - car	Adequate via minor roads
	Access - van	Adequate via minor roads
	Access - HGV	Not suitable
	Ecological issues	None evident
	Neighbourliness	Good
Service and parking	Circulation	Good
	Parking facilities	Good
	Loading bays	Adequate
	Servicing	Seems adequate
Access	Strategic road	A131 via minor roads
	Public transport	Too remote
Potential	Residential incursion?	No
	High growth sectors?	No
Suitability for	Office	Good
	Industrial	For light industry
	Warehousing	For small scale
	SMEs	Yes
	Affordable space	Potentially
	Scope for intensification	Maybe
Recommendation	Retain for employment use.	

Site assessment: C31 Horizon 120, Great Notley		
Site		
Description and uses	A new 18.5ha business park, mainly of B8 but including The Plaza Innovation Centre. Phase 2 is outline consented.	
Quality and vacancy	Environment/public realm	Outstanding
	Building condition and age	New – one building fire damaged
	Vacancy and under-utilisation	Undeveloped sites available
	Dereliction	None
Constraints	Access - car	Outstanding
	Access - van	Outstanding
	Access - HGV	Outstanding
	Ecological issues	None obvious
	Neighbourliness	Not applicable
Service and parking	Circulation	Outstanding
	Parking facilities	Outstanding
	Loading bays	Outstanding
	Servicing	Outstanding
Access	Strategic road	Excellent
	Public transport	Poor
Potential	Residential incursion?	No
	High growth sectors?	Yes
Suitability for	Office	Good
	Industrial	Very Good
	Warehousing	Excellent
	SMEs	At innovation centre
	Affordable space	Potentially
	Scope for intensification	Not applicable
Recommendation	Retain for employment use, extend boundary to Phase 2.	

Site assessment: Kelvedon Park, Rivenhall End		
Site		
Description and uses	HQ of Essex Couty Fire and Rescue service in self-contained business park setting.	
Quality and vacancy	Environment/public realm	Very good
	Building condition and age	Good
	Vacancy and under-utilisation	Unknown
	Dereliction	None evident
Constraints	Access - car	Good –westbound carriageway only
	Access - van	Good –westbound carriageway only
	Access - HGV	Nor applicable
	Ecological issues	None
	Neighbourliness	Not applicable
Service and parking	Circulation	No obvious issues
	Parking facilities	Plentiful on site
	Loading bays	Not applicable
	Servicing	No issues
Access	Strategic road	Direct to A12 westbound
	Public transport	Busses, but far from ideal
Potential	Residential incursion?	No (but may see allocations)
	High growth sectors?	Not applicable
Suitability for	Office	Good
	Industrial	Not applicable
	Warehousing	Not applicable
	SMEs	Not applicable
	Affordable space	Not applicable
	Scope for intensification	Possibly
Recommendation	Retain as Special Employment Area.	

Site assessment: C34 Maltings Lane/Gershwin Park Witham		
Site		
Description and uses	A group of development sites in the south west corner of Witham. A Mercedes truck service centre is on one site. Others awaiting development.	
Quality and vacancy	Environment/public realm	Undeveloped
	Building condition and age	Undeveloped
	Vacancy and under-utilisation	N/A
	Dereliction	N/A
Constraints	Access - car	Good –A12, but eastbound only
	Access - van	Good –A12, but eastbound only
	Access - HGV	Good –A12, but eastbound only
	Ecological issues	None
	Neighbourliness	N/A – schools nearby
Service and parking	Circulation	Unknown
	Parking facilities	Unknown
	Loading bays	N/A
	Servicing	N/A
Access	Strategic road	A12, eastbound
	Public transport	Busses – remote from railway
Potential	Residential incursion?	In a mixed use area
	High growth sectors?	Potentially
Suitability for	Office	Average
	Industrial	Average
	Warehousing	Very good
	SMEs	Potentially
	Affordable space	Potentially
	Scope for intensification	High
Recommendation	Retain for employment use. Explore options for finding more land south of the A12.	

7.0 Supply and demand forecasts

This Chapter sets out quantitative projections of demand for the previous B-class employment uses, now classes E(g)(i) Offices, E(g)(ii) Research & Development, E(g)(iii) Light industry and existing classes B2 and B8.

7.1 Method

Forecast demand for floorspace and land is derived from forecasts of employment change by sector. A sectoral forecast for Braintree District was commissioned from Cambridge Econometrics for the purposes of this project. [20] We then translate employment growth into floorspace requirements by applying job density ratios, drawing from HCA guidance, our own experience and taking into account the local economic structure. Recent years have seen significant changes in the way businesses occupy space and we undertake sensitivity tests around a central projection by varying the employment density ratios applied.

Projecting employment land and floorspace in this way takes account of the existing local economic structure of the District, the sectors that are projected to grow or decline nationally, and the relative past performance of Braintree District compared with these broader national trends.

Quantitative econometric projections are a top-down and mechanistic method. Whilst much local data is incorporated into these projections, they need to be sense checked against local intelligence on the Braintree economy. This is done through the data analysis and stakeholder consultations reviewed in earlier chapters. The sector forecast method of projecting demand for floorspace is also compared with analysis of past trends in floorspace stock and projecting forward of those trends.

Finally, we compare the forecast demand with the land and property supply identified in the appraisal of employment stock.

7.2 UK economic context

Economic prospects for Braintree are predominantly determined by the health of the UK economy. At time of writing this report the Office for Budget Responsibility (OBR) have just published their October 2024 Economic and Fiscal Outlook. This projects UK GDP growing by 2.0% in 2024, but falling back to 1.6% annual growth by 2029. Government spending is seen as giving an initial boost to GDP but the OBR see capacity constraints as limiting higher levels of growth in the medium term.

Growth rates since the 2008-09 recession have remained significantly lower than the averaged experienced over the preceding decades.

[20] Cambridge Econometrics April 2024 projection

Figure 7.1 Annual percentage change in real GDP, UK economy

Source: OBR

The medium-term forecast from the OBR is similar to the consensus of other forecasting institutions.

Figure 7.2 Forecasts for the UK economy

Forecast	2024	2025	2026	2027	2028	2029
OBR Real GDP	1.1%	2.0%	1.8%	1.5%	1.5%	1.6%
Independent Forecasts[21]	0.9%	1.5%	1.6%	1.7%	1.6%	
OBR Employment	-0.3%	0.9%	0.9%	0.6%	0.6%	0.6%

Source: OBR, HM Treasury

In the medium term the OBR project that this level of growth will result employment growing at an average of 0.6% p.a. The employment rate is expected to decline through the forecast period to just under 60 per cent, which is more than 1½ percentage points below its pre-pandemic peak. The OBR state this is driven mainly by higher inactivity. The OBR forecast that employment rises by around 200,000 a year on average between 2024 and 2029, owing to population growth.

7.3 Employment projections

The employment projections for Braintree District commissioned for this project cover the Local Plan period 2024-2041, and are produced for 12 employment sectors.

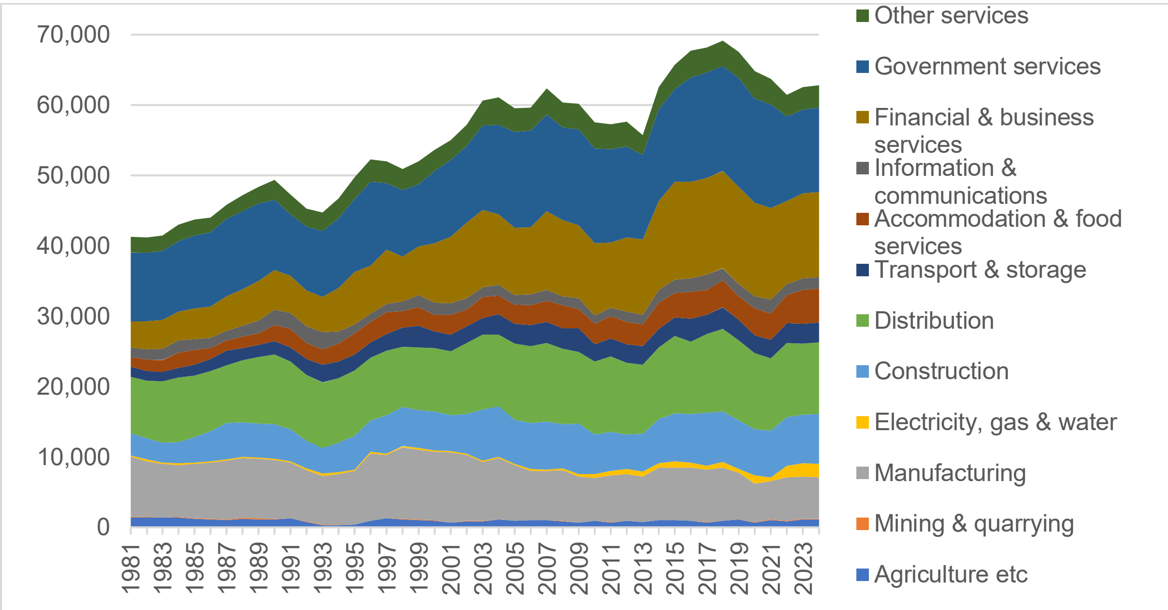
Over the period 2024-2041 employment in Braintree District is projected to increase by 6,000 jobs or 5.5%, growing from 62,800 to 68,800. This is an annual average rate of 0.5%. In the previous decade employment in Braintree had grown quite rapidly before falling back as covid and other factors impacted the economy.

[21] Forecasts for the UK economy: a comparison of independent forecasts – HM Treasury (August 2024). Dates of forecasts will vary.

Between 2011 and 2018, when employment peaked, it grew at an annual average of 2.7%, though part of this is explained by recovery from the previous recession. Peak to peak employment over the period 2007-18 grew at an annual average of 0.9%. Most sectors grew over this period with the largest growth in numbers coming from Financial and Business services, up 2,600 jobs, and Government services (which would include health and education) up 1,200 jobs.

Figure 7.3 illustrates long run employment change by sector for Braintree, highlighting both cyclical and structural patterns of growth.

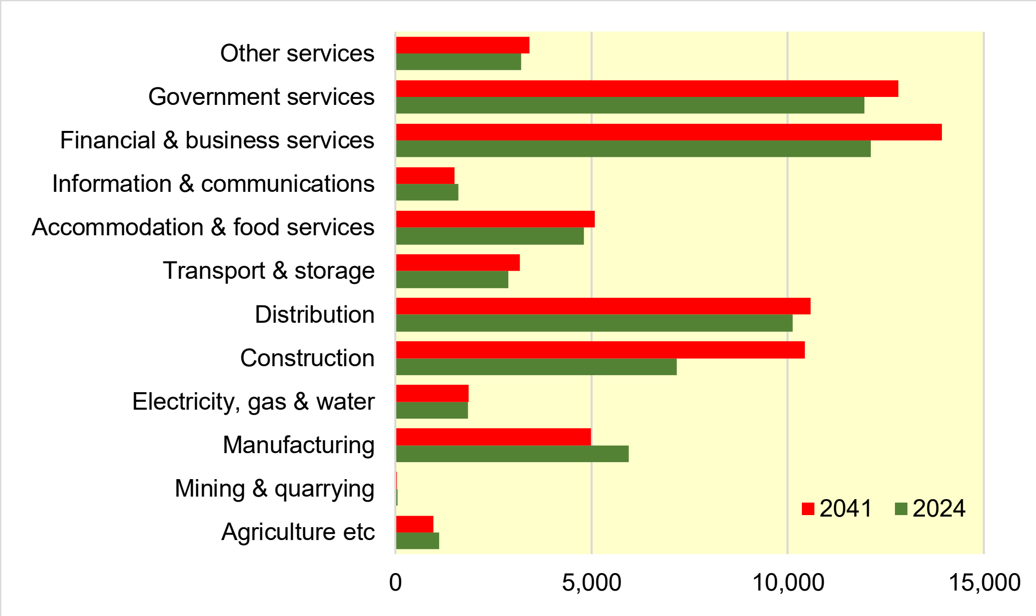
Figure 7.3 Employment by sector Braintree, 1983-2023



Source: Cambridge Econometrics

For the future period, 2024-41, the largest growth sectors are projected to be Construction, up by 3,300 jobs; Financial & Business Services, up by 1,800 jobs; followed by Government services, up by 900 jobs. Conversely manufacturing is projected to decline by nearly 1,000 jobs, whereas in the period 2007-18 it actually grew by 600 jobs. The projections by sector are shown in Figure 7.4.

Figure 7.4 Employment projections, number, Braintree District, 2024-2041



Source: Cambridge Econometrics

The Standard Industrial Classification (SIC) is a hierarchical classification of activities into sectors. At the most disaggregated activity level (5-digit SIC) we classify activities as to whether they are likely to occupy office or industrial floorspace – or neither. This provides a finer grained representation of the economic structure of the Braintree economy by use class type.

Applying this to the Cambridge Econometrics forecast by sector we project the future change in employment by office and industrial (manufacturing, warehousing and other) occupiers, over the period 2024 to 2041.

Figure 7.5 Jobs change by property type, 2024-2041[22]

Property Type	Jobs 2024	Jobs 2041	Jobs Change 2024-41
Manufacturing	5,950	4,980	-970
Other Industrial	5,730	7,600	1,880
Distribution	5,670	6,060	390
Total Industrial	**17,340**	**18,640**	**1,300**
Office	12,240	13,720	1,490

To this projected change in jobs, we then apply a standard employment density ratio. An oft cited source for employment density ratios is the HCA Guidance 3rd edition. [23] But this was published in 2015 and much has changed since then in terms of working practices and the way firms occupy space. The density ratios are also national averages which can vary by location. Hence we also apply sensitivity tests (below) around these central assumptions, as follows.

[22] Totals may not sum due to rounding
[23] Homes & Communities Agency (2015) *Employment Density Guide* 3rd Edition Nov 2015

- 36 sq m per worker for **manufacturing** taken from the HCA Guidance for B2.
- 50 sq m per worker for **other industrial.** These uses will be more dense than distribution but less dense than manufacturing and may not apply to all jobs.
- 77 sq m per worker for **distribution** taken from the HCA Guidance for Regional Distribution Centres.
- 11.3 sq m per worker for **offices** derived from the BCO Office Occupier survey. [24]

We have sense checked these by applying our employment definitions by property type to the VOA floorspace stock data. Using 2023 data the implied floorspace ratios for Braintree using our employment definitions are:

- 9.5 sq m per worker for offices.
- 52.6 sq m per worker for industrial. (VOA data does not disaggregate the industrial stock by type).

These are fairly close to the benchmark ratios suggested by the HCA Guidance and other sources.

Applying these central density assumptions, the projected change in jobs and employment density ratios are set out in Figure 7.6.

Figure 7.6 Jobs change by employment land use type, 2024-2041

Property type	Jobs change	Density ratio sq m per worker	Net additional floorspace	Plot ratio (sq m/ha)	Land (ha)
Manufacturing	-1,000	36	-36,000	4,000	-9.0
Other Industrial	1,900	50	95,000	4,000	23.8
Warehouse	400	77	30,800	4,000	7.7
Industrial sub total	**1,300**		**89,800**		**22.5**
Office	**1,500**	**11.3**	**16,950**	**7,000**	**2.4**
Total	**2,800**		**106,750**		**24.9**

In total this produces a projected increase in demand for industrial floorspace of 89,800 sq m and an increase in demand for office floorspace of 16,950 sq m.

To convert this into demand for land we have applied a standard plot ratio of 0.4 for industrial land, which generates demand for industrial land of 22.5ha. For offices we have applied a plot ratio of 0.7. This assumes a blend of business park

[24] British Council for Offices (2018) *Office Occupancy: Density and Utilisation*

premises which would have a plot ratio of 0.4 and town centre offices at an assumed plot ratio of 1. The demand for land for offices would total 2.4ha.

Demand for strategic distribution is not so well captured by this method. These are warehouses of typically more than 9,000 sq m (97,000 sq ft) that are serving as regional or national distribution centres. (Though there is increasing demand for ever larger units that require large sites). The search market for Strategic Distribution sites is typically wider than the functional market area for other activities as they are serving regional or national markets.

Sensitivity tests

We have applied some sensitivity testing around the central density and plot ratio assumptions. These assumptions are set out in Figure 7.7. The high-density assumption also assumes just 50% of jobs in the other industrial category are occupiers of industrial land.

These higher and lower density assumptions provide a range of between 7.0ha and 41.5ha of net additional employment land in total.

Figure 7.7 Sensitivity tests and density ratios

Density	Jobs change	Density ratio sq m per worker	Net additional floorspace	Plot ratio (sq m/ha)	Land (ha)
High Density					
Manufacturing	-1,000	30	-30,000	5,000	-6.0
Other Industrial	950	40	38,000	5,000	7.6
Warehouse	400	50	20,000	5,000	4.0
Industrial sub total	**350**		**28,000**		**5.6**
Office	**1,500**	**9**	**13,500**	**10,000**	**1.4**
Total	**1,850**		**41,500**		**7.0**
Low Density					
Manufacturing	-1,000	40	-40,000	3,000	-13.3
Other Industrial	1,900	60	114,000	3,000	38.0
Warehouse	400	90	36,000	3,000	12.0
Industrial sub total	**1,300**		**110,000**		**36.7**
Office	**1,500**	**13**	**19,500**	**4,000**	**4.9**
Total	**2,800**		**129,500**		**41.5**

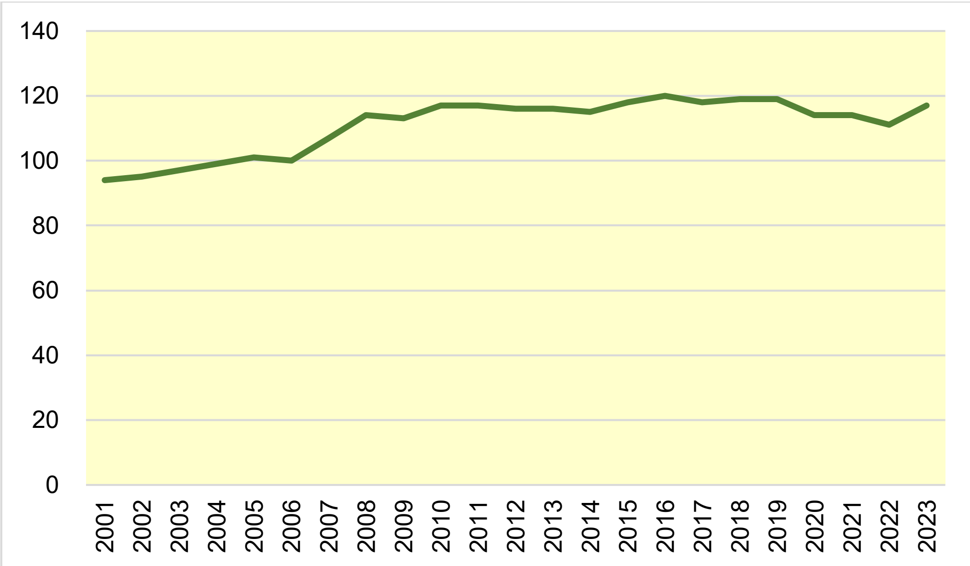
Source: CAG

Past trends in floorspace

An alternative projection is to apply the recent trend rate of change in floorspace to the future. Figure 7.8 shows the long run trend in office floorspace stock for Braintree. In 2023 office stock in Braintree was 117,000 sq m representing 9.4% of the Essex County total.[25]

Over the most recent ten-year period 2013-2023 office floorspace stock was relatively flat, increasing by an annual average of 100 sq m or 0.1%. If this same rate of change were applied for the Plan period 2024-41, it would imply an increase of between 1,400 and 1,700 sq m of floorspace depending on whether the annual rate or annual quantum is applied.

Figure 7.8 Office floorspace stock, Braintree, 2001-23 (000 sq m)

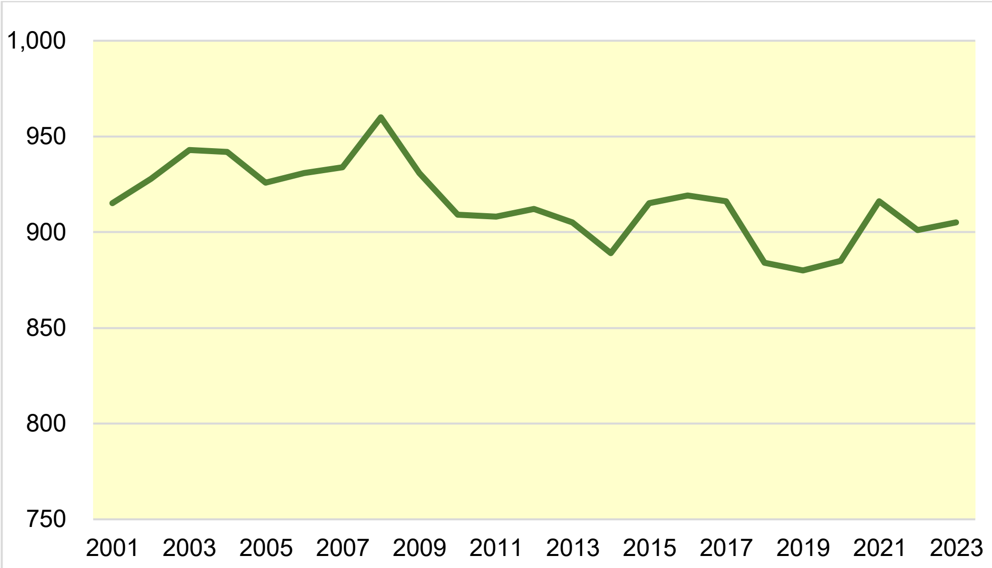


For industrial floorspace over the ten years 2013-2023 the net change in floorspace stock was zero. If this same trend were projected into the future it would imply no need for net additional industrial floorspace or land in Braintree. However, whilst the net change over this period was zero, floorspace stock levels fluctuated by significant amounts.

Industrial floorspace stock in Braintree peaked in 2008 at 960,000 sq m, falling to 889,000 sq m by 2014. Since when it has increased by 30,000 sq m, to 2016, fallen back by 39,000 sq m to 2019 before recovering to its current figure of 905,000 sq m. This seems to reflect older industrial land being disposed of for housing and being replaced by more modern industrial stock. Industrial stock in Braintree has over this period remained at just over 13% of the Essex total.

[25] This definition is the Essex County Council area excluding the unitary authorities of Southend and Thurrock

Figure 7.9 Industrial floorspace stock, Braintree, 2001-23 (000 sq m)



Labour supply

Over this same period 2024-41, the latest sub-national population projections[26] predict that the population of working age (16-64) in Braintree will decline by around 1,400. If economic activity rates remain constant then this implies a decline in the local resident workforce of approximately 1,100.

With jobs projected to increase by 6,000 this would mean a potential labour market shortage but one that could plausibly be filled by a reduction in out-commuting and some increase in activity rates amongst older workers. However, this requires that the jobs generated are sufficiently attractive to achieve that.

7.4 Summary: demand and supply balance

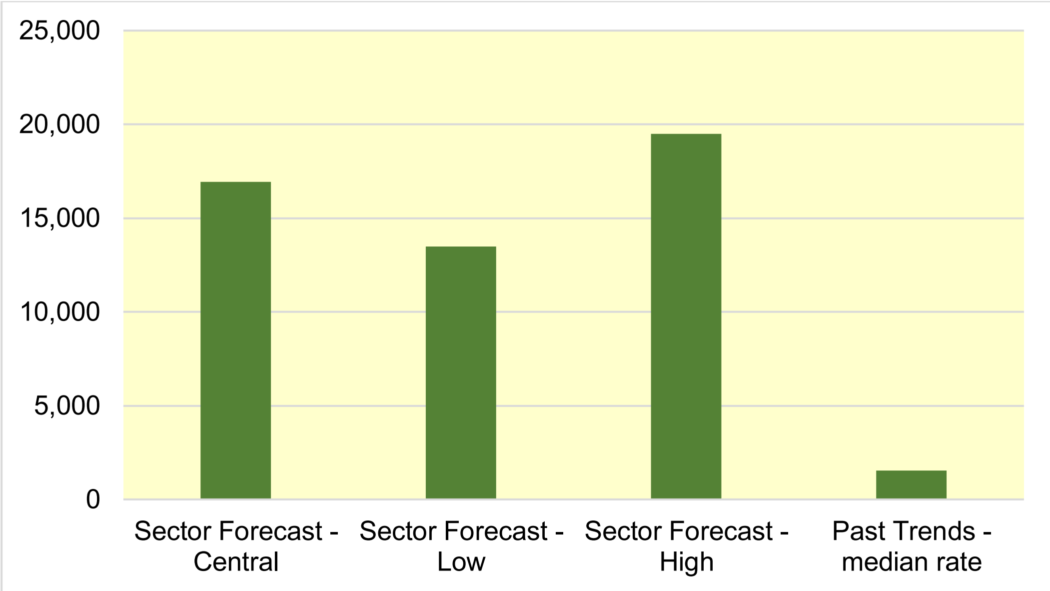
Demand

The two projection methods produce different results. For offices the sector-led demand projections show a modest positive additional demand for floorspace of 17,000 sq m (on the central assumptions) compared to just 1,000 sq m under the trend method. The floorspace projections resulting from the different methods are summarised in Figure 7.10.

Our recommendation for offices would be to plan for the higher figure, generated by the sector-led projection, of up to 17,000 sq m (1,000 sq m per annum), or 2.4ha of employment land. This represents just under 15% of current stock. But this provision should be made up of small units at different locations across the district. It should be targeted at the needs of SMEs, start-ups and others seeking local affordable premises. Part of this should be accommodated within rural business parks and part within town centre locations.

[26] 2020 revision. Original release 2018

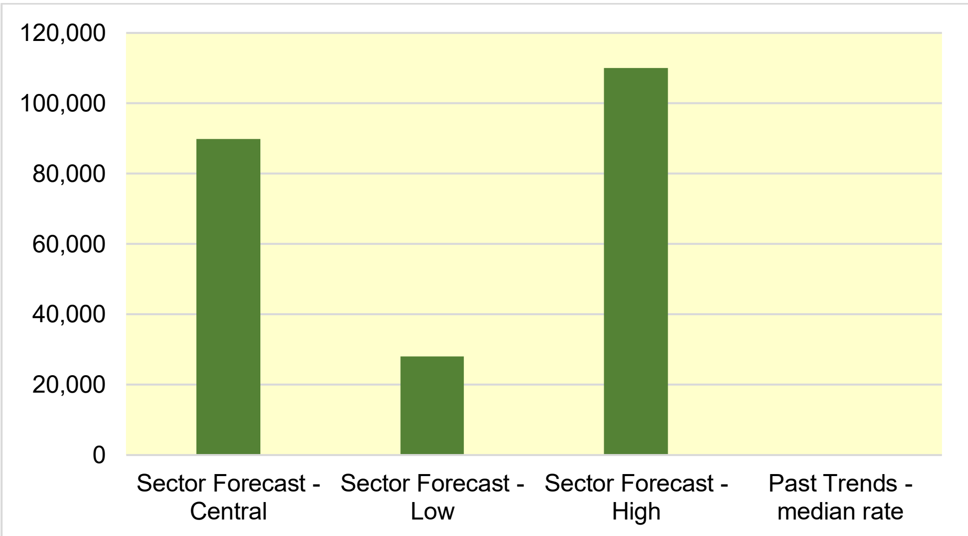
Figure 7.10 Net additional demand for office floorspace, 2024-41 (sq m)



Source: CAG

The pattern is similar for the industrial floorspace projections with the sector-led projections being for 90,000 sq m compared to zero under the trend projections (Figure 7.11). Again we would recommend planning for the sector-led projection of 90,000 sq m, or 22.5ha of industrial land, which seems to us more consistent with the demand profile identified in the earlier property market review. That represents 10% of current stock. But given the potential demand for strategic distribution this figure should not be seen as a ceiling if the right site is available and there is market demand to deliver the product.

Figure 7.11 Net additional demand for industrial floorspace, 2024-41 (sq m)



Source: CAG

Supply

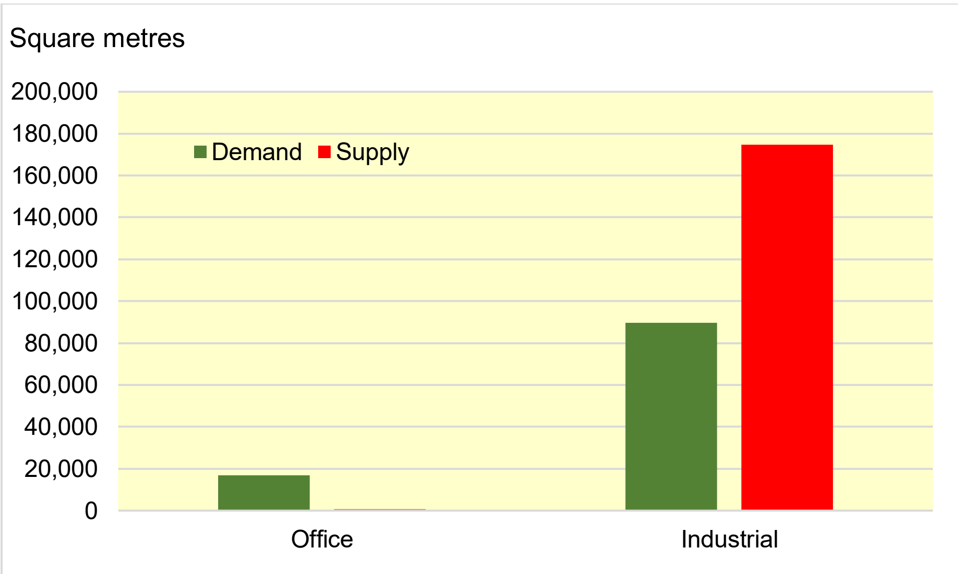
Analysis of planning data shows a total of 175,000 sq m of industrial floorspace with outstanding consents and anticipated to come forward between 2024-2026. Figure 7.12 summarises this by sub-area within the district. Braintree town accounts for 70% of this total with Witham accounting for 26%.

Figure 7.12 Industrial floorspace pipeline

Area	Square Metres
Braintree	121,487
Coggeshall	817
Earls Colne	0
Halstead	6,038
N of A131	0
Nr Colchester	192
Witham	46,082
Braintree District total	**174,616**

In terms of office development there is just 672 sq m in the pipeline which is located in Halsted. Figure 7.13 summarises the supply and demand balance. There is a shortfall in office supply, whilst the industrial pipeline is twice the forecast demand.

Figure 7.13 Supply and demand balance



Loss of stock

The forecasts for office and industrial land set out above are based on net change in demand for floorspace. They represent the quantum of land that would be needed if there were no loss in employment land or floorspace. The year-on-year changes in the industrial floorspace stock data illustrated in Figure 7.9 suggests there have been losses as well as gains.

To the extent that existing employment land is lost during the plan period then additional allocations may be needed to replace those losses. Therefore, any losses, including those via PDR need to be monitored in order to ensure the net change figure is met by increasing the gross stock figure where necessary. The fact that there is an apparent over-supply of industrial floorspace in the pipeline is not therefore cause for concern at this stage but is part of the buffer that may be needed.

Frictional vacancy

In normal market conditions there will always be an element of vacant land and premises to enable the market to function smoothly and allow for churn of businesses. This frictional level of vacancy is usually considered to be around 8%. Above this level there is excess vacancy which needs to be managed down. Below 8% the market is relatively tight. We do not have data on vacancy rates in Braintree, but observationally through our site visits and consultations with stakeholders there does not appear to be excess levels of vacancy. In the absence of any firmer evidence we have added 8% to the forecast demand for office and industrial requirements which produces a requirement of 18,300 sq m for offices and 97,000 sq m for industrial.

8.0 Main findings and recommendations

This ELR has been prepared between June and October 2024. The work has involved extensive fieldwork to understand how the District's current supply of commercial land and premises is operating; an assessment of the local economy and property markets; a detailed appraisal of planning and economic development reports and an evidence based forecast of future employment land requirements. In this final chapter we pull together the main findings from this work and present a series of recommendations to the Council.

The district of Braintree is comparatively small in economic terms. It is made up of three main towns - Braintree, Witham and Halstead – and six Key Service Villages (Coggeshall; Earls Colne; Hatfield Peverel; Kelvedon; Sible Hedingham; and Silver End). The district is strongly influenced, in economic and labour market terms, by the nearby towns of Chelmsford and Colchester, as well as Uttlesford district, which includes London Stansted. All of these influence travel-to-work patterns in Braintree as well as customer and supply chain relationships.

The economy is also influenced by the basic road infrastructure. East-west access is dominated by the A120 which connects Braintree with London Stansted and the Haven Ports; while to the south west, Chelmsford and Colchester are connected by the A12, next to which sits Witham. The relationship between these roads and the ports is critical in terms of influencing the demand for industrial and logistics property in the area.

This ELR has considered the future supply and demand of employment land and premises in the context of a wider Functional Economic Market Area which includes Chelmsford, Colchester and Uttlesford.

8.1 Main findings

Spatial planning

In July 2024, the General Election resulted in a change of Government. The new administration has stated its desire to overhaul the planning process, but it is too early to know what this means in detail. Draft revisions to the NPPF maintain the overall objectives of the previous version, but with a strong focus on increasing housing delivery.

The NPPF revisions call for more co-operation between local authorities; for policies to focus on economic growth, with planning policies identifying sites to meet emerging needs and growth. The revisions also state that planning policies should recognise and address the specific locational requirements of different sectors, including provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales.

In terms of regional planning, as from 1st April 2024 the activities of the South East LEP were transferred to the constituent local authorities. At the sub-regional level, the *Levelling Up Essex White Paper* (2021) identified Rural Braintree as one of six priority places for investment within Essex; while the *Essex Sector Development Strategy* (2022), identified five key growth sectors for Essex: construction, clean energy, advanced manufacturing & engineering, digital and life sciences.

Issues facing spatial planning The context of Local Plan making in 2024 is one of uncertainty and change. Economic, environmental, social and technological changes are all moving quickly and profoundly. In addition, a new Government, elected in July is promising fresh approaches to planning. Yet, an ELR must consider future requirements for land and buildings, using today's evidence to project tomorrow's needs. When the fundamentals of the economy and work are undergoing profound change, projections are fraught with difficulty.

- **Corporate offices** have evolved rapidly over recent years, and particularly since Covid. The changes have been largely in response to digital technology; but also to wider pressures. The role of the office is increasingly acknowledged as enabling people to interact and collaborate; it is expected to provide a wider range of settings in which individuals and groups work in more dynamic ways.

- **Hybrid working** is likely to become a permanent feature. Managing demand will become a key priority. Interior space will be managed to support hybrid working and to provide a quality 'experience' for when people are in the office, using activity-based settings. Offices will be *designed* to be attractive to staff. Better air quality, more focus on hygiene and health and wellbeing, and lower desk densities will be just some of the 'new normal'.

- **Town centres** The challenge is to maintain and improve the design quality of high streets, while reintroducing a wider range of uses. High streets will have to provide for work, including business centres, offices, light industry, studios and so forth.

- **Industrial premises** are increasingly occupied by firms who are product and service based; and such firms require higher specification, flexible space, often with office content. Indeed, many industrial premises today are occupied by non-industrial businesses, with much employment on designated sites of a non-industrial nature.

- **Logistics** The logistics market has grown spectacularly in recent years, both in terms of its overall size and in terms of the average size of units. This process can be clearly seen at Horizon 120 in Braintree. The large logistics facilities are often fully automated with high bay racking, sometimes in total darkness with only the whirring of environmental systems and robotic machines.

Socio-economic profile

Braintree district has a population of 155,700, up from 151,000 in 2015. The population has grown more slowly than the wider East region and slightly faster than the national rise. The district is predominantly rural in character with tight concentrations of economic activity in three towns.

- Braintree town is home to around 40,000 people and c15,000 jobs, more than a quarter of all employment in the district. The town is home to the Braintree Village designer outlet. It also hosts several industrial estates, including Springwood, Park Drive and Broomhills. Employment has fallen over recent years.

- Witham is the second largest settlement, with around 25,000 residents. It benefits from good connectivity via the A12 and Great Eastern Main Line (providing connections to London, Chelmsford, Colchester and Ipswich). The town centre has two shopping centres: Newlands and the Grove Centre. The town has a large industrial area to the North-East of the town, adjacent to the A12.

- Halstead is the smallest of the three towns, home c12,000 residents and c4,000 jobs. The A131 runs through the town centre, and the large Bluebridge Industrial Estate lies to the east of the town.

Of all residents in employment, around third also work in the district, meaning that the majority of residents travel to other areas to work. One cause of this might be commuting to areas/jobs where earnings are higher than locally; another might be the relatively low number of jobs available.

The Braintree district economy produced almost £3.6bn of output in 2021, compared to the much larger Chelmsford (£5.6bn) and Colchester (£4.7bn). In terms of jobs, Braintree provides 54,000 employee jobs, while Chelmsford and Colchester have 89,000 and 84,000, respectively. In terms of sectors, the largest by far is Wholesale & Retail, with 10,000 jobs. Manufacturing is the second largest sector (6,000 jobs), reflecting the high density of industrial stock in the district. The office market – as represented by Financial & Insurance and Professional, Scientific & Technical, has a combined workforce of just 5,000 jobs.

The economy comprises an overwhelmingly small (and even micro) business economy. However, growth has been sluggish in recent years. This situation is reflective of the fact that employment rates are high, unemployment is low and working age population has shrunk (from c80-85,000 in 2017-18 to c73,000 in 2024).

There are a number of potential drivers of economic growth in the area. These include physical infrastructure improvements to the A12 and the A120; the growth of the Freeport (Felixstowe and Harwich); the Cell and Gene Therapy Manufacturing Innovation Centre, the I-Construct Business Innovation Hub and planned expansion at London Stansted.

The proposed improvements offered by the A120 Braintree to A12 scheme are likely to be especially important. This should open further opportunities particularly given the district's relationship to the East Coast Ports (and Freeport East), Stansted Airport and beyond. It should also facilitate stronger links with Colchester (including, potentially, with the University of Essex).

Braintree district has many benefits: it offers a good quality of life in a largely rural area; it has largely vibrant local town centres and is very accessible. And yet it has shown only limited growth. There is a large outflow in terms of people travelling to jobs elsewhere and economic growth has been sluggish. Creating 'home grown' growth will be important to attracting and retaining employment opportunities.

The recent establishment of the I-Construct, and Cell and Gene Therapy Catapult and Innovation Centre should be part of this alongside Horizon 120. Such new investment can underpin a more positive perception among footloose companies as well as among those looking to grow.

There are no immediate challenges in terms of land and property shortages or a build-up of pressure to build new space. So there is no need for urgent policy actions to release new land. However, the district itself and the surrounding areas are expected to deliver significant housing growth in the years ahead, so it will be important to plan for modest growth, by creating and managing capacity, while protecting and enhancing existing physical assets.

Commercial property market

There is no escaping the fact that the commercial property market in Braintree is small in national terms, with very few of the large logistics sheds seen along much of the A14 and in places like Milton Keynes, and overwhelming focused on industrial and distribution. The general view in the market is that most demand is for B8 use and that this should be prioritised in policy and development control terms. There is very little property available and even less in the pipeline, at least in the short-term. The office market is negligible, with agents noting that it has moved almost entirely to serviced office provision, some suggesting that even that may be at capacity.

If the district is to enhance its commercial property offer, it needs to identify some larger sites that may be attractive to inward investors. Both Skyline 120 and Horizon give clear evidence that with a good site, and with good access, development can be a success, even in the wake of the pandemic and economic crisis. That these schemes are largely driven by distribution and industrial, rather than offices is not surprising given the lack of critical mass for an office market.

It would help the market greatly if some larger sites with good access could be designated, as would encouraging upgrades to existing sites, either via refurbishment or redevelopment and intensification. Extra planning policy attention could usefully be given to improving the supply of smaller units, purpose built with both start-ups and established SMEs in mind. One potential source of this is farm diversification.

Designated employment land

Overall, Braintree's designated employment land is, with very few exceptions, in good condition, well maintained and well occupied. Many sites show signs of active management to ensure stock is upgraded or redeveloped where appropriate. Our survey work revealed little congestion caused by on-street parking. Modern preferences are for private parking, rather than shared parking, on industrial estates and this should be considered when planning briefs are compiled.

The biggest issue is that, by national standards, sites in Braintree District are quite small and thus unlikely to appeal to a wide range of inward investors. There are a couple of proposed sites that could be added to the mix to allow longer term planning for inward investors.

Revisions to designations The district is projected to see a modest net growth in demand for employment land over the new Local Plan period, both in terms of office space and industrial space. This broadly points to the need to retain existing provision. However our site survey found that not all clusters were performing well.

Rec #1 Revisions to designated land There are a small number of employment sites that our survey has shown to be in decline and increasingly less suitable as industrial locations. We recommend they be de-designated or be re-drawn as follows.

Employment site	Recommendation
Hunnable Industrial estate	De-designate.
Factory Lane West, Halstead	Redraw to encompass adjacent employment uses.
Riverside, Earls Colne	Redraw to encompass adjacent employment uses.
Atlas Works Earls Colne	Designate Employment (previously omitted)
Priors Way Coggeshall	Redraw to reflect on-the-ground reality. Excluding residential.
Whitehouse Business Park, Halstead	Designate Employment (identified as part of this study)
Former Premdor Site and Rippers Yard, Sible Hedingham	Merge.
Gosfield Airfield	Redraw to encompass adjacent employment uses (Note: this is irrespective of the call for sites assessment.
Kelvedon Railway Station	De-designate.
London Road, Kelvedon	Redraw to include entire site.
Brookhill Park, Earls Colne	Redesignate Employment from 'Business Park'.

The net change to designated land from the amendments delivers a net gain of 1.27ha. This would be a net loss of 0.83ha without the new designation of Whitehouse Business Park.

It should be noted that the MWPA states that caution is required regarding the potential impact of de-designating, intensifying and regenerating sites/clusters to provide higher value uses, particularly with regards to the impact upon those lower value, space intensive uses which are still required to implement sustainable development. This is a reasonable point.

Only two sites are recommended for de-designation, the others being recommendations of re-drawing to consolidate contiguous areas, reflecting on-the-ground changes and addressing mapping anomalies.

Kelvedon Railway station, while providing a home for low value uses, is notably underused give its proximity to the station. We do, however, recommend that a planning brief be drawn up, and it is always good practice to include affordable space, especially for start-ups. Hunnable Industrial Estate is semi-derelict and, while existing users may remain on site, there is insufficient weight of use to justify retaining designation.

8.2 Recommendations: office property

Braintree district's office market is comparatively small and almost entirely comprised of small units. There are very few examples of large, corporate offices. Most office space is concentrated in Braintree, Witham and Halstead, with some notable examples of ‘rural offices’, including those at Threshelfords and Steeple Bumpstead. There are few signs of new investment in offices, and the stock generally is ageing. However vacancy levels appear to be low and demand for small premises is strong.

Braintree could potentially benefit from overspill demand from more expensive markets including Chelmsford and Colchester, and even Cambridge. The last of these is least likely, given the comparative images of the two markets, but it should not be discounted altogether.

Demand for space is dominated by small- and medium-sized professional services firms including accountants, designers, financial advisors, IT consultants, management consultants and real estate consultants. New supply should focus on the needs of such firms.

Our forecast has shown a requirement for up to an additional 18,300 sq m of office space over the period 2024-2041, including an allowance for a frictional vacancy rate of 8%. Taking account of the existing supply pipeline, this gives a net requirement of 17,600. This is a relatively modest profile of growth (15% over 17 years) and is aimed at providing for a relatively low level, but steady rate of growth in demand.

Rec #1 Encourage mixed use in town centres Demand for office space is in town centres (with some supplementary demand for rural barn conversions). Planning should seek to direct new provision, where possible, on locations in town centres which provide access to public transport and amenities. The Council should also look to accommodate ancillary office provision on new mixed use development proposals, including on new settlements where feasible.

The Council could work proactively with owners to encourage them to refurbish office buildings to energy efficiency standards. There are a number of government grant and loan schemes and the Council might also set up own form of assistance. The Council might also consider the development of an Action Area Plan for the main town centres with a focus on nurturing mixed use, including employment space.

Rec #2 Seek to retain existing office stock Given the changes in the economy described in this report, and in light of the recent dynamics of the office markets evidenced here, we recommend that policies should seek to retain office space in key centres (particularly Braintree, Halstead and Witham) where amenities, services and access are greatest, and on existing sites allocated under Policy LPP6 Business Parks, which typically exhibit low vacancy rates, good quality stock and a complementary business community.

This recommendation will be constrained by the general quality of existing stock (in terms of its potential for refurbishment) and by the demands of Minimum Energy Efficient Standards. From April 2023 it became unlawful to lease or sell office premises with an EPC rating of E or below. This minimum requirement will be lifted to C by 2027 and to B by 2030. Given that buildings falling outside the minimum requirements can be neither leased nor sold, the overall impact is a rise in obsolescence in the built stock.

Rec #3 New supply of office space In addition to seeking to retain space, and in line with our forecasts, we also recommend that the Council seeks to promote limited new space, particularly stock aimed at SMEs in town centres, on the edges of town centres, on established business clusters, and rural diversification areas. Such space should seek to provide a mix of unit sizes including the provision of small units to meet demand from the majority of local businesses which are small, as well as start-ups and established micro-businesses. It should be suitable for conventional office uses and modern quasi-light industrial uses such as 3D printing and even small maker spaces. There is no evidence of demand for corporate offices.

The Council could also seek to engage with the operators of the Cell & Gene Therapy MIC to understand what space might be required to help build a nascent life science cluster.

Rec #4 Designated sites The District has allocated a number of strategic regeneration sites and mixed-use locations that are well positioned to capture additional demand. Many of these are located adjacent or in proximity to competing centres, providing opportunities for growth in the small business sector through expanding the provision of small office stock, as well as providing land on which existing medium to large-sized occupiers can grow. These sites also provide an opportunity to attract inward investment through capturing businesses moving out of more expensive and space-constrained areas, such as Chelmsford and London. The key issue for such occupiers is access; location in proximity to the strategic road network is a strong factor in determining the location of demand.

This recommendation is in line with the recent revisions to the NPPF in terms of targeting sector growth , the NEEB’s ambition to attract inward investment and the District’s Corporate Strategy in terms of attracting and supporting business growth, providing high quality employment opportunities in high growth sectors and industries.

Rec #5 Encourage flexible space at new mixed-use schemes on strategic growth locations Recognising changing workstyles, the Council should encourage flexible space operators to provide space aimed at SMEs and to act as incubators for start-up businesses. In mixed-use schemes it is recommended to bring a specialist flexible space operator on board as a planning requirement. This is especially important in mixed-use schemes, given that housebuilders have no expertise to make such space a success. The Plaza at Horizon 120 shows how effectively such space can be used, but it does require a dedicated team.

Rec #6 Continue to support rural workspaces There is likely to be further growth in demand for rural workspaces, particularly where opportunities arise to convert redundant agricultural holdings to commercial uses. Subject to environmental and access considerations, we recommend that policies (such as LPP7) continue to encourage such development.

8.3 Recommendations: industrial property

Braintree has a large stock of industrial property, the majority of which is located on three large industrial areas: Springwood Industrial Estate in Braintree, the Bluebridge Industrial Estate in Halstead and the Witham Industrial Estates. These sites provide large reservoirs of property of different sizes, specifications and ages, as well as diverse employment opportunities. Vacancy levels are very low, and there is evidence of new investment, both of which suggest positive levels of demand.

In addition to the large concentrated sites there are also a number of scattered sites in more rural areas (such as Gosfield Airfield and Earls Colne Airfield). These also provide important stock of premises and employment opportunities, as well as opportunities for siting less neighbourly uses. The range of activities undertaken on the industrial estates is extremely wide, from heavy manufacturing and engineering, to distribution, to light industrial, to service-based businesses.

Our forecast has shown a requirement for a minimum of an additional 97,000 sq m of industrial space over the period 2024-2041, including an allowance for frictional vacancy. That is equivalent to 24.2ha of land at a standard plot ratio of 0.4. At present the supply pipeline exceeds this, though there is no guarantee this will all come forward and future industrial land losses also need to be monitored. The requirement is for a net addition to floorspace stock of 97,000 sq m and any losses of industrial land need to be added back to this total.

The requirements for industrial land are primarily aimed at providing for a rapidly changing logistics sector and the figure of 97,000 sq m, or 24.2ha of land, should not be seen as a ceiling where there is viable market demand.

Rec #7 Undertake an appraisal of the logistics potential Although there is a net additional requirement for industrial land, the changing nature of demand may have implications for the location of provision. The extent to which logistics occupiers can move into locations left vacant by a contraction of manufacturing demand is conditioned by the needs of modern occupiers. Within the large quantity of smaller clusters of poorer quality workshop/warehouse space in the district, the interchangeability between manufacturing and warehouse uses implies this may be the case.

However, whereas the current stock of manufacturing units is often found in secondary locations, larger occupiers tend to require higher grade units at key access points. The provision of new, purpose-built stock at locations along good lines of transport may be necessary in order to grow and attract logistics businesses. As a consequence, in order to rebalance demand and ensure there is not an over-designation of employment land, a contraction of the older stock in less well-performing traditional industrial estates may be required.

The District should look to position itself in the best way possible to maximise its share of additional demand for industrial occupancy across the PMA. It could to this by undertaking an appraisal of the nature of demand and the district's potential to accommodate a proportion.

Rec #8 Retaining industrial stock In terms of existing stock, the main clusters of industrial activity appear to be strong and have critical mass, alongside a wide variety of uses. We recommend that spatial policies seek to retain the vitality of the large clusters by protecting their uses.

The Council should also seek to retain the smaller clusters of industrial property scattered across the District. Examples include those at Riverside at Earls Colne and Priors way in Coggeshall. Encroachment by residential uses should be resisted. A small number of sites have already been compromised and should be de-designated.

Rec #9 Providing for new industrial land While it will be important to retain existing industrial stock (and to encourage replacement of older stock with new), there will also be a demand for new industrial property. As a first step, the Council should therefore promote and encourage growth of industrial sites by expanding onto adjacent land, while respecting neighbouring uses such as residential. The places where this can realistically happen are: Bluebridge Industrial Estate; Eastways; Gosfield Airfield; Horizon 120; Lynderswood Farm; Springwood Drive.

Given the changes in the economy described in this report, and in light of the recent dynamics of the industrial and logistics markets evidenced here, we recommend that policies should seek to promote new space, particularly on allocated land where there is least conflict with other uses. Recent experience at Horizon 120 has shown the strong demand for modern industrial buildings.

One aspect of growing demand is the logistics sector. Logistics operators obviously require large, clear sites with plentiful circulation and loading facilities. In this sense, infill sites on existing industrial estate can be inadequate.

We recommend that the Council seeks to provide for demand from the distribution and logistics sector both on suitable existing industrial estates and on newly allocated land where access to trunk roads is excellent. The recent 'Call for Sites' has produced a number of sites with capacity for industrial and logistics activities. We recommend that some of these sites are promoted for such use.

8.4 Recommendations: other uses

Rec #10 Non-industrial uses in industrial areas Uses such as gyms, children's play spaces and exercise studios should only be permitted on employment land with proper conditions in place, such that visitors are fully aware of, and are required to take heed of, the safe operation of industrial areas and do not conflict with industrial uses, especially the safe movement of vans, trucks and other mobile industrial equipment.

Rec #11 NPPF requirement for 'appropriate sites' In order to address the requirement of the Draft NPPF, for LPAs to identify *"appropriate sites"* for needs of the modern economy including "*laboratories, gigafactories, data centres, digital infrastructure, freight and logistics*", we recommend that further work should make a more detailed assessment of the suitability of the District's strategic sites for these specific uses.

Rec #12 Adopt practical planning approach to farm diversification We observed some locations where farm diversification has created small, but apparently effective, business communities. Policy LPP7 should be supported with an approach that focuses on practical issues – eg what is needed to make this work – rather than policies that might risk micromanaging what is acceptable.

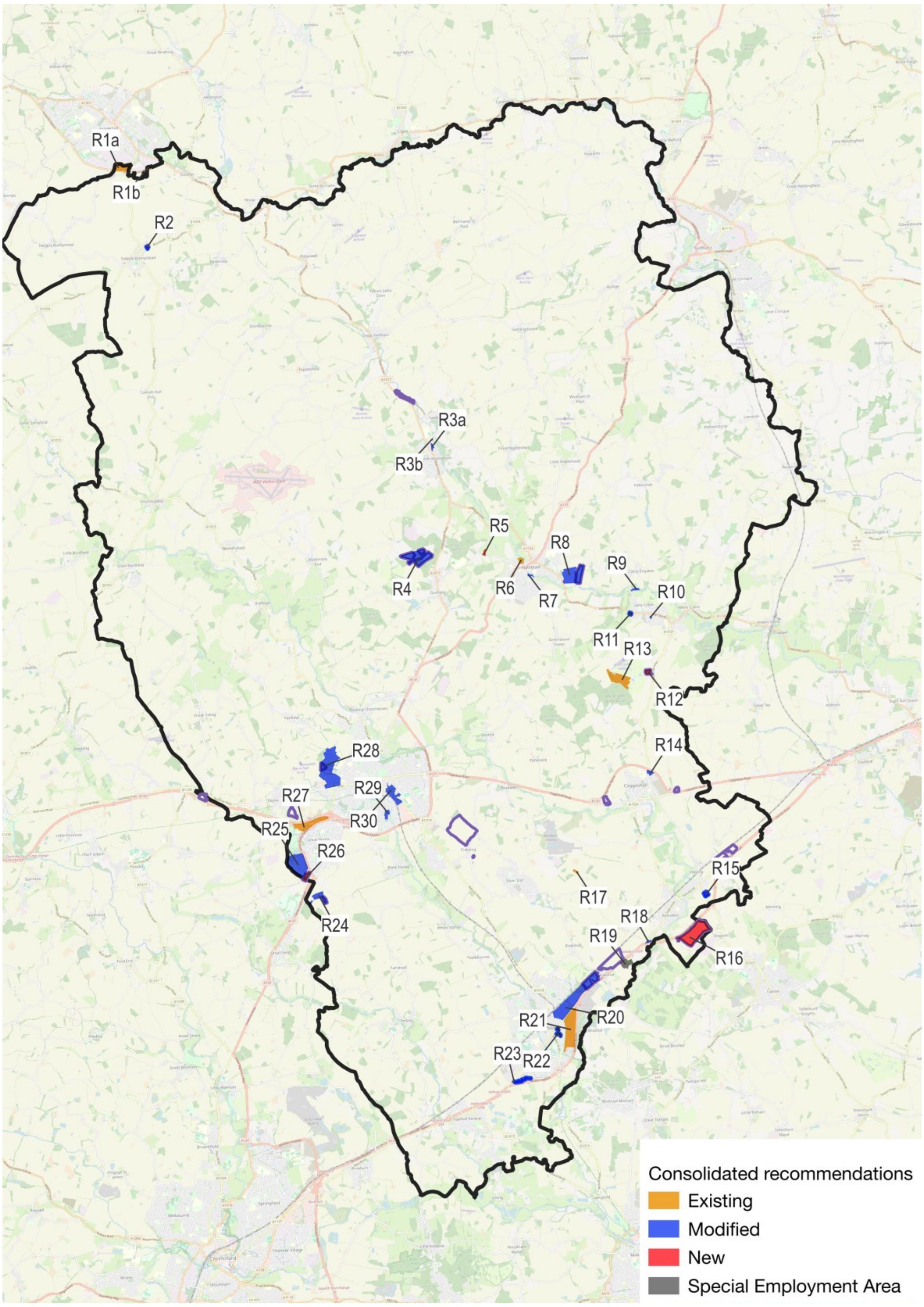
Rec #13 Monitoring The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the plan period to 2044. It is important that appropriate and sufficient monitoring mechanisms are embedded within the plan making process in order to record the change in employment land available for economic growth.

The aim of the monitoring of employment land is to ensure that overall an approximate quantum of appropriate employment land supply is retained in the District to meet the level of projected demand indicated in this study. It should inform the Council on where too little land or premises is being provided or too much is being provided.

Appendix One: Consolidated site recommendation list

Name	Settlement	Ref number	Area (ha)	Type
Phoenix Road	Haverhill	R1a	11.4	Existing
Haverhill	Haverhill	R1b	0.8	Existing
Bloise Meadows	Steeple Bumpstead	R2	1.1	Modified
Rippers Court	Sible Hedingham	R3a	1.9	Modified
Everitt Way	Sible Hedingham	R3b	0.3	Existing
Gosfield Airfield	Gosfield	R4	34.5	Modified
White House Business Park	Halstead	R5	2.1	New
Broton Road	Halstead	R6	3.9	Existing
Factory Lane West	Halstead	R7	1.6	Modified
Bluebridge Industrial Estate	Halstead	R8	34.8	Modified
Riverside Business Park	Earls Colne	R9	2.1	Modified
Atlas Works	Earls Colne	R10	0.7	Modified
Brookhill Park	Earls Colne	R11	1.1	Existing
Hanger Field	Earls Colne	R12	3.0	New
Earls Colne Airfield	Earls Colne	R13	24.9	Existing
Priors Way	Coggeshall	R14	3.0	Modified
Threshelfords Business Park	Feering	R15	2.6	Modified
Land South of the A12	Kelvedon	R16	43.3	New
Allshots	Kelvedon	R17	1.7	Existing
London Road	Kelvedon	R18	1.8	Modified
Kelvedon Park	Kelvedon	R19	8.9	SEA
Eastways extended	Witham	R20	63.9	Modified
Freebournes	Witham	R21	44.7	Existing
Witham Town Centre	Witham	R22	2.6	Existing
Gershwin Boulevard	Witham	R23	6.0	Modified
Lynderswood Farm	Black Notley	R24	11.0	Modified
Horizon 120	Great Notley	R25	41.0	Modified
Slamseys Farm	Great Notley	R26	4.0	New
Skyline 120	Great Notley	R27	21.5	Existing
Springwood Drive Industrial Area	Braintree	R28	65.0	Modified
Driberg Way	Braintree	R29	4.3	Modified
Braintree Town Centre	Braintree	R30	17.6	Modified
Total			**467.0**	

Appendix Two: Map of site recommendations



Appendix Three: Five-digit SIC aggregation

Manufacturing

10110 : Processing and preserving of meat
10120 : Processing and preserving of poultry meat
10130 : Production of meat and poultry meat products
10200 : Processing and preserving of fish, crustaceans and molluscs
10310 : Processing and preserving of potatoes
10320 : Manufacture of fruit and vegetable juice
10390 : Other processing and preserving of fruit and vegetables
10410 : Manufacture of oils and fats
10420 : Manufacture of margarine and similar edible fats
10511 : Liquid milk and cream production
10512 : Butter and cheese production
10519 : Manufacture of milk products (other than liquid milk and cream, butter, cheese) n.e.c.
10520 : Manufacture of ice cream
10611 : Grain milling
10612 : Manufacture of breakfast cereals and cereals-based foods
10620 : Manufacture of starches and starch products
10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes
10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products
10810 : Manufacture of sugar
10821 : Manufacture of cocoa, and chocolate confectionery
10822 : Manufacture of sugar confectionery
10831 : Tea processing
10832 : Production of coffee and coffee substitutes
10840 : Manufacture of condiments and seasonings
10850 : Manufacture of prepared meals and dishes
10860 : Manufacture of homogenised food preparations and dietetic food
10890 : Manufacture of other food products n.e.c.
10910 : Manufacture of prepared feeds for farm animals
10920 : Manufacture of prepared pet foods
11010 : Distilling, rectifying and blending of spirits
11020 : Manufacture of wine from grape
11030 : Manufacture of cider and other fruit wines
11040 : Manufacture of other non-distilled fermented beverages
11050 : Manufacture of beer
11060 : Manufacture of malt
11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters
12000 : Manufacture of tobacco products
13100 : Preparation and spinning of textile fibres
13200 : Weaving of textiles
13300 : Finishing of textiles
13910 : Manufacture of knitted and crocheted fabrics
13921 : Manufacture of soft furnishings

13922 : Manufacture of canvas goods, sacks etc
13923 : Manufacture of household textiles (other than soft furnishings of 13921)
13931 : Manufacture of woven or tufted carpets and rugs
13939 : Manufacture of carpets and rugs (other than woven or tufted) n.e.c.
13940 : Manufacture of cordage, rope, twine and netting
13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel
13960 : Manufacture of other technical and industrial textiles
13990 : Manufacture of other textiles n.e.c.
14110 : Manufacture of leather clothes
14120 : Manufacture of workwear
14131 : Manufacture of men's outerwear, other than leather clothes and workwear
14132 : Manufacture of women's outerwear, other than leather clothes and workwear
14141 : Manufacture of men's underwear
14142 : Manufacture of women's underwear
14190 : Manufacture of other wearing apparel and accessories
14200 : Manufacture of articles of fur
14310 : Manufacture of knitted and crocheted hosiery
14390 : Manufacture of other knitted and crocheted apparel
15110 : Tanning and dressing of leather; dressing and dyeing of fur
15120 : Manufacture of luggage, handbags and the like, saddlery and harness
15200 : Manufacture of footwear
16100 : Sawmilling and planning of wood
16210 : Manufacture of veneer sheets and wood-based panels
16220 : Manufacture of assembled parquet floors
16230 : Manufacture of other builders' carpentry and joinery
16240 : Manufacture of wooden containers
16290 : Manufacture of other products of wood; manufacture of articles of cork, etc
17110 : Manufacture of pulp
17120 : Manufacture of paper and paperboard
17211 : Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper
17219 : Manufacture of paper and paperboard containers other than sacks and bags
17220 : Manufacture of household and sanitary goods and of toilet requisites
17230 : Manufacture of paper stationery
17240 : Manufacture of wallpaper
17290 : Manufacture of other articles of paper and paperboard
18110 : Printing of newspapers
18121 : Manufacture of printed labels
18129 : Printing (other than printing of newspapers and printing on labels and tags) n.e.c.
18130 : Pre-press and pre-media services
18140 : Binding and related services
18201 : Reproduction of sound recording
18202 : Reproduction of video recording
18203 : Reproduction of computer media
19100 : Manufacture of coke oven products
19201 : Mineral oil refining
19209 : Other treatment of petroleum products (excl mineral oil refining petrochem manufacture)
20110 : Manufacture of industrial gases
20120 : Manufacture of dyes and pigments

20130 : Manufacture of other inorganic basic chemicals
20140 : Manufacture of other organic basic chemicals
20150 : Manufacture of fertilisers and nitrogen compounds
20160 : Manufacture of plastics in primary forms
20170 : Manufacture of synthetic rubber in primary forms
20200 : Manufacture of pesticides and other agrochemical products
20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants
20302 : Manufacture of printing ink
20411 : Manufacture of soap and detergents
20412 : Manufacture of cleaning and polishing preparations
20420 : Manufacture of perfumes and toilet preparations
20510 : Manufacture of explosives
20520 : Manufacture of glues
20530 : Manufacture of essential oils
20590 : Manufacture of other chemical products nec
20600 : Manufacture of man-made fibres
21100 : Manufacture of basic pharmaceutical products
21200 : Manufacture of pharmaceutical preparations
22110 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
22190 : Manufacture of other rubber products
22210 : Manufacture of plastic plates, sheets, tubes and profiles
22220 : Manufacture of plastic packing goods
22230 : Manufacture of builders ware of plastic
22290 : Manufacture of other plastic products
23110 : Manufacture of flat glass
23120 : Shaping and processing of flat glass
23130 : Manufacture of hollow glass
23140 : Manufacture of glass fibres
23190 : Manufacture and processing of other glass, including technical glassware
23200 : Manufacture of refractory products
23310 : Manufacture of ceramic tiles and flags
23320 : Manufacture of bricks, tiles and construction products, in baked clay
23410 : Manufacture of ceramic household and ornamental articles
23420 : Manufacture of ceramic sanitary fixtures
23430 : Manufacture of ceramic insulators and insulating fittings
23440 : Manufacture of other technical ceramic products
23490 : Manufacture of other ceramic products
23510 : Manufacture of cement
23520 : Manufacture of lime and plaster
23610 : Manufacture of concrete products for construction purposes
23620 : Manufacture of plaster products for construction purposes
23630 : Manufacture of ready-mixed concrete
23640 : Manufacture of mortars
23650 : Manufacture of fibre cement
23690 : Manufacture of other articles of concrete, plaster and cement
23700 : Cutting, shaping and finishing of stone
23910 : Production of abrasive products
23990 : Manufacture of other non-metallic mineral products n.e.c.

24100 : Manufacture of basic iron and steel and of ferro-alloys
24200 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
24310 : Cold drawing of bars
24320 : Cold rolling of narrow strip
24330 : Cold forming or folding
24340 : Cold drawing of wire
24410 : Precious metals production
24420 : Aluminium production
24430 : Lead, zinc and tin production
24440 : Copper production
24450 : Other non-ferrous metal production
24460 : Processing of nuclear fuel
24510 : Casting of iron
24520 : Casting of steel
24530 : Casting of light metals
24540 : Casting of other non-ferrous metals
25110 : Manufacture of metal structures and parts of structures
25120 : Manufacture of doors and windows of metal
25210 : Manufacture of central heating radiators and boilers
25290 : Manufacture of other tanks, reservoirs and containers of metal
25300 : Manufacture of steam generators, except central heating hot water boilers
25400 : Manufacture of weapons and ammunition
25500 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
25610 : Treatment and coating of metals
25620 : Machining
25710 : Manufacture of cutlery
25720 : Manufacture of locks and hinges
25730 : Manufacture of tools
25910 : Manufacture of steel drums and similar containers
25920 : Manufacture of light metal packaging
25930 : Manufacture of wire products, chain and springs
25940 : Manufacture of fasteners and screw machine products
25990 : Manufacture of other fabricated metal products nec
26110 : Manufacture of electronic components
26120 : Manufacture of loaded electronic boards
26200 : Manufacture of computers and peripheral equipment
26301 : Manufacture of telegraph and telephone apparatus and equipment
26309 : Manufacture of communication equipment (other than telegraph/telephone apparatus)
26400 : Manufacture of consumer electronics
26511 : Manufacture of electronic instruments/appliances for measuring, testing, and navigation
26512 : Manufacture of electronic industrial process control equipment
26513 : Manufacture of non-electronic instruments and appliances for measuring, testing
26514 : Manufacture of non-electronic industrial process control equipment
26520 : Manufacture of watches and clocks
26600 : Manufacture of irradiation, electromedical and electrotherapeutic equipment
26701 : Manufacture of optical precision instruments
26702 : Manufacture of photographic and cinematographic equipment
26800 : Manufacture of magnetic and optical media

27110 : Manufacture of electric motors, generators and transformers
27120 : Manufacture of electricity distribution and control apparatus
27200 : Manufacture of batteries and accumulators
27310 : Manufacture of fibre optic cables
27320 : Manufacture of other electronic and electric wires and cables
27330 : Manufacture of wiring devices
27400 : Manufacture of electric lighting equipment
27510 : Manufacture of electric domestic appliances
27520 : Manufacture of non-electric domestic appliances
27900 : Manufacture of other electrical equipment
28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
28120 : Manufacture of fluid power equipment
28131 : Manufacture of pumps
28132 : Manufacture of compressors
28140 : Manufacture of other taps and valves
28150 : Manufacture of bearings, gears, gearing and driving elements
28210 : Manufacture of ovens, furnaces and furnace burners
28220 : Manufacture of lifting and handling equipment
28230 : Manufacture of office machinery and equipment (except computers/peripheral equipment)
28240 : Manufacture of power-driven hand tools
28250 : Manufacture of non-domestic cooling and ventilation equipment
28290 : Manufacture of other general-purpose machinery n.e.c.
28301 : Manufacture of agricultural tractors
28302 : Manufacture of agricultural and forestry machinery (other than agricultural tractors)
28410 : Manufacture of metal forming machinery
28490 : Manufacture of other machine tools
28910 : Manufacture of machinery for metallurgy
28921 : Manufacture of machinery for mining
28922 : Manufacture of earthmoving equipment
28923 : Manufacture of equipment for concrete crushing and screening roadworks
28930 : Manufacture of machinery for food, beverage and tobacco processing
28940 : Manufacture of machinery for textile, apparel and leather production
28950 : Manufacture of machinery for paper and paperboard production
28960 : Manufacture of plastics and rubber machinery
28990 : Manufacture of other special-purpose machinery n.e.c.
29100 : Manufacture of motor vehicles
29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
29202 : Manufacture of trailers and semi-trailers
29203 : Manufacture of caravans
29310 : Manufacture of electrical and electronic equipment for motor vehicles
29320 : Manufacture of other parts and accessories for motor vehicles
30110 : Building of ships and floating structures
30120 : Building of pleasure and sporting boats
30200 : Manufacture of railway locomotives and rolling stock
30300 : Manufacture of air and spacecraft and related machinery
30400 : Manufacture of military fighting vehicles
30910 : Manufacture of motorcycles
30920 : Manufacture of bicycles and invalid carriages

30990 : Manufacture of other transport equipment n.e.c.
31010 : Manufacture of office and shop furniture
31020 : Manufacture of kitchen furniture
31030 : Manufacture of mattresses
31090 : Manufacture of other furniture
32110 : Striking of coins
32120 : Manufacture of jewellery and related articles
32130 : Manufacture of imitation jewellery and related articles
32200 : Manufacture of musical instruments
32300 : Manufacture of sports goods
32401 : Manufacture of professional and arcade games and toys
32409 : Manufacture of games and toys (other than professional/arcade games and toys) n.e.c.
32500 : Manufacture of medical and dental instruments and supplies
32910 : Manufacture of brooms and brushes
32990 : Other manufacturing nec
33110 : Repair of fabricated metal products
33120 : Repair of machinery
33130 : Repair of electronic and optical equipment
33140 : Repair of electrical equipment
33150 : Repair and maintenance of ships and boats
33160 : Repair and maintenance of aircraft and spacecraft
33170 : Repair and maintenance of other transport equipment
33190 : Repair of other equipment
33200 : Installation of industrial machinery and equipment

Distribution

46110 : Agents involved in the sale of agric raw materials, live animals and textile raw materials
46120 : Agents involved in the sale of fuels, ores, metals and industrial chemicals
46130 : Agents involved in the sale of timber and building materials
46140 : Agents involved in the sale of machinery, industrial equipment, ships and aircraft
46150 : Agents involved in the sale of furniture, household goods, hardware and ironmongery
46160 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
46170 : Agents involved in the sale of food, beverages and tobacco
46180 : Agents specialised in the sale of other particular products
46190 : Agents involved in the sale of a variety of goods
46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
46220 : Wholesale of flowers and plants
46230 : Wholesale of live animals
46240 : Wholesale of hides, skins and leather
46310 : Wholesale of fruit and vegetables
46320 : Wholesale of meat and meat products
46330 : Wholesale of dairy products, eggs and edible oils and fats
46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks
46342 : Wholesale of wine, beer, spirits and other alcoholic beverages
46350 : Wholesale of tobacco products
46360 : Wholesale of sugar and chocolate and sugar confectionery
46370 : Wholesale of coffee, tea, cocoa and spices
46380 : Wholesale of other food, including fish, crustaceans and molluscs
46390 : Non-specialised wholesale of food, beverages and tobacco

46410 : Wholesale of textiles
46420 : Wholesale of clothing and footwear
46431 : Wholesale of gramophone records, audio tapes, compact discs and video tapes
46439 : Wholesale of radio and television goods and of electrical household appliances n.e.c.
46440 : Wholesale of china and glassware and cleaning materials
46450 : Wholesale of perfume and cosmetics
46460 : Wholesale of pharmaceutical goods
46470 : Wholesale of furniture, carpets and lighting equipment
46480 : Wholesale of watches and jewellery
46491 : Wholesale of musical instruments
46499 : Wholesale of household goods (other than musical instruments) nec
46510 : Wholesale of computers, computer peripheral equipment and software
46520 : Wholesale of electronic and telecommunications equipment and parts
46610 : Wholesale of agricultural machinery, equipment and supplies
46620 : Wholesale of machine tools
46630 : Wholesale of mining, construction and civil engineering machinery
46640 : Wholesale of machinery for the textile industry and of sewing and knitting machines
46650 : Wholesale of office furniture
46660 : Wholesale of other office machinery and equipment
46690 : Wholesale of other machinery and equipment
46711 : Wholesale of petroleum and petroleum products
46719 : Wholesale of fuels and related products (other than petroleum and petroleum products)
46720 : Wholesale of metals and metal ores
46730 : Wholesale of wood, construction materials and sanitary equipment
46740 : Wholesale of hardware, plumbing and heating equipment and supplies
46750 : Wholesale of chemical products
46760 : Wholesale of other intermediate products
46770 : Wholesale of waste and scrap
46900 : Non-specialised wholesale trade
49410 : Freight transport by road
49420 : Removal services
52101 : Operation of warehousing and storage facilities for water transport activities of division 50
52102 : Operation of warehousing and storage facilities for air transport activities of division 51
52103 : Operation of warehousing and storage facilities for land transport activities of division 49
52211 : Operation of rail freight terminals
52212 : Operation of rail passenger facilities at railway stations
52213 : Operation of bus and coach passenger facilities at bus and coach stations
52219 : Other service activities incidental to land transportation, n.e.c.
52241 : Cargo handling for water transport activities of division 50
52242 : Cargo handling for air transport activities of division 51
52243 : Cargo handling for land transport activities of division 49
53100 : Postal activities under universal service obligation
53201 : Licensed Carriers
53202 : Unlicensed Carriers
82920 : Packaging activities

Other Industrial

38110 : Collection of non-hazardous waste
38120 : Collection of hazardous waste

38210 : Treatment and disposal of non-hazardous waste
38220 : Treatment and disposal of hazardous waste
38310 : Dismantling of wrecks
38320 : Recovery of sorted materials
39000 : Remediation activities and other waste management services
43210 : Electrical installation
43220 : Plumbing, heat and air-conditioning installation
43290 : Other construction installation
43310 : Plastering
43320 : Joinery installation
43330 : Floor and wall covering
43341 : Painting
43342 : Glazing
43390 : Other building completion and finishing
43910 : Roofing activities
43991 : Scaffold erection
43999 : Specialised construction activities (other than scaffold erection) n.e.c.
45200 : Maintenance and repair of motor vehicles
45400 : Sale, maintenance and repair of motorcycles and related parts and accessories
95110 : Repair of computers and peripheral equipment
95120 : Repair of communication equipment
95210 : Repair of consumer electronics
95220 : Repair of household appliances and home and garden equipment
95230 : Repair of footwear and leather goods
95240 : Repair of furniture and home furnishings
95250 : Repair of watches, clocks and jewellery
95290 : Repair of other personal and household goods

Office

58110 : Book publishing
58120 : Publishing of directories and mailing lists
58130 : Publishing of newspapers
58141 : Publishing of learned journals
58142 : Publishing of consumer, business and professional journals and periodicals
58190 : Other publishing activities
59111 : Motion picture production activities
59112 : Video production activities
59113 : Television programme production activities
59120 : Motion picture, video and television programme post-production activities
59131 : Motion picture distribution activities
59132 : Video distribution activities
59133 : Television programme distribution activities
59200 : Sound recording and music publishing activities
60100 : Radio broadcasting
60200 : Television programming and broadcasting activities
62011 : Ready-made interactive leisure and entertainment software development
62012 : Business and domestic software development
62020 : Computer consultancy activities
62030 : Computer facilities management activities

62090 : Other information technology and computer service activities
63110 : Data processing, hosting and related activities
63120 : Web portals
63910 : News agency activities
63990 : Other information service activities nec
64110 : Central banking
64191 : Banks
64192 : Building societies
64201 : Activities of agricultural holding companies
64202 : Activities of production holding companies
64203 : Activities of construction holding companies
64204 : Activities of distribution holding companies
64205 : Activities of financial services holding companies
64209 : Activities of other holding companies n.e.c.
64301 : Activities of investment trusts
64302 : Activities of unit trusts
64303 : Activities of venture and development capital companies
64304 : Activities of open-ended investment companies
64305 : Activities of property unit trusts
64306 : Activities of real estate investment trusts
64910 : Financial leasing
64921 : Credit granting by non-deposit finance houses and specialist consumer credit grantors
64922 : Activities of mortgage finance companies
64929 : Other credit granting n.e.c.
64991 : Security dealing on own account
64992 : Factoring
64999 : Other financial service activities, except insurance and pension funding n.e.c.
65110 : Life insurance
65120 : Non-life insurance
65201 : Life reinsurance
65202 : Non-life reinsurance
65300 : Pension funding
66110 : Administration of financial markets
66120 : Security and commodity contracts brokerage
66190 : Other activities auxiliary to financial services, except insurance and pension funding
66210 : Risk and damage evaluation
66220 : Activities of insurance agents and brokers
66290 : Other activities auxiliary to insurance and pension funding
66300 : Fund management activities
68100 : Buying and selling of own real estate
68201 : Renting and operating of Housing Association real estate
68202 : Letting and operating of conference and exhibition centres
68209 : Letting and operating of own or leased real estate n.e.c.
68310 : Real estate agencies
68320 : Management of real estate on a fee or contract basis
69101 : Barristers at law
69102 : Solicitors
69109 : Activities of patent and copyright agents; other legal activities n.e.c.

69201 : Accounting, and auditing activities
69202 : Bookkeeping activities
69203 : Tax consultancy
70100 : Activities of head offices
70210 : Public relations and communication activities
70221 : Financial management
70229 : Management consultancy activities (other than financial management)
71111 : Architectural activities
71112 : Urban planning and landscape architectural activities
71121 : Engineering design activities for industrial process and production
71122 : Engineering related scientific and technical consulting activities
71129 : Other engineering activities (not including engineering design for industrial process)
71200 : Technical testing and analysis
72110 : Research and experimental development on biotechnology
72190 : Other research and experimental development on natural sciences and engineering
72200 : Research and experimental development on social sciences and humanities
73110 : Advertising agencies
73120 : Media representation
73200 : Market research and public opinion polling
74300 : Translation and interpretation activities
74901 : Environmental consulting activities
74902 : Quantity surveying activities
74909 : Other professional, scientific and technical activities
77400 : Leasing of intellectual property and similar products, except copyrighted works
78101 : Motion picture, television and other theatrical casting
78109 : Activities of employment placement agencies n.e.c.
78200 : Temporary employment agency activities
78300 : Other human resources provision
80100 : Private security activities
80200 : Security systems service activities
80300 : Investigation activities
82110 : Combined office administrative service activities
82190 : Photocopying, document preparation and other specialised office support activities
82200 : Activities of call centres
82301 : Activities of exhibition and fair organizers
82302 : Activities of conference organizers
82911 : Activities of collection agencies
82912 : Activities of credit bureaus
82990 : Other business support service activities nec
84110 : General public administration activities
84120 : Regulation of providing health care, education, cultural services and other social services
84130 : Regulation of and contribution to more efficient operation of businesses
84210 : Foreign affairs
84300 : Compulsory social security activities
94110 : Activities of business and employers membership organisations
94120 : Activities of professional membership organisations
94200 : Activities of trade unions
94910 : Activities of religious organisations

94920 : Activities of political organisations

94990 : Activities of other membership organisations n.e.c.

Appendix Four: Acknowledgements

Name	Company
Penny Calder	Braintree District Council
Tim Collins	Kemsley LLP
Adrian Cousins	Witham Industrial Watch
Danielle Estlea	Braintree District Council
Jeremy Taylor	Braintree District Council
Adam Tindall	Coke Gearing
Heidi Turnbull	Braintree District Council
Jasmine Warren	Joscelyne Chase